Lifecycle Manager

Thin Client

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Disclaimer

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Introduction to the Library

Your library provides the means to easily find, identify, and qualify/disqualify various assets for potential use on your development project. It facilitates both the cataloging and discovery of the technical aspects of how an asset works and how it interacts with other assets. For example, your Akana® solution enables the mapping of assets to a reference model. These asset mappings provide the means for library users to locate assets based on classifier values. Once a useful asset is found in the library, its artifacts can be made available for use in your development project. In some cases use of an asset must be approved for your project. In addition, your application facilitates the comparison of found assets, thereby supporting your understanding of whether an asset is useful for your project.

Your library is designed to effectively support asset reuse by:

- Providing a service to capture and categorize assets.
- Facilitating the process for enterprise business analysts to find assets by navigating a familiar reference model.
- Facilitating the process for enterprise developers and integrators to find, identify, qualify and disqualify library assets based on technical merit.
- Providing management tools that support recognition and measurement of behavior leveraging valuable assets.

Akana Applications

In addition to the web browser application you are using to view this help page, The Akana solution also provides a variety of rich-client applications available to use for accessing your library. You can obtain the downloads for these, in addition to a number of related tools supporting automation, reference model creation, etc. by clicking on the **Downloads** link available on your top navigation bar. Each of the downloadable items provides its own help documentation or an embedded help system.

Building a Library

From a high level, the following processes are involved when you build a library for your enterprise:

- The library is established by your System Administrator.
- Library roles are assigned to the users who will interact with the system.
- Governance is established for various processes in your system, such as the publish of assets into your library and the reuse of assets by a project.
- Assets are captured and cataloged in your library's asset source and/or external asset sources are identified.
- Assets are published into the library, making them available to library users.

Establishing the Organizational Structure and Work Environment

Your library is customized for use in the following ways:

- Your Global Asset Definition and the individual asset types are established by a Library Administrator. Constraints applicable to the creation, update and promotion of assets are established for validation purposes during asset production.
- Library Configuration may be used to establish process configuration, XML validation, role-based asset views, etc. See your Library Administrator for more information.
- An organizational structure is established for your library by the creation and definition of groups and projects. Users assigned the role of Usage Controller are responsible for creating the library group hierarchy. Project Managers may also be involved in the assignment of users and their roles

for their project.

  - Groups are created and their hierarchy is established to reflect the organizational structure required by the enterprise development organization for library usage and reporting needs.
  - Projects are created to serve as the context for asset searching and registration of library asset usage.
  - User Accounts are created and assigned to one or more projects, if applicable.
  - Users are assigned roles pertinent to their planned interaction with the library.
  - Project Managers are identified.

- System settings and default information are established by the Usage Controller.
  - Classification criteria sets are established.
  - Profiles are created and associated with groups.
- Reference models are created and published to the library.
- The work environment is defined for each project by a Usage Controller.
  - Asset views are created and associated with groups, if applicable.
  - Groups are associated with applicable reference models.
  - Asset filters are added to group profiles as necessary.

Using the Library

The major goal in establishing a library is to facilitate the finding of assets that match stated criteria or are related to a domain represented by one or more reference models. A closely related goal is to support the library user in learning about an asset they have found. Library users that perform activities related to these goals are called asset users.

Other supporting functionality includes:

- The ability to capture asset information and publish assets to the library, making them available to library users.
- Establishing the ability to govern each of four processes:
  - Asset Submission for publish
  - Asset Deletion
  - Asset Acquisition by a project
  - Revocation of an Asset Acquisition
- The ability to collaborate with other users on various aspects of asset searches and assets found.
- The "registration" of assets used by a development project for tracking and metric purposes.
- The ability to download the artifacts of an asset for use on a project.

Asset User Activities

See Asset User for more information.

Management Reporting

Your application supports management reporting in a variety of ways. In addition to Application Metrics that are displayed for assets, project and groups, standard reports and database views are also provided. Please see Reporting for more information.

Working in the Library

Upon logging in to your library, you will see the following items available to you:

Top Banner

Across the top of your window is displayed the top banner. The default display in the top banner is Akana® branding information; however your library may be configured to display the branding information for your enterprise.

Top Navigation Bar

The top navigation bar is directly below the top banner. It includes various items that are available to all library users. See Top Navigation for more information.

Bread Crumb Navigation

The bread crumb navigation links are directly below the top navigation bar. The bread crumbs provide you with a quick navigation to previous pages viewed when navigating a multi page process. For example, if you are creating a new thread for a discussion topic, you can use the bread crumbs to navigate to the home page versus the general discussion forum page.

Left Navigation Bar

The left navigation bar is directly below the custom search. It includes two sections:

1. A set of role-based task navigation items determined by your user role assignments. For example, if your user account is assigned only the role of asset user, the only role-based navigation items you will have are My Requests and Pending Requests. Alternatively, if your account is assigned the role of Asset Capture Engineer as well, your left navigation bar will also include the Asset Capture Engineer specific items of Assets in Progress, Create Asset and Import Assets. See Roles for more information on role-based tasks and the navigation items for each.

2. Your asset tree, which lists the assets available to your project grouped by asset classifier values. Each group is an expandable item until you reach the asset name, which is linked to the asset information pages. See Left Navigation Bar for more information.

Center Pane

The center display pane of your library application is located below the top navigation bar and to the right of the left navigation bar. It displays various pages and information as a result of selections you make in conducting library activities. When you login to the library, your center pane will display your home page.

Library Information Display

The following describes some of the various ways information is displayed as you work in your library. Information may be presented in your center pane, a newly opened browser window or in a dialog box or pop-up window.

Display Type	Description	Displayed by:
Home page	This is the page you see in the center pane upon logging in to the library. It consists of sections of information, some of which are based on your current selection of default project. You have the ability to switch to a different project on this page, if you are assigned as participant to more than one project.	Upon login or when you click on Home in the top navigation bar.

List page	A page displaying a columnar list of information on the chosen topic in the center pane. There are often name links on this type of page so users can display the detail page of the named item. In addition, there is often a create new link, so you can display the create page for the topic.	For example, by clicking on the left navigation bar item for a topic, such as My Requests.
Create page	A center pane page displaying the field names and commands necessary or helpful in creating a new instance of an item. By clicking the **Save** command button after entering information for the new item, the new instance is created and the detail page for the new item is displayed. You can add additional information or modify existing data on the item from the detail page.	Clicking on a **create new** link.
Detail page	A center pane page displaying detailed information on an instance of the selected item. This type of page also enables the editing of those fields of the item which are able to be modified.	Clicking on the item's name link.
Results page	A type of list page that displays assets found in the center pane. The list is a columnar list of information about assets found in the library that meets the search criteria. You can edit the properties of the search by clicking on the **Edit Search Properties** link available on this page.	Choosing a group node from your asset tree, running a search from the search box or running an asset query or model based search.
New Window	A new browser window may be opened by your application when you make certain selections, such as help or selecting an asset artifact. Closing this window has no effect on your original library application window.	Clicking on the button or link associated with certain selections.
Confirmation Message	A window displayed in response to selecting a command. This window may confirm an action made by the system or may require you to confirm the action by your response before the system performs the command.	Choosing a command which requires confirmation before being performed by the system.
Tool Tip	A tool tip window displays more information about the item your hovering over. This tool tip window has additional details or descriptions for the button, icon, link or label. Some icon hover help will open a tool tip that will remain open until you close the window.	Hovering over or clicking on an icon, label, active link or button.

Application Conventions

When you are using your application you will notice the following conventions apply:

Buttons

As you perform functions on pages within your application, various buttons may be displayed to enable you to complete a task.

Clear

Erases any values displayed in the window, if they can be erased. The clearing of the fields is not saved until the **Save** button on the page is selected.

Submit

Commits any information you have entered or changes that you have made, and closes the current active window.

Save

Stores any information you have entered or changes that you have made.

Reset

Replaces the information in the fields on the pop-up with those that were present before you changed the fields' values. The replacement values of the fields are not saved until the **Save** button on the page is selected.

Cancel

Returns to your previous page, ignoring any input or changes you have entered.

Page Buttons, Links and Icons

As you use your library, you will encounter a variety of links, iconsand buttons. In general, clicking on a link takes you to the linked page identified. Clicking on or hovering over an icon opens a tool tip or new popup. Clicking on a button causes the system to take the action designated.

Unique Name Requirements

The following items require a unique name within your library:

- Groups
- Asset views
- Profiles
- Projects
- Users
- Classification criteria sets
- Asset Query Specifications (AQS)

Login

This page is displayed when you enter the URL to access your library. In most cases, to login you must select a library and enter your user name and password. It is possible, if your installation utilizes single sign-on (SSO), that this page will display as as a library-selection-only page. In this case, you will not be required to enter User Name and Password as described below.

Library

Choose a library from the drop down list. All libraries available to you from your installation are included in this list. Note: you may not see a list of libraries if your installation is configured to suppress this list. In this case, enter the name of the library you wish to access.

User Name

Enter your assigned user name here. This is a required field.

Password

Enter the password assigned to your library account. This is a required field.

[Reset Password]

Click this link to reset your password. Enter your User Name and Email then click the **Submit** button. Your password will be reset, and an email will be sent which contains a new generated password.

Buttons

The following buttons are available to you at the bottom of the login page:

Login

Once you have entered your Library, User Name and Password, click on this button to log in. When you're successfully logged in, your home page is displayed and you can navigate where you wish.

Reset

Click on this button if you have entered some or all of the information required on this page and wish to clear these values.

Don't have an account? Request One

This item may or may not be displayed on your login page, depending on your installation's access configuration. This link will be displayed if your installation is configured to use LDAP in "native mode." If this is the case, the web browser application login page offers you a means to request an LDAP account by clicking on the **Request One** link and filling out some information on the page displayed. Upon completion of your user information, clicking on the **Submit** button results in a request for account creation. The next step is determined by the configuration of your library related to user account creation. You will either receive your library account immediately and see your home page displayed or you will need to wait for the creation of your account by a library Usage Controller.

Providing Access to your Library

Accessing your library is governed by configuration settings established for your installation. For example, your installation may use an LDAP system to provide user authentication and contact information for the various people who will be library users. In addition, your organization may utilize a type of single-sign-on (SSO) application to enable the common management of user credentials and information for software applications. Please see your System Administrator for more information.

Library User Authentication

Your installation may use LDAP or another form of authentication system. In either case, your installation will be configured in one of the following ways with regard to the source of the user information used. The configuration chosen affects the creation of user accounts and the behavior of the user login page:

1. Guest Mode--> Your installation is configured for guest mode operation if your library will have nothing to do with establishing or maintaining LDAP credentials. Guest mode configuration means that when a new user is to have an account created for them in a library, they must have established LDAP credentials. Creation and maintenance of these credentials is accomplished through your LDAP application, outside of your application. This is the most common configuration.

2. Native Mode--> Native mode configuration of LDAP means that your application serves as the interface to create and maintain LDAP credentials. For example, when a new user is to have an account created for them in a library, they go to the library's login page and click on the **Request an Account** button. Your application triggers the LDAP credentials for the user and enables the library account creation.

User Account Creation

There are two specific modes in which your library may be configured for user account creation, regardless of your source for user authentication and contact information (described in the previous section):

1. Controlled access--> this mode means that user accounts can be created only by library users who have been assigned the role of Usage Controller.

2. Uncontrolled access--> means that any user who has valid credentials (in your user authentication system) can trigger the creation of their own account simply by accessing the library's login page and entering their account name and password. Through this action, a user account is created for them in the library. However, in this case, a Usage Controller is still necessary to assign them to any projects or to give them any roles other than Asset User.

Your library's access configuration is determined by your installation configuration. Primarily, this configuration affects how you approach setting up a new library account and what involvement is required by the Usage Controllers of your library in that creation. Please see your System Administrator for more information on your library's access and contact information source configuration.

Request a User Account

If your library is configured for the native mode of LDAP (see About Library Access), your library Login page has a **Request One** link that enables you to request a user account for the library. Clicking on that link displays this page.

Request an Account page Content

The Request an Account page contains the following text boxes:

Library:

Choose the name of the library for which you wish to create an account.

First name:

Enter your first name.

Last name:

Enter your last name.

Email:

Enter your email address. Note that this email address will be used by your application for the various notifications it produces for your account.

Account Name:

Enter the account login you would like to use to access your account.

Password:

Enter the password to be associated with your account.

Verify Password:

Enter your password a second time, so that it can be verified against the password you entered the first time so the system can validate that they are the same.

Buttons

The following buttons are available to you at the bottom of the account request page:

Submit

Click on this button to submit your account request. Depending on the user account creation mode configuration of your library, this will result in either

1. Sending this request to your library Usage Controller(s) who will notify you when your account is available to you, or
2. Successfully logging you into the library for the first time, because your account is created for you automatically.

Reset

Click on this button to clear all fields on this page (except the library field), enabling to to start over entering information for your user account.

Top Navigation Bar

The top navigation bar is positioned just above your Left Navigation Bar and home page. It contains links enabling access to various capabilities as described below. With the exception of the **Administration** link, these are available to all library users, regardless of role assignments.

Top Navigation Bar Links:

Feedback

Clicking on this link takes you to a page where you can enter subject and message information to be sent electronically to a predetermined email address. The address to which your e-mail will be sent is obtained from information maintained by your Library Administrator.

After entering subject and message text, you can click on the **Submit** button to send your e-mail. With this action, the message is sent and you are returned to the page from which you had originally clicked on the Feedback link. Alternatively, at any time prior to clicking on Submit, you can click on the **Clear** button to delete text in the Subject and Message fields.

Discussion

Clicking on this link displays the General Discussion forum page. You can create or reply to topics of any kind. Please see General Forums for more information.

Support Center

Clicking on this link displays information about various support resources available to you. In addition, depending on your library role assignments, you may have additional items included that are related to role-related tasks. Please see Support page for more information.

Downloads

Clicking on this link displays the Download Center, a page offering download links and/or installation instructions for various Akana® solution applications and tools. Please see Download Center for more information.

[Language]

Where *Language* is the name of the current language being used for your application. If your installation is configured to provide multiple language support, this selection link is displayed. Selecting a language from this drop-down list immediately changes the language displayed in your application.

Administration

This link will only be displayed if you are a System Administrator for your library. Clicking on this link opens the system administration console, from which a variety of functions can be performed pertaining to your installation.

Home

Clicking on this link takes you to your home page. The home page is displayed upon login. You can return to the home page by clicking on this link. See Home Page for more information.

Help

Clicking on this link opens a window displaying the application on-line Help System. On the left side of your help browser window, is the help navigation panel. This panel enables you to move freely to any topic within the help system. Topic types included range from conceptual documents (like "About Library configuration" and "About Publishing Assets") to topics written specifically for individual application pages (like "Asset Edit Page" and "Create New Model Based Search Spec").

You can exit the help system by closing the Help window. This window is managed independently from your application browser window.

Logout

Clicking on this link ends your current library session and displays the login page.

Left Navigation Bar

On the left side of your application you have what is called the left navigation bar. The left navigation bar has five sections. Each section provides access to tasks corresponding to five general categories. Two of these categories are not included unless you have the necessary role assignments for the related tasks. The five general categories are:

- Asset Consumption - included for all users
- Asset Production - included if you are assigned the Asset Capture Engineer role for one or more groups
- Governance - included for all users
- Administration - included if you are assigned the Library Administrator or Usage Controller role for your library
- Asset Tree - included for all users

Consumption

The Consumption section of your left navigation bar offers information and links related to your Active Project and, if your library is configured to support asset-based acquisition, to Active Asset. It also includes a facility for conducting searches for assets and other items. The Consumption section is displayed for all users, regardless of role assignment.

Active Project

The name of your current active project is listed here. The project name provides a link to display the Project Details page. Next to the project name is a **[Change]** link which will display a page enabling you to select a different project to be your current active project. Note that your choice of a different active project does not persist beyond your current session unless you designate the newly selected project to become your **Default**.

Active Asset

If your library is configured to support asset-based acquisition, the name of your current active asset is listed here. The active asset name provides a link to display the corresponding asset in progress in read-only view. Next to the active asset name is a **[Change]** link which will display a page enabling you to change your active asset to any other asset that references your active project as its project context. Changing your active asset is persisted until the next change of active asset or active project. See editing asset context for more information about project context. See Editing Asset Relationships for more information editing context enabled relationships.

Search Box

Your application offers a search box that enables you to perform searches for assets. Enter an optional search string in the search box and click the **Search** button to run a search. Searches performed with the search box are searches in that they produce results without saving the criteria used for the search. Optionally, asset searches performed with the search box can be saved as Asset Queries by editing and saving your search properties. See About Searching with the Search Box for more information about search box searches.

The search box is comprised of two items:

- An optional text string criteria box. You may include one or more search strings with which to filter your results based on asset values meeting the search string criteria.
- A **Search** button with which to initiate the search.

Custom Search

You can perform custom searches for assets and other various items, depending on the roles you are assigned. The custom search dropdown is located below the search box. Click the dropdown list to choose the type of search you want to run. Enter your search criteria on the Advanced Search popup and click the **Search** button to run the search. Searches performed with the custom search are searches in that they produce results without saving the criteria used for the search. Optionally, asset searches performed with the custom search can be saved as Asset Queries by editing and saving your search properties. See Custom Search for more information about custom search options.

The custom search is comprised of three items:

- The search context selection, which enables you to choose a search type to use.
- An Advanced Search popup allowing you to enter additional search criteria. You may include one or more search strings with which to filter your results based on asset values meeting the search string criteria.
- A **Search** button with which to initiate the search.

Asset Working Set

The Asset Working Set allows you to group together a set of published assets in order to perform actions against them. First, assets are selected and added to the working set from the Search Results page, the Asset Information page, the Asset Information snapshot window, or from the right-click context menu of the Asset Tree or Quick Search pane. When you are ready to perform an action against the assets in your working set, click on the Asset Working Set link to bring up the Asset Working Set dialog.

Assets in your working set are unique for each library user, and the assets in the list are persisted across logon sessions.

Production

The Production section of your left navigation bar offers information and links related to your Active Production Group and a set of links corresponding to the production of assets. The Production section is displayed only if you are assigned the role of Asset Capture Engineer.

Active Group

Once you have created your first asset, the name of your current active production group is listed here. If you have not yet created an asset, and have not used the **[Change]** link to select an active group, the active group will be displayed as "None."

The active production group setting is used to provide a default owning group for new assets you create. You have the option to override this default when creating or editing an asset. If you do, the new group you choose will be used to set a new active production group. See Creating an Asset or Editing an Asset for more information.

Assets in Progress

Assets in progress are assets in your library's asset source. The assets in progress referenced by this link are those for which you are assigned Asset Capture Engineer responsibility. The number of assets you currently have locked is displayed next to this link. Clicking on the Assets in Progress link displays a tabbed page with the **Locked Assets** tab active. Two other tabs provide access to assets you've recently edited and all of your locked assets respectively. See Assets in Progress for more information.

Create Asset

Clicking on this item displays a page allowing you to create a new asset in your library's asset source. On this page, you can choose the type of asset and the capture template to be used for its validation. Also on this page you will enter identification information for the asset and select its owning group. Saving the information you've entered on this page results in the creation of an asset in your asset source and the subsequent display of its corresponding asset edit page which enables you to add additional metadata to the new asset. See Creating an Asset for more information.

Import Assets

If your library is configured to support import of assets from an external system, your left navigation bar will offer this item. Clicking on **Import Assets** displays a page enabling you to select and import assets from a registry system external to your application, such as from Akana Service Manager or a UDDI registry. See About Asset Import for more information.

Governance

The Governance section of your left navigation bar offers access to requests you have originated and also to requests pending your action, if you are assigned a governance role.

My Requests

This link provides access to a list of requests you've originated that are currently pending approval. The My Request list page displayed as a result of clicking on this item will include only active asset requests for submission, deletion, and acquisition. All users have access to this item. The number displayed on this item in the left navigation bar indicates how many of your requests are currently active.

For example when you attempt to acquire an asset for use on your project, your library may be configured to use asset acquisition governance. If so, and if one or more approvals is required for your project to use this asset, you will see your request listed in your My Requests list until the request has been fully approved or rejected.

You can also choose to display a list of your requests that are no longer active by clicking on the **[My Request History]** link on the My Request page.

Pending Requests

This link provides access to a list of requests that are currently pending your approval. The Pending Requests item will not be used unless you are assigned a governance role.

Clicking on this item displays a list of pending requests for the groups for which you have been assigned one or more of the following roles: Publisher, Project Manager, Asset Owner and/or one or more custom roles configured for your library. The Pending Request list page displayed as a result of clicking on this item will include a pool of requests based on the roles you've been assigned and the scope of your responsibilities for those roles. All types of requests are included on the request list page, such as submission, publish and acquisition requests. The number displayed on this item in the left navigation bar indicates how many requests are pending your action.

For example when an Asset Capture Engineer submits an asset for publish and the process configuration associated with the asset requires your approval for the publish of the asset, you will see a pending request item in your Pending Requests list.

You can also choose to display a list of requests you have acted on previously by clicking on the **[Request History]** link on the Pending Request page.

Administration

The Administration section of your left navigation bar offers a set of links related to the administrative tasks of a Usage Controller. The Administration section is displayed only if you are assigned the Usage Controller role.

Administration Section Content

Active Group

The name of your current Active Administration Group is listed at the top of this section. The Active Administration Group specifies the group the Usage Controller will perform tasks against. To change the active group, click on the **[Change]** link.

Asset Requests

Clicking on this item displays the Manage Requests page which enables you to list all asset requests generated for the active administration group. Use the table widget provided to filter and sort the asset requests displayed as necessary.

Asset Views

Clicking on this item displays a list of all the asset views in the library. Click on an asset view name link in the list to display the corresponding Asset View detail page. See Asset View list page.

Asset Management

Clicking on this item displays the Asset Management page which enables you to display a list of assets in your active administration group's asset source. Use the table widget provided to filter and sort the assets displayed as necessary. From the result list, you can view information recorded for each asset and unlock assets in progress that are locked by Asset Capture Engineers.

Contacts

Clicking on this item displays the Contact List page which includes all contacts available in your installation. Click on a **[Select]** link corresponding to an email address in the list to display the corresponding contact edit page. Contacts created and maintained by a Usage Controller can be added to an asset's publish information via the publish template used with initial asset creation and/or by edit of asset publish information by a user assigned the Publisher role.

Note: An alternative method used to store asset contact information is to create each contact as a compound classifier or an artifact included in the asset metadata. This alternative approach supports the ability of an Asset Capture Engineer to create and maintain the contact information of an asset. If this alternative method is used, the Contacts item on the left navigation bar is not applicable for your library.

Classification Criteria Sets

Clicking on this item displays the Classification Criteria Set list page which includes all classification criteria sets in the library. Click on a classification criteria set name link in the list to display the corresponding detail page.

Classification Criteria Sets can be used when establishing criteria for a profile or an asset search. They may also be used when setting up assets to be shared between different libraries.

Groups

Clicking on this item displays the Group list page which includes all the groups defined within the scope of the active administration group. There are two categories of groups listed: non-project groups and project groups. Click on a group name link in the list to display the corresponding detail page.

Profiles

Clicking on this item displays the Profile list page which includes all the profiles defined for the active administration group. Click on a profile name link in the list to display the corresponding Profile detail page.

Relationship Contexts

Clicking on this item displays the Manage Relationship Contexts page which includes a list of relationship contexts created, for example, for assets with acquisition relationships established to other assets. The Manage Relationship Contexts page provides a useful view of all asset acquisitions requested within the scope of the active administration group, regardless of current approval status. A **[Details]** link is provided for each application request to display the corresponding Relationship Context Page.

Users

Clicking on this item displays a table including the names and attributes of users who have accounts defined within the scope of the active administration group. The table displays the first one hundred users and enables you to sort and filter the user data so that you can display the information necessary. See User list page for more information.

About Asset Tree Groups

One way to find assets published to your library is by working with your asset tree. In the asset tree, assets are organized into groups based on the values they hold for classifiers that have been designated as "sort classifiers." If you are using a web browser application, you'll find the asset tree at the bottom of your left navigation bar. If you are using a rich client application, your asset tree in contained in the asset folder of your Library Explorer view.

Asset Tree Organization

Asset tree organization is designated for your project by a Usage Controller. Each project you participate in may have a different asset tree organization, or they may share the same organization. You can customize your asset tree by overriding project settings and choosing your own selection of classifiers to group by.

Configuring your Asset Tree Groups

If you're using the web browser application, you can configure your asset tree by clicking on the Configure Tree button at the top of the asset tree. If you are using a rich client application, you can configure your asset tree by clicking on the down arrow available in the icon bar of your Library Explorer view, then selecting **Profile**.

Designating Sort Classifiers

You can identify which classifiers to use as Sort Classifiers by configuring your asset tree. All classifiers included in your library's asset definition are available for grouping assets in the asset tree.

Group Hierarchy

You can choose up to four classifiers for use in your asset tree. Select the sort classifiers in the order corresponding to the groups levels you desire. The first (or top) classifier identified will represent the highest level group and so on.

Alternative Displays

Some assets included in your tree may not have values for one or more of the sort classifiers identified. When this is the case, the assets will be included in a group under the heading "Unclassified" when appropriate.

If there are no sort classifiers designated for your project or your personal asset tree settings, your asset tree will show all assets sorted into alphabetical order by the asset name with a secondary sort on asset version.

Asset Tree

Your asset tree includes assets published into the library that are visible to your active project. Ordinarily, the assets are grouped by "sort classifiers" which are classifiers identified for tree configuration. Assets are sorted alphabetically within each group. If sort classifiers are not used, the assets are simply listed alphabetically. All users have access to this item.

If sort classifiers are used, clicking through the nested asset categories to the lowest level results in a list of asset names that have the corresponding sort classifier value(s). Each asset in this list is a name link. Clicking on the asset name link displays the asset's information page.

The number of assets included in each node of the asset tree is listed to the right of the node name. The number of assets displayed for each node is limited to a maximum of up to fifty assets. The number of assets displayed per node is configurable on your Asset Tree Configuration page. You can click on **more...** to see all assets corresponding to the node.

At any group level, you can choose to click on the group link itself instead of the expansion widget. This action will cause the display of all assets in the group as a result page in your center pane. To perform this action you can click on any group node within the tree with the exception of *Unclassified* nodes, which do not provide a search link.

If you wish, you can configure your asset tree to expand to an asset node when the asset's information page is displayed through alternate means, such as from an asset search result. There are a number of ways to display the information page for an asset, and in each case your tree would expand to the corresponding asset in the tree if you designate this in your asset tree configuration.

Asset Tree Icons

Expand/Collapse Icon

Click the **Expand/Collapse** icon to open or close the asset tree. All users have access to this item.

Refresh Tree Icon

Click the **Refresh Tree** icon to manually trigger an update of the items in the asset tree. Often the tree is automatically updated when a change has been made to library assets. However, in some cases a manual refresh is necessary. All users have access to this item.

Configure Tree View Icon

Click on the **Configure Tree View** icon to display the Asset Tree Configuration page. This page enables you to manage the grouping of assets, the number of assets displayed in the tree and the expansion of the asset tree with the display of an asset. All users have access to this item.

Right-click Context Menu

Your asset tree provides a right-click context menu that gives you quick access to certain operations. The following operations can be performed on an individual asset by right-clicking on it:

- Show in Main Window - display the asset information for the selected asset in the current browser window.
- Show in New Browser Tab/Window - display the asset information for the selected asset in a new browser tab or window. Your browser settings determine whether a new tab or a new browser window is opened.
- Show in Snapshot Window - display the asset information for the selected asset in a new asset snapshot (popup window).
- Show Relationship Tree - display a hierarchical listing of relationships for the asset in a new popup window.
- Add to Working Set - add the selected asset to the asset working set. After assets have been

added to the working set, you can perform actions against them using the Asset Working Set dialog.

Edit Asset Tree Sort Classifiers

Sort classifiers are used to sort assets shown on the asset tree. This page enables you to add, remove, or select different sort classifiers for this profile. The sort classifiers available in the drop-down are the classifiers defined for your library in its Global Definition Template. You can select up to four classifiers for sorting. Project users can override these classifer settings by configuring their asset tree and selecting the Use My Sort Classifiers option. The asset tree can be configured by clicking on the configure tree view icon in the asset tree's title bar.

Edit Asset Tree Sort Classifiers page content

The Edit Asset Tree Sort Classifiers page contains the following selections and information:

Home

Click on this bread crumb link to display your Home page.

Profile List

Click on this bread crumb link to display the list of profiles in your library.

Profile Details

Click on this bread crumb link to display the profile you are editing.

To add an additional sort classifier, click on the down arrow next to a sort classifier choice that is currently not set, and select a sort classifier. To remove a sort classifier, click on the down arrow next to the sort classifier to be removed, and change the selection to none, which indicates there is no current selection. To change an entry to use a different sort classifier, click on the down arrow next to a sort classifier choice and change its selection to a different classifier.

Note: If you leave all the sort classifier settings set to **none**, this means all asset names will be shown in your asset tree, in alphabetical order.

Buttons

When you are finished selecting the sort classifiers for your profile, click on the following button of your choice.

- Click on **Save** to record your changes and return to the Profile detail page.
- Click on **Cancel** to return to the Profile detail page without recording any changes.

Asset Tree Configuration

Your asset tree includes assets published into the library that are visible to your active project. You can configure how the assets in the tree appear when you expand the tree. This page allows you to configure the following items for assets shown on the Navigation Tree:

- The expand/collapse behavior.
- The sort sequence.
- Whether to use the sort classifiers defined for your project, or use your own sort classifiers.
- The maximum number of assets to display under each node in the tree.

Asset Tree Configuration page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Choose the expand/collapse behavior for assets on the Navigation Tree

By default, the expansion of nodes in your asset tree is accomplished manually. However, you can elect to have your tree expand to the asset node corresponding to any asset displayed in your center pane. If you designate this behavior in your Asset Tree configuration, this means that each time an asset's information page is displayed, your asset tree will expand to expose the corresponding asset in the tree and highlight its name. Note: in some cases an asset you display in the center pane may not be listed in the asset tree display due to its limited number of assets displayed per node. When this is the case, the asset tree will not expand even though you have chosen the expansion behavior setting.

You also have the choice of whether or not to collapse the tree to close previous expansions and remove highlighting with each new asset displayed. If you choose not to automatically collapse the tree prior to displaying a new asset, you can manually do so by clicking on the collapse icon for the entire Asset Tree or for a particular branch at your discretion.

Choose the sort sequence for assets on the Navigation Tree

The classifiers chosen to be used for asset tree groupings are called sort classifiers. Sort classifiers are initially determined by the sort classifier settings established for your project. If your project is set up to use sort classifiers, the assets in your asset tree are grouped according to the values each asset has for the classifiers designated when the **Use Project Sort Classifiers** radio button is selected.

Each project may designate sort classifiers that differ from other projects. Consequently, you may see your asset tree change assets and groupings when you switch to a different active project. If you are a Usage Controller, see the Asset Tree Sort Classifiers section of the Profile detail page for more information on establishing the default asset tree settings for a project.

You can also customize your own asset tree groupings independently from project settings by selecting the **Use My Sort Classifiers** radio button. The classifiers available to you for grouping assets consist of all the classifiers established for your library's assets, independent of asset type. Some assets may not have values for one or more of your sort classifiers. In this case, the asset will still appear in your tree, but will be included in a group called "unclassified".

Compound Classifiers used for Grouping

In some instances a compound classifier is selected as a sort classifier for the asset tree, whether specified in your project profile or by your choice in tree configuration. Selection of a compound sort classifier results in assets grouped by each value they have for each of the classifier's fields. Within the asset tree, classifier fields are ordered according to the classifier's definition (from your library's global definition template) and the resulting tree nodes expand in a hierarchical manner. When an asset does not contain a value for one or more of the trailing fields of the compound classifier, the asset is included within an *UNCLASSIFIED* grouping.

Choose the maximum number of assets to display under each node on the Navigation Tree

Each node of your asset tree truncates the display of assets to a fixed number. This number initially defaults to thirty. However, you can configure your tree to display anywhere from five to fifty assets per node.

Home Page

Your Home page is displayed in the center pane of your application each time you login to your library account. You can return to the Home page at any time by clicking on the **Home** link on your top navigation bar or a bread crumb link offered above your left navigation bar (when available).The Home page makes several items readily available to you, such as your project's reference models and searches, your reports and your subscribed assets. From this page you can:

- View the reference models available to your active project and begin model navigation.
- View searches that currently exist for your active project, display search details and run the search.
- Create a new search.
- View reports available to you.
- View your subscribed assets and display asset information pages.

Home page Contents

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Custom Searches

If your library is configured with one or more custom searches, then the first custom search found in the library configuration which contains no parameters (requires no input from the user) will be shown on the home page. The name of the custom search is shown as the panel heading. If no parameterless custom searches are found, this panel is not shown.

Models

The icons representing the reference models for your active project are included here.

You can click on a reference model icon to begin navigating the model.

Searches

This section includes a list of saved searches. Asset Queries, Search box, Custom Searches, and Model Based Searches are included in this list.

You can click on the name of a search to display its specification, enabling you to modify and/or run the search. Click the **[Run]** link to execute the search. To create a new Asset Query specification for your active project, click on **[Create Asset Query]**.

Each search may have an "alert" icon to the left of its name. This icon indicates that you have elected to receive email notification when newly published or republished assets meet the criteria of the search. This designation is specified or removed on the search specification detail page.

Reports

This section displays a list of reports for your active project. The **[Manage Reports]** link enables you to manage your report entries.

You can click on the report name link to display or run the report in your browser window, depending on your reporting configuration.

Note: Your application provides you with a set of "pre-loaded" reports that may be available to you on the Reports page described above. Please see the section on Standard Reports in the Default Library Configuration for more information. If these reports are not included on your Reports page, contact your System Administrator for more information.

Subscribed Assets

This section displays a list of your subscribed assets. The Subscribed Assets page also provides an **[Unsubscribe]** link and the ability to unsubscribe from multiple assets at once.

You can click on an asset name link to display the published asset information page of a subscribed asset.

Subscribed Discussion Topics

This section displays a list of your subscribed discussion topics. The Subscribed Discussion Topics page also provides an **[Unsubscribe]** link and the ability to unsubscribe from multiple topics at once.

You can click on a topic name link to display the topic detail page.

Library Roles

Your work in the library is controlled and supported by the roles you are assigned. Roles assigned to your user account determine what you view on the screen, what e-mail notices you receive as a result of library activity, and what types of library functions are available to you.

There are two types of role assignments that can be made to your account: user roles and group roles.

- User roles are assigned to you at the user level. These roles apply to your account library-wide and are not scoped by group or project.
- Group roles are assigned to you for one or more groups in your library's group hierarchy. A group role assignment scopes the responsibilities associated with the role to the work related to that group and any groups subordinate to it in your library's group hierarchy. Group roles may be assigned to either project or non-project groups.

Library Role Creation

Your library provides a set of predefined (standard) roles which are described in the User Roles and Group Roles sections below in this document. In addition, your library configuration may include some additional (custom) roles specific to your library.

When a new library is created, it includes some custom roles by default in addition to the standard roles. Library Administrators can modify the default custom roles and create new custom roles as needed for your library. Custom roles enable the use of role names specific to your organization and the library-related duties to be performed. The general areas where custom roles are used include:

- Review and approval responsibilities related to asset production and asset consumption.
- Asset details presentation for viewing published asset information. See section below.
- Asset metadata element edit availability when editing assets in progress. See section below.

See your Library Administrator for more information about library role configuration.

Library Role Assignment

Roles are assigned by users assigned one of the following roles: Usage Controller or Project Manager (if supported by your library configuration). Each library has one or more Usage Controllers who are responsible for establishing the working environment of your library. In addition, each project has one or more Project Managers that may optionally be responsible for assigning users to their project and giving them roles applicable to their responsibilities for that project.

Role-based Asset Presentation - Asset Viewing and Asset Editing

Asset metadata elements and asset properties included in your view of an asset may be determined by your role assignments. If your library is configured for role-based asset views:

- The classifier, asset relationship and asset artifact values displayed on a published asset's information may be based on a role you are assigned relative to the project that is active at the time. The asset detail view corresponding to your role can determine which asset information you see and the order in which it is presented. See Asset Information for more information.
- If you are an Asset Capture Engineer, the artifacts, classifiers, relationships and asset properties included on asset edit pages will be based on the one or more group roles you are assigned for the owning group of the asset. These role assignments can be used to determine which asset metadata elements are available to you for edit and which asset properties are displayed on your asset edit page. See Asset Editing for more information.

Role-based asset views are not supported for the Usage Controller and Library Administrator roles.

User Roles

Roles assigned at the user level:

- Asset User -- Performs asset searches and researches assets of interest. Requests the acquisition of assets desired for their assigned project. Assets are researched via:
  - artifacts and other metadata elements which comprise the asset
  - asset discussion forums
  - asset subscription
  - other
- Library Administrator -- configures the library, which includes:
  - establishing the library's global asset definition and capture templates.
  - establishing the library's process configuration, custom roles, role-based asset views, etc.
  - other

Group Roles

Group roles are assigned to a user at a specific group level. Standard group roles are described below. Additional custom roles may be configured for your library.

Roles assigned by group include:

- Asset Capture Engineer -- creates assets in your library's asset source and submits them for publish.
  - captures asset metadata and artifacts through use of a variety of interfaces.
  - loads this information into the asset source.
  - submits an asset for publish.
  - maintains assets as necessary throughout their lifecycle, submitting them for republish or delete as needed.
  - Requests asset-based acquisition, if supported by library configuration.
- Publisher -- maintains and uploads asset publish templates and asset publish information.
  - Uploads publish templates to the library to facilitate automatic publish.
  - Creates and/or maintains asset publish information for the asset.
- Asset Owner -- may be involved in approving the acquisition of assets for projects, depending on your library process configuration.
- Project Manager -- Project managers can manage the users participating on their project and may also be involved in asset acquisitions requested by project participants, depending on your library process configuration.
  - can add or remove users from participating on their project and can assign or remove standard or custom group roles for project participants.
  - optionally may be asked to control the acquisition approval process for their project(s).
  - can create report entries that make reports available to the project's assigned users.
- Usage Controller -- Establishes the library work environment, including:
  - creating and updating user accounts
  - managing the "Repository Application" user account

- defining and configuring projects and workspaces
- setting up the group hierarchy
- assigning user and group roles
- managing classification criteria sets
- managing access to assets in progress
- managing asset requests (for publish, delete, acquisition or revocation approval)
- managing asset views and profiles
- managing acquisition relationship contexts for assets requested
- other

Asset Capture Engineer Role

The Asset Capture Engineer role is assigned to users who are responsible for creating assets, submitting them for publish to the library and updating them as necessary. As an Asset Capture Engineer, you may also be enabled to import assets into your asset source from a registry external to your library. See your Library Administrator for more information on the registries available to your library.

If you are an Asset Capture Engineer, you can perform your duties via:

- Your web browser application.
- Various plug-in or add-in applications, such as the Repository Client application, the Akana® Plug-ins for Eclipse or IBM® Rational® Software Architect, Akana Microsoft® Visual Studio® add-in, and others.
- Automation Extensions, which enables you to automate the process of bulk asset capture and update.

About Asset Capture Engineers

The Asset Capture Engineer group role is given to users who have the responsibility of creating and maintaining assets in the asset source of your library.

Asset Create

New assets are created through your choice of applications or tools, as listed above, and placed in your library's asset source. The asset is assigned an owning group by default, based on the owning group you chose for the last asset you created. Once created in the asset source, an asset is available to you and all other Asset Capture Engineers responsible for the group's assets as an asset in progress. However, while you are working on an asset, it is locked for your edits only until you either explicitly unlock it or submit it for publish. While the asset is locked for your use, it is not available for edit by other Asset Capture Engineers.

Once you consider an asset to be complete, submit it for publish. The asset will then be published upon receiving the necessary approvals established for this asset in your library.

Asset Import

Your library may be configured to support the import of assets from a registry external to your library. If so, you can initiate this action by choosing the **Import Assets** item in the Production section of your left navigation bar. Imported assets are brought into your library's asset source as assets in progress. You can choose whether or not to submit them for publish as they are imported. Imported assets will be subject to the same submission approval processes (if any)as assets created by other means.

Asset-based Acquisition

If your library is configured to support asset-based acquisition, a user must have the Asset Capture Engineer role assigned for an asset in order to request the acquisition of another asset on its behalf. See acquiring an asset using asset-based acquisition for more information.

Asset Capture Engineer Tasks

Asset Capture Engineer tasks specifically include:

- Creating an asset
- Importing assets from an external registry, such as a UDDI registry or others
- Completing an asset's information and submitting it for publish
- Updating an asset as necessary and submitting it for republish

- Requesting the acquisition of an asset for an acquiring asset

Collaboration with Others

Your application supports collaborative efforts in completing and updating assets:

- Assets are created and saved to the library asset source.
- Each Asset Capture Engineer has a view of the assets they can edit in their library's asset source in their assets in progress lists. For example, your assets in progress list includes those assets that are owned by the groups for which you have Asset Capture Engineer responsibility.
- There may be multiple Asset Capture Engineers that have edit access to a particular asset. However, an asset can be edited by only one Asset Capture Engineer at a time. An Asset Capture Engineer can release the lock on an asset they have edited to allow another Asset Capture Engineer to have edit access to the asset.
- While you are working on an asset, it is considered locked by you and inaccessible to edit by others. You can explicitly unlock an asset. An asset is also unlocked when you submit it for publish, once action has been taken on the corresponding submission request.

Publisher Role

The publisher role is assigned to users who are responsible for making assets available to library users by publishing them to the library. You can be assigned the publisher role specifically for one group or multiple groups. As publisher for a group, you have the responsibility to upload publish templates to control the automatic publish of assets. You can also update the publish information that is published with the asset metadata, such as private artifact designations. In some cases, you may be responsible for manually publishing an asset.

Prior to being published, the information of a new asset or the updated information of a previously published asset resides in the asset source of your library. These assets or asset updates are not available to asset users until published.

Publish Method

Asset publish can be automatic or manual. The method of publish is determined by the publish template associated with the asset's owning group for the type of asset being published. As publisher, you can upload publish templates to the library so that a library usage controller can associate them with the applicable owning groups and potentially specific asset types.

If the publish template in effect for an asset designates automatic publish, the asset is published once it has received approval from the user or users with the roles designated by the asset's submission process. In this case, the publish information for the asset is provided from the publish template.

If manual publish is indicated for an asset, the submission of the asset for publish by the Asset Capture Engineer results in a pending requests added to the pending request list of the user or users with the roles designated by the asset's submission approval process. Once these approvals are received, pending requests are generated for the Publisher(s) responsible for the asset's owning org group. In this case, the publish must be accomplished manually and the publish template may or may not provide the publish information to be used for the asset.

Asset Republish

Asset republish can also be designated to be automatic or manual. Similar to the process of the initial publish of an asset, the publish template in place for the asset's owning group (and potentially the asset type) determines whether a republish to update asset information is automatic or manual. Manual republish requests become a pending request to the publishers responsible for the asset's owning group once any required asset submission approvals are received.

Publisher Tasks

Publisher tasks specifically include:

- Upload publish templates to the library.
- Update asset publish information as required.
- If manual publish is designated by publish template for an asset:
    - Select an asset appearing in your Pending Request list.
    - Complete the asset publish and contact information.
    - Publish the asset.
- Republish a published asset, if manual republish is designated.

Usage Controller Role

A Usage Controller establishes your library's groups, work environment settings, and the group and user associations which support library use. For example, if you have the Usage Controller role, you can create groups and projects. In addition, you can create profiles and asset views and associate them with the groups or projects desired. Usage Controllers can create new library users and designate their role assignments. Each library may have multiple Usage Controllers. The first user created for a new library is automatically assigned the Usage Controller role for the Enterprise Group.

About Usage Controller

When a library is created for your enterprise, groups, projects, role assignments and other items need to be defined, configured and maintained to support library access and usage. These are largely the responsibility of a Usage Controller.

A Usage Controller is responsible for establishing projects to support asset users' search, research, and acquisition of assets. The Usage Controller also creates and maintains non-project groups and user accounts. After determining the group hierarchy needed by the enterprise and defining it in the system, a Usage Controller will customize the library by creating various sets of information (such as profiles, asset views and templates) and associating these sets with the appropriate groups. In addition, a Usage Controller can serve as administrator for such things as locked assets, asset requests and asset acquisition relationship contexts.

Usage Controller tasks

Usage Controller tasks specifically include:

- Creating and updating user accounts for the library. The Usage Controller will assign each user the appropriate role, or roles, within the active administration group, so they can interact with the system in the appropriate ways. Note: In addition, Project Managers may also be able to create new library user accounts for the purpose of adding these new users to their project. See Project Manager Role for more information.
- Managing the reporting group assignment for the system's Repository Application user. The Repository Application user account may be used for things such as providing the account recorded as the "submitter" of assets produced by automation scripts or for use as the "responsible user" identified for Visible Asset Sources or Remote Asset Sources established for your library. In both of these example uses of the Repository Application account, the Reporting Group assigned to this user provides a means of establishing the owning group for the assets coming into your library's asset source, and also to determine the publish templates to be used for the publish of these assets. See your Library Administrator for more information.
- Create and maintain groups. Establish the location for a new group within the active administration group hierarchy, and determine whether or not it should be designated as a project. Designate users for Asset Capture Engineer, Publisher, Project Manager group roles and any custom roles as applicable. Users who are Project Managers can also assign some types of roles to the users assigned to their project. See Project Manager Role for more information.
- Define and maintain the sets of classification criteria that can be used to filter assets for searching, UDDI publishing, library federation, etc.
- Establish and maintain contacts. Contacts for your application may be maintained for your installation by the Usage Controllers in each of its libraries.
- View assets in progress and perform an "unlocking" operation when necessary to manage access to assets in the asset source.
- Manage requests associated with the library's governance process for asset production, asset deletion, asset acquisition and asset registration revocation and perform request maintenance when necessary.
- View asset Relationship Contexts and perform context maintenance when necessary to manage contexts for revoked asset acquisitions.

- Create profiles to specify asset filters and asset tree sort classifiers and associate each profile with the appropriate group or groups.
- Determine which projects should see which groups of assets in the library, and establish the appropriate asset views and profile settings.
- Delete search specifications that are no longer needed.
- Manage project status between active and inactive.
- Manage user roles, account settings, and status as necessary.

Asset Owner Role

An Asset Owner is responsible for these primary tasks:

- taking action on acquisition requests submitted by project participants, depending on your library's acquisition governance configuration
- taking action on other types of approval requests, depending on your library's governance configuration for acquisition revocation, asset submission and asset deletion processes
- removing asset-specific forum topics and/or replies as necessary. (Note: Forum maintenance is a responsibility shared with Publishers responsible for the asset.)

Depending on the groups you have been assigned as Asset Owner, you may have responsibility to take action on acquisition requests (or other types of requests) for assets acquired by group projects or assets owned by the group and its subordinate groups. For example, your library configuration may designate that as an asset owner assigned to example *Group A* you will receive acquisition requests submitted by project users for the "Service" assets owned by Group A and any groups subordinate to Group A.

Performing Asset Owner Tasks

A list of your pending requests is available to you by clicking on the **Pending Requests** item in your left navigation bar.

If you are assigned the Asset Owner role for for one or more groups:

- You will receive email notification of requests pending your approval.
- Your Pending Requests list will include all requests awaiting your action.
- You will have delete links corresponding to asset-specific forum topics and replies for the assets owned by your asset owner groups, enabling you to remove topics and replies as necessary from the asset's discussion forum. See Asset Specific Discussion Forum for more information.

Asset User Role

All library users have the role of asset user. As an Asset User, you interface with your library for the purpose of locating, researching and acquiring assets for a project. Acting as an Asset User may or may not be one of your primary activities on the library. However, regardless of what other roles you are assigned, at a minimum you have the ability to locate and research assets in your own private workspace (which is also known as your private project). If your main responsibilities on the library involve asset capture, asset publish, usage controller duties or library administration, you may not be assigned as participant in any projects other than your private workspace.

Alternatively, if you use the library to locate assets and work with them in the context of your development responsibilities, you may be assigned projects in addition to your private project. You can switch between different projects as necessary to perform your duties for different teams and development initiatives.

About Asset User

As an Asset User you can perform various types of searches for assets in the library, conduct additional research on the assets found, collaborate with other Asset Users through search specification notes and asset discussion forums, and request acquisition of an asset for use on your project. Your application supports the following related tasks:

- Enables the location of library assets that meet specified criteria. Criteria can consist of various asset attributes like classifier values, names, keywords, etc. Criteria can also consist of reference function designed to match to the functionality found in assets published in the library, if there is a Reference Model configured to take advantage of this type of search in your library.
- Facilitates the research of assets you locate within the library. Research can take many forms,for example examination of asset artifacts, discussing the asset with others, subscription to the asset to be kept informed of updates, etc.
- Associates assets with your project and also potentially an asset(s) produced by your project via the acquisition request cycle.

Active Project

At any point during your library session, one and only one of your projects will be active. Your active project can be your own workspace or one of the shared projects you're working on. Your home page, asset searches and asset acquisition work is conducted within the context of your active project. You can switch between multiple projects as necessary. Note that the assets you see in your asset tree, as well as those available for searching, are scoped by your active project and its associated profile settings. Any searches you save are associated with the active project and any asset acquisition requests you make are attached to your active project.

Upon logging in, your active project is initially set to be the project designated as your default project. You can change to a new active project by using the corresponding link in the Consumption section of your left navigation bar. You can also choose to make a different project your default project by going to the new default project's detail page and clicking on the corresponding link.

Active Asset

If your library is configured to support asset-based acquisition and your active project is set to a project that is associated with one or more assets designate this project as their context project, you will need to set your active asset to designate the acquiring asset in order to begin the asset-based acquisition request process. At any point during your use of a library set to allow asset-based acquisition you may or may not have an asset set to active, depending on whether your currently active project has associated production assets and if so, whether you have yet selected an active asset for that project.

Once you have designated an active asset for your active project, this asset remains the active asset for that project until you change it. You can switch between active assets as necessary by clicking on the corresponding **[Change]** link. Note that the assets available for selection as the active asset for a project are all assets, whether published or not, that have designated the project as their "context project" in the identifier metadata of the asset.

Upon logging in, an active asset may be designated or not depending on the active project or workspace you have established as the default project and also whether you have designated an active asset for that project.

Asset User tasks

Tasks you can perform as an asset user:

- Use the Search Box to locate assets by name criteria.
- Prepare and run Asset Query Specifications to locate assets by name and/or classification criteria. See About Asset Query for more information.
- Prepare and run Model Based Search Specifications to locate assets by classification criteria. See About Model Based Searching for more information.
- Review the Search Result list page displayed from an asset search, which shows the library assets that meet the criteria given.
- Research found assets through the asset name links on the result list page.
- Request acquisition of desired assets for use with the project.

Collaboration with Others

Your application supports collaborative efforts in finding and researching library assets.

- When locating library assets you may create a search specification, which enables you to save the criteria used in your search and keep track of assets you find for future work.
- In addition, you can participate in the discussion forum for any particular asset. Asset discussion forums are associated with the asset they relate to, not to a specific project. By using the asset discussion forum, you can talk with all other library users that have an interest in the asset.
- Subscribing to an asset you are interested in enables you to keep informed of updates to the asset or new versions of it as they are published.

Project Manager Role

A Project Manager manages the users participating on the project, which are called participants. For example, a Project Manager can create new users and add them to the project, add or remove roles to the user account and be involved in asset requests for the project. They are also involved in creating report entries for project participants and may be involved in approving assets requested for the project.

About Project Manager

When a project is created by a Usage Controller, it is assigned a Project Manager from a list of library users (users who have accounts in the library). Like other organizational group roles, you are assigned to be a Project Manager for one or more specific projects. Note: each project must have at least one Project Manager, and optionally can be assigned more than one Project Manager. Additional Project Managers can either be assigned by the Usage Controller or another Project Manager on the project. They are selected from a list of users who have already been assigned to the project.

If you are assigned the role of Project Manager for a project, you have the capability of assigning and managing users on your project as participants. In fact, you can create library user accounts for new participants as needed, according to your library's user authentication configuration. (See About Library Access for more information.) In addition, you have the responsibility to respond to requests made to acquire assets for use on the project. This responsibility is shared with other Project Managers, if any, on the project.

It is optional for the Project Manager to be required to approve asset acquisition requests from the project users. If the project is configured to require a Project Manager's approval for assets requested by project participants, each request will be available for the project's manager(s) approval or rejection. If not, the Project Manager(s) have the primary responsibilities of managing project participants and participant report entries. However, they retain the ability to unapprove assets once they are registered to their project.

As Project Manager, you can create report entries to enable access to a specific report for all the project participants as a group. In addition, as Project Manager you are able to perform all the same tasks for the project as all other project users.

Project Manager tasks

Project manager tasks specifically include:

- Manage the project participants by adding or removing users from the project as necessary
- Manage the roles of project participants by adding or removing the Asset Capture Engineer, Publisher and/or Project Manager role for users on the project.
- Respond to each request to acquire an asset for use on the project (if required by the project configuration)
- Review notes made to assets acquisition requests.
- Unapprove assets registered to the project as necessary.
- Create report entries to be available to all project users.

Library Administrator Role

A Library Administrator is responsible for four primary tasks: maintaining the configuration of your library, managing your library's Global Definition Template, configuring and managing the library audit trail and removing general discussion forum or asset-specific forum topics and replies as necessary. The Library Administrator role is initially assigned to the first user created for your library. This role is not scoped by group.

About Library Administrator

In general, if you are a library administrator, you will carry out most of your tasks from the Support Center page. In addition, it is recommended that all Library Administrators also hold the Usage Controller role for the Enterprise Group, enabling them to assign the Library Administrator role to other users as necessary (the initial Library Administrator for a new library is automatically assigned the Usage Controller role for the Enterprise Group). Note: your System Administrator has access to the initial Library Administrator account for your library, as mentioned above.

Library Administrator Tasks

If you are assigned the role of Library Administrator:

- You will have a Library Administrator-specific section on your support page that enables you to perform the following tasks. See Support Center - Library Administrator Tasks for more information.
  - Maintain library configuration information
  - Manage your library's Global Definition Template.
  - Configure and maintain your library's audit trail and events.
- You will have an **Administration** link in your top navigation bar. See Top Navigation Bar for more information.
- You will have delete links corresponding to topic and replies in both the general discussion forum and asset-specific forums for your library, enabling you to remove topics and replies as necessary. See General Discussion Forum and Asset Specific Discussion Forum for more information.

Custom Roles

In addition to the standard roles of your application, there may be additional roles that are customized for use in your library. For example, if your library is configured to use custom governance processes, there will be one or more custom roles associated with each process. These roles are named and configured according to your organization's requirements or preferences. For example, custom roles are used to assign responsibility for working with requests generated by the governance processes of your library. In addition, custom roles can also be assigned to determine the details provided for asset viewing or asset editing. The default library configuration of your library provides a number of "custom roles" that may be used.

Custom roles created for your library are assigned to users by group. As with standard roles, custom roles are assigned to your user account by a library user who has the role of Usage Controller, or in some cases by a Project Manager. Custom roles are included in the list of roles available for assignment on the group, project and user detail pages.

See your Library Administrator for more information about Library Configuration.

Setting up and Maintaining the Library

There are two administrative roles assigned to users in your library that are involved with establishing its configuration and settings and maintaining its work environment.

These roles are Library Administrator and Usage Controller. In addition, the Project Manager role shares some of the user management capabilities of a Usage Controller although scoped to their assigned project only.

Default Library Configuration

Each new Lifecycle Manager library has various default settings put in place to facilitate library configuration. These settings will be reflected in your library unless they are purposely overridden. For example, default asset types are defined and associated with corresponding capture templates, useful custom roles are defined, and approval processes are configured for asset production governance and asset consumption governance. This document provides detailed information on the default settings that may be in use by your library:

Asset Types and Templates

Primary Asset Types and Capture Template Associations

These are the primary asset types defined by default for your library. Each is listed along with its associated capture templates, which are also defined in the default configuration and associated with the corresponding asset types. The default configuration also defines specific roles which are required to create various types of assets. Please see the reference documents for Capture Templates and the Global Definition Template available in your web browser application on-line help for more information about how templates are used to define asset metadata.

Primary Asset Type	Associated Capture Templates	Roles Required for Asset Creation
API An interface specification which provides a way for software components to communicate with each other.	• API - Specified	• Service Developer
API Access Represents extended contract data created through a governance API.	• API Access – Base • API Access – Default	
Application Defines a software application. This asset type is used to record assets that consume services or are used by services to expose functionality for impact analysis purposes.	• Application - Specified • Application - External	• Application Developer
Community Manager Tenant Defines information that represents a Community Manager tenant.	• Community Manager Tenant - Specified	• Architect
Knowledge Defines documentation-based information such as standards, guidelines, best practices and lessons learned.	• Knowledge - Specified	• Architect
Legal Agreement An agreement that typically pertains to API usage	• Legal Agreement - Specified	• Business Analyst

requirements, end-user licensing, limitations, liability, and service level expectations.		
Runtime Configuration A set of technical policies.	• Runtime Configuration - Specified	• Architect
Schema An outline or model that defines the structure of objects like web services or databases.	• Schema - Specified	• Architect • Service Developer
Service Defines a common business or technical function that is exposed through a network-addressable interface.	• Service – Deprecated • Service – Design Complete • Service - Development Complete • Service – Imported • Service – Planned • Service – Production • Service - Requirements Complete • Service – Retired	• Service Developer
SOA Reference Model Provides a visual representation of the functionality provided by assets in your library.	• SOAReferenceModel	• Architect
Software Component Software that implements a set of related functions.	• Software Component - Production • Software Component - Proposed	• Application Developer • Service Developer
Technical Policy A rule that is used to restrict how a service can be used.	• Technical Policy - Specified	• Architect

Custom Roles

In addition to standard user and group roles, the default configuration includes custom roles. This table lists the custom roles by name and provides information about how they are used in the default configuration.

Custom Role	**Purpose for Role in Default Configuration**
API Product Manager	• Used to assign governance responsibilities for the API Access submission process.

Application Developer	• Creates and maintains Application and Software Component assets.
Architect	• Creates and maintains Knowledge, Reference Model, Technical Policy, and Runtime Configuration assets. • Used to assign governance responsibilities for the asset submission process. • Used to assign the *Technical Information* asset metadata view to appropriate users.
Business Analyst	• Used to assign the *Business Information* asset metadata view to appropriate users. • Used to assign commenter responsibilities during the service submission process.
QA Lead	• Can make changes to Service assets related to test information during the Design Complete and Development Complete states. • Used to assign the *QA Information* asset metadata view to appropriate users.
Repository Administrator	• Used to assign governance responsibilities for the asset deletion process.
Security Architect	• Used to assign governance responsibilities for the asset submission process.
Service Developer	• Creates and maintains API, Schema, Service, and Software Component assets.

Approval Processes

There are four primary workflow processes related to governance that are configurable for your library. These include the processes of submitting an asset for publish, deleting an asset from the library, acquiring an asset, and revoking the registration of an asset. Information related to the default process configurations is provided below. In addition, the notifications triggered by each and the properties associated with each type of request are provided.

Application governance processes are defined in the Library Configuration document for your library. This document is managed by your Library Administrator. For more information about library configuration related to approval processes, please see your Library Administrator.

Some of the workflow processes in the default library configuration require integration with an instance of Policy Manager or Community Manager. The default configuration will need to be tailored to your unique Policy Manager and Community Manager installation setup before attempting to use assets that take advantage of these integration features.

Asset Submission for Publish

Assets submitted for publish qualify for a governance requirement if their *Certification Level* classifier value is set to anything other than *Project*.
API Access assets are governed when their status classifier is set to *Specified*. *Community Manager Tenant* assets do not have a governance process.

For most asset types, a user assigned the role of Architect must take action to approve (or reject) the request resulting from the submission of an asset that requires approval for publish. Submission of *API Access* assets require approval by a user assigned the *API Product Manager* role.

The active asset capture template may be changed to reflect the asset's updated status.

Email notification:

- The user submitting the asset for publish is notified that their request requires approval.
- For most asset types, users assigned the role of Architect who are responsible for the group owning the asset are notified the request is pending approval. In the event there isn't a user assigned as Architect for the submitted asset's owning group, an email will instead be sent to all users with the role of Usage Controller for the asset's owning group.
- Users assigned the role of Business Analyst for the group owning the asset are notified the request is pending approval for certain asset types (Service assets in Requirements Complete status and Software Component assets in Proposed status).

Service assets go through additional processing:

- Assets in Design Complete and Development Complete status invoke a Policy Manager WSDL validator. The validator tests each target artifact against the compliance rules setup for the Policy Manager organization corresponding to the asset's owning group. Submission requests for services in Design Complete state may require additional approval by a user with the role of Security Architect, depending on whether the asset is marked for additional role-based compliance policies related to the PCI classifier.
- Services that reach a state of Design Complete are published to Policy Manager, and subsequent updates to the asset status trigger Policy Manager update notification.

API assets are published into Community Manager.

API Access assets invoke a REST operation on a federated Community Manager system, to approve or reject the request.

Application assets that are supplied by Community Manager are referred to as *external* applications. When external applications are submitted for publish, no special steps are performed other than locking the asset. Publishing the asset makes the Community Manager application visible to Lifecycle Manager.

Request Properties:

Asset submissions that require approval by an Architect trigger a request which may include the following properties:

- Certification Level Approved (required)
- Review Comment

Asset Submission for Delete

For most asset types, an asset submitted for delete qualifies for a governance requirement if its *Certification Level* classifier value is set to anything other than *Project*. A user assigned the role of Repository Administrator must take action to approve (or reject) the request resulting from the submission of an asset that requires approval for deletion. Email notification is sent as described below.

Email notification:

- The user submitting the asset for delete is notified that their request requires approval.
- Users assigned the role of Repository Administrator who are responsible for the group owning the asset are notified the request is pending approval. In the event there isn't a user assigned as Repository Administrator for the submitted asset's owning group, an email will instead be sent to all users with the role of Usage Controller for the asset's owning group.

API assets submitted for delete are removed from Community Manager.

Service assets submitted for delete are removed from Policy Manager.

Asset Request for Acquisition

Certain asset acquisition requests trigger a governance requirement:

- When the following types of acquisition requests are made, several levels of approvals are required:
    - A Service asset acquires another Service
    - An Application asset acquires a Service
    - A Software Component asset acquires any other type of asset

For acquisition requests requiring approval, a user assigned the role of Project Manager for the requesting (consuming) asset must first take action to approve or reject the acquisition request.

If the acquisition request was approved by the Project Manager, the request is next assigned to users given the role of Asset Owner for the owning group of the asset. The Asset Owner must then approve or reject the acquisition request.

When a Service is acquired by an Application or another Service, a consumer contract is generated in Policy Manager which corresponds to the acquisition request.

Email notification:

- Users assigned the role of Project Manager who are responsible for the consuming asset are notified the request is pending approval.
- Once the request is approved by a Project Manager, users assigned the role of Asset Owner for the asset's owning group are notified the request is pending approval.
- All projects have at least one Asset Owner. However, in the event there isn't a user assigned as Asset Owner for the requested asset's owning group, an email will instead be sent to all users with the role of Usage Controller for the asset's owning group, once the request has been approved by a Project Manager.

Asset Submission for Revocation

Assets submitted for revocation require a user assigned the role of Project Manager to approve (or reject) the request.

Service assets that hold a contract with Policy Manager will trigger a request to revoke the contract.

Email notification:

- Users assigned the role of Project Manager who are responsible for the group owning the asset are notified the request is pending approval.

Publish Template

A default publish template is defined for your library. Please see the publish templates reference document for information on how publish templates are used in the asset publish process and for the contents of the default publish template.

Role Based Asset Views

The application default configuration identifies several views of asset metadata: *Default*, *Business Information*, *Empty View*, *QA Information*, and *Technical Information*. The user role assignments required to access each of these views, and the list of classifiers, artifacts, and relationships included in the view are defined in your library's Library Configuration Document (LPC). For more details, contact your Library Administrator. See asset information for more information about role-based asset views.

- Default - Provided to all user roles when viewing published assets, and provided to Application Developers, Architects, Repository Administrators, and Service Developers when editing assets in progress

- Business Information - Provided to users with the role of Business Analyst when viewing published assets
- Empty View - Provided as the default view for all user roles when editing assets in progress; overridden for each role to assign a suitable edit view
- QA Information - Provided to users with the role of QA Lead when editing assets in progress
- Technical Information - Provided to users with the role of Architect when viewing published assets

Library Configuration - Library Administrator

Your web browser application provides the means for you to customize various aspects of your library and its behavior. In general, this is referred to as library configuration. Managing the configuration of a library is the responsibility of a user assigned the role of Library Administrator.

Library configuration may be performed through use various mechanisms, including:

- Akana® web browser application.
- Configuration Designer plugin for Eclipse - for more information on Configuration Designer, please use the Downloads link from your top navigation bar to gain access to the Configuration Designer plugin or the Repository Client. Once installed, Configuration Designer provides a help system via the main application menu: Help > Help Contents > Library > Configuration Designer. Context-sensitive help is also available by pressing the F1 key while positioned on one of the Library Configuration Editor tabs.
- Direct edit of the Library Configuration Document with an XML editor, such as the Eclipse editor available when using Configuration Designer. For more information on editing the Library Configuration Document, please see your Library Administrator to obtain a copy of the Library Configuration Guide.

Aspects of Library Configuration

Library configuration can involve a number of different aspects of your library and how it operates. In the following list, each aspect is described and information provided regarding the application to be used for the configuration and the role(s) needed.

- **Asset Definition** - Modifying the Global Definition Template and related Asset Capture Templates to designate asset types, asset metadata, constraints corresponding to each metadata element, etc. The asset definition of a library is primarily configured using Configuration Designer by a user with the Library Administrator role. For information on accessing the Configuration Designer, use the Downloads link from your top navigation bar as described above.
- **Role Definition** - Defining new or modifying existing custom roles used in your library and designating how the roles will be used in process governance and/or indicating which asset metadata and property elements are viewable and/or editable by specific user roles. Custom roles are defined using Configuration Designer by a user assigned the Library Administrator role. Roles are assigned to users by a Usage Controller or Project Manager using the web browser application. For information on accessing the Configuration Designer, use the Downloads link from your top navigation bar as described above.
- **Process Definition** - Process definition involves designating approval processes and pre-governance/post-governance tasks as well as the roles to be involved and the filter conditions that must be met. Process definition is maintained by using Configuration Designer. For information on accessing the Configuration Designer, use the Downloads link from your top navigation bar as described above. Four core library processes are available for process definition:
    - asset submission for publish
    - asset deletion
    - asset acquisition
    - revocation of asset registration
- **Activity Definition** - Activity definition refers to configuring the accessibility of various functionality to library users, such as asset acquisition, revocation and relationship context update. Activity definition is maintained by using Configuration Designer. For information on accessing the Configuration Designer, use the Downloads link from your top navigation bar as described above.
- **Definition and Use of Custom Properties** - custom properties can be defined for the library entities of user, group, project, asset, request, etc. Properties are used for gathering, displaying

or holding information related to these library entities, the request approval process or to support algorithms used with the automated systems established for your library. Use Configuration Designer to define and modify properties and their use. For information on accessing the Configuration Designer, use the Downloads link from your top navigation bar as described above.

- **Custom Event Processing** - You can create custom processing for your library and make it available to library operations through use of the Repository Client application. Custom processing may be designed to be triggered by internal library events or by events produced by an external system. Please see your Library Administrator for more information on custom event processing.
- **Integration with External Systems** - You can integrate the content and processing of your library with other systems used in your environment. For example, you may find it useful to import asset content from your SCM or run-time registry, to update asset content in your library based on an external system or vice versa, to synchronize asset data between two systems on an on-going basis or to provide library asset artifacts by referencing items in an SCM system, etc. Please see your Library Administrator for more information on how to establish necessary integrations.

Library Configuration with the Web Browser Application

If you are a Library Administrator, some aspects of library configuration can be accessed using the web browser application. Click on the **Support Center** link available from the top navigation bar of your application. The page displayed as a result has a section for Library Administrators with two links, enabling you to change general library configuration and audit trail configuration. See the Library Administrator section of the Support Center page for more information.

Audit Trail Events

There are over one hundred and fifty types of events that occur in the operation of your library. These events are triggered by normal operations and through configuration related activities. Events are recorded as they occur into what is called your library's "audit trail" for tracking and reporting purposes.

Audit trail events are recorded into a set of database views. By accessing these views, you can obtain information about events that have occurred during the time frame tracked by your audit trail. You can create reports in order to access audit trail information and provide information to application users and others on events of interest. The output of these reports can be made available to library users through the web browser application and to non-library users outside of the application at your discretion.

You also have the option to develop a custom "listener" for a designated event as a means to incorporate custom code to interface with the application, thereby extending application functionality. The listener can be used to trigger the execution of the extended code upon the occurrence of an event instance.

If you are a System Administrator, information about events that are available to include in your audit trail can be displayed by executing a command from your System Administrator console. In addition, if you are a Library Administrator, you can configure which events you wish to record in the libraries audit trail from your Support Center page.

For More Information

Audit Trail Configuration -- If you are a Library Administrator, you have a link on your Support Center which enables you to filter the events that are recorded and the duration of their persistence.

Custom Event Listener Sample -- please contact support@akana.com for more information on how to obtain this external sample which illustrates how custom behavior may be added to automatically trigger asset submission based on a particular state of an asset.

Reporting -- See the Library Reporting section of your web browser application help system for more information.

System Administration Guide -- If you are a System Administrator for your installation, you can get to the System Administration Guide from your System Administrator Console menu. This guide contains information on the command for listing the available events and their properties.

Support Center page

This page displays the support information available to users of a library. There are two types of sections available on the Support Center page: those specific to your library roles and the sections that are available to all library users regardless of role assignments. You can display this page by clicking on the top navigation bar item for Support Center.

Support Center page Content

The Support page contains the following information and selections. Role-specific task sections are displayed only if you are assigned the corresponding roles.

Library Administrator Tasks

If you are a Library Administrator, your Support Center page will include a section with tasks related to library administration. As a Library Administrator, you can use this page in the following manner:

- Click on **[Configure Library]** to display the library configuration page which enables you to make changes or designations related to your library's current configuration.
- Click on **[Audit Trail Configuration]** to display the Audit Trail Configuration page enabling you to view or modify the events and severity levels logged by your audit trail and maintain the event log.

Asset Publisher Tasks

If you are a Publisher, your Support Center page will include a section specific to the Publisher task of managing publish templates. As a Publisher you can use this page to:

- Click on **[Manage Publish Templates]** to display the Publish Template Manager page enabling you add, remove or modify publisher templates. (Note: Publish templates must be associated with the project or group by a Usage Controller).

The Support page contains the following information and selections for all library roles:

Download Center

Click on the **Download Center** link in this section to display the Download Center, a page offering Download links and/or Installation instructions for various offerings.

Support Information

This section contains links to:

Access or authority contacts:

All Usage Controllers assigned in your library are included in this list. Each e-mail link enables you to send an e-mail to the corresponding Usage Controller. You would contact a Usage Controller with questions or problems associated with library, IDE integration tools access or authority issues.

Library configuration and library asset definition contacts:

All Library Administrators assigned in your library are included in this list. Each e-mail link enables you to send an e-mail to the corresponding Library Administrator. You would contact a Library Administrator with questions or problems associated with library configuration or your global asset definition.

Akana Contact Information

If you are a Library Administrator, this section contains links to the Akana support site. If you are not a

Library Administrator, this section contains the names and email links for the Library Administrators and Usage Controllers of your library.

Library Statistics

If you are a Library Administrator, this section contains library statistics.

- **Total Assets:** - Total number catalog assets
- **Published Assets:** - Total number of published assets
- **Projects:** - Number of active projects
- **Users:** - Number of total users
- **Active Requests:** - Number of Active Request
- **Pending Events:** - Number of Pending Request Events

Version

This section contains the brower application release number.

- **Version** - Is the major and minor release version numbers. Example: 6.4 --- 6 is the major version release and the 4 is the minor version release number.
- **Build** - Is the build and date of the version. Example: 11011 on Tue Oct 2 16:25:37 CDT 2012

View/Edit Library Configuration

This page displays the detail information of your library's configuration parameters. If you are a Library Administrator, you can display this page by clicking on the **[Configure Library]** link in the Library Administrator Tasks section of your Support Center page.

From this page you can:

- View and modify the description of your library.
- View and modify the e-mail address designated to serve as the sender address when messages are sent from your library.
- Choose which fields of information to include on the asset information pages available for assets in your library.
- View and modify your library's configuration setting for:
  - Controlled Access
  - Project Manager role authority
  - RSS Feed enablement
  - Open Artifact Retrieval enablement
  - Asset Acquisition Mode and related automatic submission of the acquiring asset for publish
- View and modify the feedback account contact information.

Library Detail page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Support Center

Click on this bread crumb link to return to the Support Page.

General Information

The unique name of your library is displayed to the right of **Library:**

Library Description

This field allows you to enter the full name for your library without abbreviation. This description is made available in your library's database reporting views.

Sender Email

When your library generates an e-mail, the sender e-mail address you enter here will be used to fill in the *from* field of the library-generated e-mail message.

Help URL

This field allows you to enter a custom URL of your company's help site in place of the default help site. When you click the **Help** link on the top navigation bar, you will be taken to the custom help website.

Discussion URL

You may already have a general discussion forum website set up for your company. This field allows you to enter the URL and direct users to the company discussion site if the **Discussion** link is clicked on the top navigation bar.

Asset Information Display

You have the option of displaying or suppressing the display of various fields of information about an asset in your library. These fields are typically displayed for a library asset on its asset information pages. Click on the **Yes** or **No** radio button corresponding to a field to alter the display parameter.

Show Submitter

Indicate whether or not you want to show the account name of the Asset Capture Engineer who submitted the asset for publication into the library.

Show Publisher

Indicate whether or not you want to show the account name of the Publisher who published the asset.

Show Owning group

Indicate whether or not you want to show the name of the group designated as owning the asset and receiving credit for each registration of the asset to a project.

Show Cross Charge Amount

Indicate whether or not you want to show the currency amount entered for the asset's cross charge amount. Cross charge amounts can be used (optionally) to measure an amount to be charged to groups associated with usage of the asset.

Configure Role Authorities

In this section of the library configuration page, you have options to set the level of authority provided to the role of Project Manager, as well as to indicate how account creation is governed.

Enable Controlled Access

Indicate whether or not you want to designate "controlled access" for your library.

- If your library is set for "controlled access" it means that when an authenticated user accesses the library URL and requests a library account, the Usage Controllers identified in your library will be notified by email. A Usage Controller must then perform the actual creation of the user account.
- If controlled access is *not* designated for the library, when an authenticated user requests a login, a user account is automatically created in the library. The new user account is assigned the role of asset user (only) and is given no project assignments. A Usage Controller for the Enterprise Group can optionally modify the new user account as required.

Enable Project Manager Authority to Create Users

Indicate whether or not you want to give users assigned the Project Manager role the ability to create new library users from their Project Detail/Add Project Participants Pages.

Configure RSS Feed Enablement

In this section of the library configuration page, you have ability to designate whether or not your library will offer RSS Feed access to the following:

- Forums
- Forum Topics
- Asset Searches

- Audit Trail

Enable Open Asset Artifact Retrieval

If you set this boolean designation to "Yes," you library will be enabled to allow asset users to display asset artifacts (which are included in an asset by reference to an external system) without presenting an authentication challenge.

Hide Governance Section

If your library is configured with no asset governance, you may choose to hide the Governance section in the left navigation bar.

Asset Comment Display Order

Asset comments can be defaulted to display either by oldest first or newest first.

Configure Asset Acquisition Settings

In this section of the library configuration page, you have ability to designate the asset acquisition mode available in your library. See Asset Acquisition About for more information. The first configuration setting provides three options for **Acquisition Type:**

- Asset - which supports the ability of an asset to acquire another asset through establishing a contextual relationship within the acquiring asset which targets the acquired asset.
- Project - provides for asset acquisitions to be established on behalf of a consuming project. (Note: This is the only type of asset acquisition available prior to version 6.2 of your application.)
- Both - provides the ability to support both asset-based acquisition and project-based acquisition in the same library. Note: it is recommended that a library not offer both types of asset acquisition unless there are clear requirements to do so.

The second configuration setting, **Publish Acquiring Asset On Acquisition Submission**, establishes whether or not an asset that is acquiring another asset is automatically submitted for publish upon the completion of the request to acquire. This configuration setting is only applicable when asset-based acquisition is enabled.

Feedback Account Information

The feedback account identified here for your library is used to provide the contact information used when a library user chooses to give feedback. A library user can click on **FEEDBACK** on the top navigation bar link to display an e-mail window populated with the feedback account information you have designated here. Messages will be delivered to this e-mail account. This section includes fields for:

Name

This field can contain the name of an individual, or a name that represents the purpose for this account. You can edit this information by clicking on the text box. This field is required, although the library does not currently use this field other than for display on this page.

Email

This field contains the e-mail address designated as the recipient for all feedback e-mail messages generated when a user clicks on the **FEEDBACK** link on their top navigation bar. You can edit this information by clicking on the text box. This field is required.

Buttons

When you are finished viewing and/or modifying the library configuration parameters, you can choose one of the following:

Save

Click on **Save** to record your changes and return to the Support page.

Cancel

Click on **Cancel** to return to the Support page without recording any changes.

Manage Global Definition Template

Your application enables Library Administrators to customize the asset schemas used by your library. To accomplish this, the Library Administrator works with an XML configuration document called the Global Definition Template. The Global Definition Template is used in conjunction with Asset Capture Templates (which are also XML configuration documents) to both define and constrain asset element types (classifiers, artifacts, and related assets).

The Global Definition Template for your library defines the superset of all classifier, relationship and artifact types used for the asset types in your library. The single Global Definition Template of your library must contain all the asset elements necessary to define all the individual asset types needed.

Using the Global Definition Template, you can define various "globally" applicable asset element attributes as well and specify any special behavior applicable to various types of elements. You can also designate valid values and applicable cardinalities, provide fly-over help text and designate presentation naming and default values for asset element types as desired.

As a Library Administrator, you will use the Akana® Configuration Designer application to modify the Global Definition Template and Asset Capture Templates for your Library. See the Downloads pages for information about obtaining the Configuration Designer Eclipse® plugin or the Akana Repository Client application.

Manage Asset Capture Templates

Your application enables Library Administrators to customize the asset schemas used by your library. Library Administrators work with XML configuration documents called asset capture templates in conjunction with the library's Global Definition Template to constrain asset element types (classifiers, artifacts, and related assets) and specify their use for specific asset types. Each asset capture template is used to define an individual asset type through use of the metadata elements available in the Global Definition Template. In cases where an asset type is associated with multiple lifecycle stages, each stage of the asset may have its own corresponding asset capture template specifying which elements and constraints apply to the asset type at that stage.

If you are a Library Administrator, you can use asset capture templates to build on the metadata element definitions in the Global Definition Template to further constrain asset element types (classifiers, artifacts, and related assets) as well as set valid values and applicable cardinalities to asset elements that are specific to the asset type/lifecycle stage. Further, you can provide fly-over help text and default values for asset elements that are specific to the asset type/lifecycle stage.

Asset Capture Template Usage

Asset Capture Templates are used during the creation of an asset and the edit of asset information. To create an asset, the Asset Capture Engineer is required to choose an asset type and a corresponding Asset Capture Template. The template selected is used during the creation and edit process to provide information and valid values as well as to govern the entry of information for the asset. The asset in progress is continually validated against its template during information entry and edit. Until the asset in progress validates successfully, icons indicating validation errors are displayed for each section of asset information that is incomplete. Hovering over the validation icon presents information about what is missing in that section. An incomplete asset cannot be successfully submitted for publish.

For asset types associated with multiple lifecycle stages, an asset is promoted to its next lifecycle phase by manually or automatically changing the capture template associated with the asset. The new capture template associated with the asset often provides additional requirements or constraints the asset must meet before it can be republished.

As a Library Administrator, you will use the Akana® Configuration Designer application to modify the Global Definition Template and Asset Capture Templates for your Library. See the Downloads pages for information about obtaining the Configuration Designer Eclipse® plugin or the Akana Repository Client application.

Audit Trail Configuration page

This page enables you to configure the various settings that make up the audit trail for your library. If you are a Library Administrator, you can display this page by clicking on the **[Configuration Audit Trail]** link in the Library Administrator Tasks section of your Support Center.

From this page you can

- Select the events that trigger an audit trail entry.
- Select the severity levels that trigger an audit trail entry.
- Configure the number of days before an old audit trail entry is removed.
- Subscribe to an RSS feed for audit trail events.

Audit Trail Configuration Page Contents

The Audit Trail Configuration page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Support Center

Click on this bread crumb link to display your support center page.

RSS Feed

Clicking on this icon enables you to subscribe to the audit trail, which will trigger notifications sent to your RSS reader.

Events

Selecting a checkbox next to an event or group of events indicates that you wish to have an audit trail entry associated with it. You may choose to **Include all Events** which will select all event checkboxes, or an event type to select all events of that type.

The events are divided into the following event types:

- Asset Events
- Acquisition Events
- Profile Events
- Search Events
- Miscellaneous Events

Severity Levels

Selecting a checkbox next to a severity level indicates that you wish to have an audit trail entry created when events of the selected severity occur. You may choose to **Include all Severities** which will select all severity checkboxes.

Audit Trail Maintenance

This feature when selected allows you to specify the number of days that an audit trail entry should be kept before removal. To configure the maintenance period, select the checkbox and enter a value for the desired number of days to wait before removal.

Buttons

Save

Clicking the **Save** button saves the selected audit trail configuration for immediate use.

Reset

Clicking the **Reset** button resets the page to the last saved audit trail configuration, erasing any selections that you may have recently made without saving.

Cancel

Clicking the **Cancel** button exits the audit trail configuration page and returns you to the Support Center.

View/Edit Audit Trail Configuration

This page enables you to configure the various settings that determine the events to be included in your library's audit trail. If you are a Library Administrator, you can display this page by clicking on the **[Audit Trail Configuration]** link in the Library Administrator Tasks section of your Support Center.

From this page you can:

- Select the event types that trigger an audit trail entry.
- Select the event severity levels that trigger an audit trail entry (Optional).
- Configure the number of days before an old audit trail entry is removed.

Audit Trail Configuration page Content

The Audit Trail Configuration page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Support Center

Click on this bread crumb link to display your support center page.

Events

Selecting a check box next to an event or group of events indicates that you wish to have an audit trail entry created each time this type of event occurs. You may choose to **Include all Events** which will select all event check boxes, or any event type to select all events within. Note: In addition to the event types you select in this section, your application uses the severity level settings you establish to further filter the events to be tracked. Event severity levels are described in the next section. For example, if you select an event type that does not qualify for the severity level(s) you choose to include, the event will not be tracked even if its event type is selected. See Audit Trail Event Details for more information on the severity level associated with each event type.

Events tracked by your application are divided into the following event type categories. See Audit Trail Event Details for more information on the events included from each of these categories.

- Asset Acquisition Events
- Asset Maintenance Events
- Asset Usage Events
- Asset Search Events
- Asset View Events
- Classification Criteria Set Events
- Forum Events
- Library Maintenance Events
- Miscellaneous Events
- Org Group and Project Events
- Profile Events
- Report Events

- Users Events
- Internal Events

Severity Levels

Selecting a check box next to a severity level indicates that you wish to have an audit trail entry created when events of the selected severity occur. This provides a means to further qualify the set of events you'd like to include in the event log. You may choose to **Include all Severities** which will select all severity check boxes and result in the recording of all event types you have designated in the Event Type section described above.

If you select an event type that does not have a severity level you have included in this section, the event will not be included. See Audit Trail Event Details for a list of event information, including the severity level of each event.

Audit Trail Maintenance

This feature when selected allows you to specify the number of days that an audit trail entry should be kept before removal. To configure the maintenance period, select the check box and enter a value for the desired number of days to wait before removal.

Buttons

Save

Clicking the **Save** button saves the selected audit trail configuration for immediate use. At any point before clicking on **Save**, you can click on **Reset** to return the values to where they were when you first entered this page or **Cancel** to abort any changes and return to the support center page.

Reset

Clicking the **Reset** button resets the page to the last saved audit trail configuration, erasing any selections that you may have recently made without saving.

Cancel

Clicking the **Cancel** button exits the audit trail configuration page and returns you to the Support Center.

Audit Trail Event Details

Your application enables you to track over one hundred and fifty events that represent actions that have accrued in your library and its associated asset source. As a Library Administrator, you can configure which events you want to be logged in your Audit Trail and designate how long these events will be kept. See Audit Trail Configuration for more information on how you can designate which events are recorded in your library's audit trail and how long they are kept.

Event Categories

Events recognized by your application are divided into the following event types. Click on each link below to display a list of events of that type and details regarding each event's properties. Event properties include the severity level associated with the event.

- Asset Acquisition Events
- Asset Maintenance Events
- Asset Usage Events
- Asset Search Events
- Asset View Events
- Classification Criteria Set Events
- Forum Events
- Library Maintenance Events
- Miscellaneous Events
- Org Group and Project Events
- Profile Events
- Report Events
- User Events
- Internal Events

Audit Trail Event Details page Content

Asset Acquisition Events

EventDefinition:
Component = LIBRARY
Event type = ASSET_ACQUISITION_REQUESTED
Severity = INFO_PRIMARY
Category = Asset Acquisition
Description = A user requested to acquire an Asset
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name

EventDefinition:
Component = LIBRARY
Event type = ASSET_ACQUISITION_APPROVED
Severity = INFO_PRIMARY
Category = Asset Acquisition
Description = An asset acquisition request was approved
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name

EventDefinition:
Component = LIBRARY
Event type = ASSET_REVOCATION_REQUESTED
Severity = INFO_PRIMARY
Category = Asset Acquisition
Description = A user requested to revoke an acquisition of an Asset
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name

EventDefinition:
Component = LIBRARY
Event type = ASSET_REVOCATION_APPROVED
Severity = INFO_PRIMARY
Category = Asset Acquisition
Description = An asset revocation request was approved
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name

EventDefinition:
Component = LIBRARY
Event type = ASSET_REGISTERED
Severity = INFO_PRIMARY
Category = Asset Acquisition
Description = An Asset was registered for use on a Project
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name

EventDefinition:
Component = LIBRARY
Event type = RELATIONSHIP_CONTEXT_UPDATED
Severity = INFO_PRIMARY
Category = Asset Acquisition
Description = A Relationship Context was updated
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name
property name = OWNING_ORGGROUP_ID
property description = Id of the owning OrgGroup
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = CONSUMING_ASSET_NAME
property description = Name of the consuming asset
property name = CONSUMING_ASSET_VERSION
property description = Version of the consuming asset
property name = CONSUMING_ASSET_ID
property description = Id of the consuming asset
property name = CONSUMING_RELATIONSHIP_NAME
property description = Name of the consuming relationship
property name = CONSUMING_PROJECT_NAME
property description = Name of the consuming project
property name = CONSUMING_PROJECT_ID
property description = Id of the consuming project
property name = CONSUMED_ASSET_ID
property description = Id of the consumed asset
property name = SOURCE_LIBRARY_ID
property description = ID of the source library triggering this event

EventDefinition:
Component = LIBRARY
Event type = RELATIONSHIP_CONTEXT_REVOKED
Severity = INFO_PRIMARY

Category = Asset Acquisition
Description = A Relationship Context was revoked
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name
property name = OWNING_ORGGROUP_ID
property description = Id of the owning OrgGroup
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = CONSUMING_ASSET_NAME
property description = Name of the consuming asset
property name = CONSUMING_ASSET_VERSION
property description = Version of the consuming asset
property name = CONSUMING_ASSET_ID
property description = Id of the consuming asset
property name = CONSUMING_RELATIONSHIP_NAME
property description = Name of the consuming relationship
property name = CONSUMING_PROJECT_NAME
property description = Name of the consuming project
property name = CONSUMING_PROJECT_ID
property description = Id of the consuming project
property name = CONSUMED_ASSET_ID
property description = Id of the consumed asset
property name = SOURCE_LIBRARY_ID
property description = ID of the source library triggering this event

EventDefinition:
Component = LIBRARY
Event type = RELATIONSHIP_CONTEXT_CREATED
Severity = INFO_PRIMARY
Category = Asset Acquisition
Description = A Relationship Context was created
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name
property name = OWNING_ORGGROUP_ID
property description = Id of the owning OrgGroup
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = CONSUMING_ASSET_NAME
property description = Name of the consuming asset
property name = CONSUMING_ASSET_VERSION
property description = Version of the consuming asset
property name = CONSUMING_ASSET_ID
property description = Id of the consuming asset
property name = CONSUMING_RELATIONSHIP_NAME
property description = Name of the consuming relationship
property name = CONSUMING_PROJECT_NAME
property description = Name of the consuming project
property name = CONSUMING_PROJECT_ID
property description = Id of the consuming project
property name = CONSUMED_ASSET_ID
property description = Id of the consumed asset
property name = SOURCE_LIBRARY_ID
property description = ID of the source library triggering this event

EventDefinition:
Component = LIBRARY
Event type = ASSET_DEREGISTERED
Severity = INFO_PRIMARY
Category = Asset Acquisition

Description = An Asset registration was removed from a Project
Properties:
property name = OWNING_ORGGROUP_NAME
property description = Owning OrgGroup name
property name = ACQUISITION_REQUEST_ID
property description = Acquisition request Id

Asset Maintenance Events

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_CREATION_REQUESTED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A user has requested that an asset be created in the assetsource (catalog)
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = LOCK_ASSET
property description = Indicates that the asset should be locked in the catalog
property name = ASSET_XML
property description = XML representation of the asset

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_CREATED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An asset was created in the assetsource (catalog)
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = PREDECESSOR_ASSET_ID
property description = Asset Id of the predecessor asset
property name = PREDECESSOR_ASSET_ID
property description = Indicates that this is the new version of an existing asset

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_DELETION_REQUESTED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A user has requested that the asset be removed from the assetsource (catalog)
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = PUBLISH_TEMPLATE
property description = Account name of submitting user
property name = ASSET_NOTE
property description = Note supplied by user

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_DELETION_APPROVED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A request for asset deletion has been approved
Properties:
property name = ASSET_NAME

property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = PUBLISH_TEMPLATE
property description = Account name of submitting user
property name = ASSET_NOTE
property description = Note supplied by user

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_DELETED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = The asset was deleted in the assetsource (catalog)
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_LOCKED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An asset was locked in the assetsource (catalog)
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_UNLOCKED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An asset was unlocked in the assetsource (catalog)
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_UPDATED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An asset was updated in the assetsource (catalog)
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_REVERTED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = The asset was reverted in the assetsource (catalog)
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION

property description = Asset version

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_SUBMISSION_REQUESTED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A user has requested that the asset be submitted for publishing
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = PUBLISH_TEMPLATE
property description = Account name of submitting user
property name = ASSET_NOTE
property description = Note supplied by user
property name = PUBLISH_TEMPLATE
property description = Publish template provided by the submitter

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_SUBMISSION_APPROVED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An Asset submission has been approved for publishing
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = PUBLISH_TEMPLATE
property description = Account name of submitting user
property name = ASSET_NOTE
property description = Note supplied by user
property name = PUBLISH_TEMPLATE
property description = Publish template provided by the submitter

EventDefinition:
Component = ASSETSOURCE
Event type = ASSET_SUBMITTED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = The asset has been submitted for publish
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = ASSETSOURCE
Event type = ARTIFACT_CREATED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A by-value artifact was added to an asset
Properties:
property name = ARTIFACT_ID
property description = Artifact ID
property name = ARTIFACT_FILE
property description = Artifact file name
property name = ARTIFACT_CONTENT_TYPE
property description = Artifact content type name

EventDefinition:
Component = ASSETSOURCE

Event type = ARTIFACT_DELETED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A by-value artifact was deleted from an asset
Properties:
property name = ARTIFACT_ID
property description = Artifact ID

EventDefinition:
Component = ASSETSOURCE
Event type = ARTIFACT_UPDATED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A by-value artifact was updated for an asset
Properties:
property name = ARTIFACT_ID
property description = Artifact ID
property name = ARTIFACT_FILE
property description = Artifact file name
property name = ARTIFACT_CONTENT_TYPE
property description = Artifact content type name

EventDefinition:
Component = LIBRARY
Event type = ASSET_AUTO_PUBLISH
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An asset was automatically published into the library
Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = ASSET_LOCATION
property description = Location of the asset
property name = REQUEST_ID
property description = Request Id

EventDefinition:
Component = LIBRARY
Event type = ASSET_AUTO_REPUBLISH
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An asset was automatically republished into the library
Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = ASSET_CHANGE
property description = XML representation of asset changes since the last publish
property name = ASSET_LOCATION
property description = Location of the asset
property name = REQUEST_ID
property description = Request Id

EventDefinition:
Component = LIBRARY
Event type = ASSET_MANUAL_PUBLISH
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An asset was manually published into the library

Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = ASSET_LOCATION
property description = Location of the asset

EventDefinition:
Component = LIBRARY
Event type = ASSET_MANUAL_REPUBLISH
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An asset was manually republished into the library
Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = ASSET_CHANGE
property description = XML representation of asset changes since the last publish
property name = ASSET_LOCATION
property description = Location of the asset

EventDefinition:
Component = LIBRARY
Event type = ASSET_AUTO_PUBLISH_FAILED
Severity = SEVERE
Category = Asset Maintenance
Description = An asset failed to either automatically publish or re-publish into the library
Properties:
property name = EXCEPTION
property description = Exception name and stack trace

EventDefinition:
Component = LIBRARY
Event type = ASSET_PUBLISH_WARNING
Severity = WARNING
Category = Asset Maintenance
Description = A warning occured during asset publishing. Current warning types:
INACCESSIBLE_QUERYABLE_ARTIFACT
Properties:
property name = WARNING_MESSAGE
property description = Warning message
property name = WARNING_TYPE
property description = Type of warning

EventDefinition:
Component = LIBRARY
Event type = ASSET_NEW_VERSION_PUBLISHED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A new version of this asset was published into the library
Properties:
property name = NEW_ASSET_VERSION_ID
property description = Asset Id of the new version of this asset
property name = NEW_ASSET_VERSION_NAME
property description = Name of the new version of this asset
property name = NEW_ASSET_VERSION_VERSION
property description = Version of the new version of this asset

EventDefinition:

Component = LIBRARY
Event type = ASSET_MANUAL_PUBLISH_REQUESTED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A request was made to manually publish an asset

EventDefinition:
Component = LIBRARY
Event type = ASSET_MANUAL_REPUBLISH_REQUESTED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A request was made to manually republish an asset

EventDefinition:
Component = LIBRARY
Event type = ASSET_MANUAL_PUBLISH_REQUEST_REDIRECTED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An Asset manual publish request was redirected to another Group
Properties:
property name = NEW_ORGGROUP_NAME
property description = New OrgGroup name

EventDefinition:
Component = LIBRARY
Event type = CHANGE_OWNING_ORGGROUP
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = The owning Group for an asset was changed
Properties:
property name = NEW_ORGGROUP_NAME
property description = New OrgGroup name

EventDefinition:
Component = LIBRARY
Event type = CONTACT_CREATED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = A Contact was created
Properties:
property name = CONTACT_NAME
property description = Contact name

EventDefinition:
Component = LIBRARY
Event type = CONTACT_UPDATED
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = An Asset Contact was updated
Properties:
property name = CONTACT_NAME
property description = Contact name

EventDefinition:
Component = LIBRARY
Event type = CONTACT_NOT_FOUND
Severity = WARNING
Category = Asset Maintenance
Description = A Contact could not be found during asset publish
Properties:
property name = CONTACT_NAME
property description = Contact name
property name = CONTACT_EMAIL
property description = Contact email

EventDefinition:

Component = LIBRARY
Event type = MULTIPLE_CONTACTS_FOUND
Severity = WARNING
Category = Asset Maintenance
Description = Multiple matching contacts were found during asset publish
Properties:
property name = CONTACT_NAME
property description = Contact name
property name = CONTACT_EMAIL
property description = Contact email

EventDefinition:
Component = LIBRARY
Event type = EDIT_PUBLISH_INFO
Severity = INFO_PRIMARY
Category = Asset Maintenance
Description = The publishing information for an asset was edited

Asset Usage Events

EventDefinition:
Component = LIBRARY
Event type = ARTIFACT_ACCESSED
Severity = INFO_SECONDARY
Category = Asset Usage
Description = An asset artifact was accessed by a user
Properties:
property name = ARTIFACT_ID
property description = Artifact ID

EventDefinition:
Component = LIBRARY
Event type = ASSET_VIEWED
Severity = INFO_SECONDARY
Category = Asset Usage
Description = The details of an Asset were viewed by a user

EventDefinition:
Component = LIBRARY
Event type = ASSET_SUBSCRIBE
Severity = INFO_PRIMARY
Category = Asset Usage
Description = A user has subscribed to an asset in the library
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = LIBRARY
Event type = ASSET_UNSUBSCRIBE
Severity = INFO_PRIMARY
Category = Asset Usage
Description = A user has unsubscribed to an asset in the library
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

Asset Search Events

EventDefinition:
Component = LIBRARY

Event type = STANDARD_ASSET_SEARCH_CREATED
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user created a persistent standard asset search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name
property name = SEARCH_CRITERIA
property description = Standard asset search criteria string

EventDefinition:
Component = LIBRARY
Event type = STANDARD_ASSET_SEARCH_DELETED
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user deleted a persistent standard asset search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name

EventDefinition:
Component = LIBRARY
Event type = STANDARD_ASSET_SEARCH_UPDATED
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user updated a persistent standard asset search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name
property name = SEARCH_CRITERIA
property description = Standard asset search criteria string

EventDefinition:
Component = LIBRARY
Event type = STANDARD_ASSET_SEARCH_RAN
Severity = INFO_SECONDARY
Category = Asset Searches
Description = A standard asset search was run
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name
property name = SEARCH_CRITERIA
property description = Standard asset search criteria string
property name = CLASSIFICATION_CRITERIA
property description = Classification Criteria for search
property name = NUMBER_OF_MATCHING_ASSETS
property description = Number of assets that matched the search
property name = MATCHING_ASSET_ID
property description = Id of an Asset that matched this search
property name = MATCHING_ASSET_NAME
property description = Name of an Asset that matched this search
property name = MATCHING_ASSET_VERSION
property description = Version of an Asset that matched this search

The following event is a "sub-event" of the STANDARD_ASSET_SEARCH_RAN. It appears in the audit-trail when the parent event is included in the audit-trail filter. Because it is a sub-event, it cannot be used in LPC filters nor can it be audited separately from its parent event.

Component = LIBRARY
Event type = ASSET_FOUND_BY_STANDARD_ASSET_SEARCH
Severity = INFO_SECONDARY
Category = Asset Searches
Description = Asset found by a standard asset search
Properties:
property name = ASSET_NAME
property description = Asset name

property name = ASSET _VERSION
property description = Asset version

EventDefinition:
Component = LIBRARY
Event type = REFERENCE_MODEL_SEARCH_CREATED
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user created a persistent reference model search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name

EventDefinition:
Component = LIBRARY
Event type = REFERENCE_MODEL_SEARCH_DELETED
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user deleted a persistent reference model search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name

EventDefinition:
Component = LIBRARY
Event type = REFERENCE_MODEL_SEARCH_UPDATED
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user updated a persistent reference model search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name

EventDefinition:
Component = LIBRARY
Event type = REFERENCE_MODEL_SEARCH_RAN
Severity = INFO_SECONDARY
Category = Asset Searches
Description = A reference model search was run
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name
property name = TARGET_FUNCTIONS
property description = Target Reference Model functions for search
property name = CLASSIFICATION_CRITERIA
property description = Classification Criteria for search
property name = NUMBER_OF_MATCHING_ASSETS
property description = Number of assets that matched the search
property name = MATCHING_ASSET_ID
property description = Id of an Asset that matched this search
property name = MATCHING_ASSET_NAME
property description = Name of an Asset that matched this search
property name = MATCHING_ASSET_VERSION
property description = Version of an Asset that matched this search

The following event is a “sub-event” of the REFERENCE_MODEL_SEARCH_RAN. It appears in the audit-trail when the parent event is included in the audit-trail filter. Because it is a sub-event, it cannot be used in LPC filters nor can it be audited separately from its parent event.

Component = LIBRARY
Event type = ASSET_FOUND_BY_REFERENCE_MODEL_SEARCH
Severity = INFO_SECONDARY
Category = Asset Searches
Description = Asset found by a reference model search
Properties:
property name = ASSET_NAME

property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = LIBRARY
Event type = ASSET_ATTACHED_TO_SEARCH
Severity = INFO_PRIMARY
Category = Asset Searches
Description = An Asset was attached to a persistent asset search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = LIBRARY
Event type = ASSET_REMOVED_FROM_SEARCH
Severity = INFO_PRIMARY
Category = Asset Searches
Description = An attached Asset was removed from a persistent asset search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = LIBRARY
Event type = SEARCH_REGISTERED_FOR_ALERTS
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user registered a persistent search for matching asset alerts
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name

EventDefinition:
Component = LIBRARY
Event type = SEARCH_DEREGISTERED_FOR_ALERTS
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user removed a registration to a persistent search for matching asset alerts
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name

EventDefinition:
Component = LIBRARY
Event type = ASSET_MATCHED_REGISTERED_SEARCH
Severity = INFO_PRIMARY
Category = Asset Searches
Description = An Asset was published that matched a search registered for alerts
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name

EventDefinition:
Component = LIBRARY
Event type = NOTE_ADDED_TO_SEARCH
Severity = INFO_PRIMARY
Category = Asset Searches
Description = A user added a note to a Search
Properties:
property name = ASSET_SEARCH_NAME
property description = Persistent Asset Search name
property name = NOTE
property description = Text of note

Asset View Events

EventDefinition:
Component = LIBRARY
Event type = ASSETVIEW_CREATED
Severity = INFO_PRIMARY
Category = Asset Views
Description = A user created an AssetView in the library
Properties:
property name = ASSETVIEW_NAME
property description = Involved AssetView name

EventDefinition:
Component = LIBRARY
Event type = ASSETVIEW_DELETED
Severity = INFO_PRIMARY
Category = Asset Views
Description = A user deleted an AssetView in the library
Properties:
property name = ASSETVIEW_NAME
property description = Involved AssetView name

EventDefinition:
Component = LIBRARY
Event type = ASSETVIEW_UPDATED
Severity = INFO_PRIMARY
Category = Asset Views
Description = A user updated an AssetView in the library
Properties:
property name = ASSETVIEW_NAME
property description = Involved AssetView name

EventDefinition:
Component = LIBRARY
Event type = ASSET_ADDED_TO_ASSETVIEW
Severity = INFO_PRIMARY
Category = Asset Views
Description = An Asset was added to an AssetView
Properties:
property name = ASSETVIEW_NAME
property description = Involved AssetView name
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

EventDefinition:
Component = LIBRARY
Event type = ASSET_REMOVED_FROM_ASSETVIEW
Severity = INFO_PRIMARY
Category = Asset Views

Description = An Asset was removed from an AssetView
Properties:
property name = ASSETVIEW_NAME
property description = Involved AssetView name
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version

Classification Criteria Set Events

EventDefinition:
Component = LIBRARY
Event type = CLASSIFICATION_CRITERIA_SET_CREATED
Severity = INFO_PRIMARY
Category = Classification Criteria Sets
Description = A Classification Criteria Set was created
Properties:
property name = CLASSIFICATION_CRITERIA_SET_NAME
property description = Name of the Classification Criteria Set

EventDefinition:
Component = LIBRARY
Event type = CLASSIFICATION_CRITERIA_SET_DELTED
Severity = INFO_PRIMARY
Category = Classification Criteria Sets
Description = A Classification Criteria Set was deleted
Properties:
property name = CLASSIFICATION_CRITERIA_SET_NAME
property description = Name of the Classification Criteria Set

EventDefinition:
Component = LIBRARY
Event type = CLASSIFICATION_CRITERIA_SET_UPDATED
Severity = INFO_PRIMARY
Category = Classification Criteria Sets
Description = A Classification Criteria Set was updated
Properties:
property name = CLASSIFICATION_CRITERIA_SET_NAME
property description = Name of the Classification Criteria Set

Forum Events

EventDefinition:
Component = LIBRARY
Event type = ASSET_FORUM_TOPIC_CREATED
Severity = INFO_PRIMARY
Category = Forums
Description = A new topic was posted to an Asset Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_TOPIC_DESCRIPTION
property description = Description of a forum topic

EventDefinition:
Component = LIBRARY
Event type = ASSET_FORUM_TOPIC_DELETED
Severity = INFO_PRIMARY
Category = Forums
Description = A topic was deleted from an Asset Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_TOPIC_DESCRIPTION

property description = Description of a forum topic

EventDefinition:
Component = LIBRARY
Event type = ASSET_FORUM_REPLY_CREATED
Severity = INFO_PRIMARY
Category = Forums
Description = A reply was posted to a topic in an Asset Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_THREAD_SUBJECT
property description = Name of a forum thread
property name = FORUM_POST_SUBJECT
property description = Subject of a forum topic or reply
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

EventDefinition:
Component = LIBRARY
Event type = ASSET_FORUM_REPLY_DELETED
Severity = INFO_PRIMARY
Category = Forums
Description = A reply was deleted from an Asset Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_THREAD_SUBJECT
property description = Name of a forum thread
property name = FORUM_POST_SUBJECT
property description = Subject of a forum topic or reply
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

EventDefinition:
Component = LIBRARY
Event type = ASSET_FORUM_THREAD_CREATED
Severity = INFO_PRIMARY
Category = Forums
Description = A thread was created in a topic for an Asset Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_THREAD_SUBJECT
property description = Name of a forum thread
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

EventDefinition:
Component = LIBRARY
Event type = ASSET_FORUM_THREAD_DELETED
Severity = INFO_PRIMARY
Category = Forums
Description = A thread was deleted from an Asset Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_THREAD_SUBJECT
property description = Name of a forum thread
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

EventDefinition:
Component = LIBRARY
Event type = LIBRARY_FORUM_TOPIC_CREATED
Severity = INFO_PRIMARY

Category = Forums
Description = A new topic was created in a Library Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_TOPIC_DESCRIPTION
property description = Description of a forum topic

EventDefinition:
Component = LIBRARY
Event type = LIBRARY_FORUM_TOPIC_DELETED
Severity = INFO_PRIMARY
Category = Forums
Description = A topic was deleted from a Library Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Subject of a forum topic or reply
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

EventDefinition:
Component = LIBRARY
Event type = LIBRARY_FORUM_REPLY_CREATED
Severity = INFO_PRIMARY
Category = Forums
Description = A reply was posted to a topic in a Library Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_THREAD_SUBJECT
property description = Name of a forum thread
property name = FORUM_POST_SUBJECT
property description = Subject of a forum topic or reply
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

EventDefinition:
Component = LIBRARY
Event type = LIBRARY_FORUM_REPLY_DELETED
Severity = INFO_PRIMARY
Category = Forums
Description = A reply was deleted from a Library Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_THREAD_SUBJECT
property description = Name of a forum thread
property name = FORUM_POST_SUBJECT
property description = Subject of a forum topic or reply
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

EventDefinition:
Component = LIBRARY
Event type = LIBRARY_FORUM_THREAD_CREATED
Severity = INFO_PRIMARY
Category = Forums
Description = A thread was created in a topic for a Library Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_THREAD_SUBJECT
property description = Name of a forum thread
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

EventDefinition:
Component = LIBRARY
Event type = LIBRARY_FORUM_THREAD_DELETED
Severity = INFO_PRIMARY
Category = Forums
Description = A thread was deleted from a Library Forum
Properties:
property name = FORUM_POST_SUBJECT
property description = Name of a forum topic
property name = FORUM_THREAD_SUBJECT
property description = Name of a forum thread
property name = FORUM_POST_BODY
property description = Body of a forum topic or reply

Library Maintenance Events

EventDefinition:
Component = ASSETSOURCE
Event type = CREATE_CONSTRAINT_TEMPLATE
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = A user created a new the Asset Constraint Template
Properties:
property name = CONSTRAINTT_EMPLATE_NAME
property description = Constraint template name

EventDefinition:
Component = ASSETSOURCE
Event type = DELETE_CONSTRAINT_TEMPLATE
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = A user deleted an existing Asset Constraint Template
Properties:
property name = CONSTRAINTT_EMPLATE_NAME
property description = Constraint template name

EventDefinition:
Component = ASSETSOURCE
Event type = UPDATE_CONSTRAINT_TEMPLATE
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = A user updated an existing Asset Constraint Template
Properties:
property name = CONSTRAINTT_EMPLATE_NAME
property description = Constraint template name

EventDefinition:
Component = ASSETSOURCE
Event type = UPDATE_DEFINITION_TEMPLATE
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = A user updated the Asset Definition Template for the library

EventDefinition:
Component = ASSETSOURCE
Event type = VISIBLE_ASSET_SOURCE_ADDED
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = A user added a visible AssetSource to an existing library's AssetSource
Properties:
property name = ASSET_SOURCE_NAME
property description = Asset source name

EventDefinition:
Component = ASSETSOURCE

Event type = VISIBLE_ASSET_SOURCE_REMOVED
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = A user remove a visible AssetSource from an existing library's AssetSource
Properties:
property name = ASSET_SOURCE_NAME
property description = Asset source name

EventDefinition:
Component = LIBRARY
Event type = PUBLISH_TEMPLATE_CREATED
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = An Asset Publishing Template was created
Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name

EventDefinition:
Component = LIBRARY
Event type = PUBLISH_TEMPLATE_DELETED
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = An Asset Publishing Template was deleted
Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name

EventDefinition:
Component = LIBRARY
Event type = PUBLISH_TEMPLATE_UPDATED
Severity = INFO_PRIMARY
Category = Library Maintenance
Description = An Asset Publishing Template was updated
Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name

Miscellaneous Events

EventDefinition:
Component = LIBRARY
Event type = PASSWORD_RESET
Severity = INFO_PRIMARY
Category = Miscellaneous
Description = A user requested a new password

EventDefinition:
Component = LIBRARY
Event type = FEEDBACK_EMAIL_SENT
Severity = INFO_PRIMARY
Category = Miscellaneous
Description = A user sent a feedback email message
Properties:
property name = EMAIL_SUBJECT
property description = Subject of the email

EventDefinition:
Component = LIBRARY
Event type = LIBRARY_CONFIGURATION_UPDATED
Severity = INFO_PRIMARY
Category = Miscellaneous
Description = A user updated the library configuration information

EventDefinition:
Component = LIBRARY

Event type = LISTENER_FAILED
Severity = WARNING
Category = Miscellaneous
Description = A Listener failed and was removed
Properties:
property name = LISTENER_ID
property description = Listener's unique ID

EventDefinition:
Component = LIBRARY
Event type = CM_APPLICATION_CREATE_FAILED
Severity = WARNING
Category = Miscellaneous
Description = Handling of a CommunityManager App create notification failed
Properties:
property name = APPLICATION_VERSION_ID
property description = Application version Id
property name = APPLICATION_NAME
property description = Application name
property name = APPLICATION_VERSION
property description = Application version
property name = WARNING_MESSAGE
property description = Warning message

EventDefinition:
Component = LIBRARY
Event type = CM_APPLICATION_UPDATE_FAILED
Severity = WARNING
Category = Miscellaneous
Description = Handling of a CommunityManager App update notification failed
Properties:
property name = APPLICATION_VERSION_ID
property description = Application version Id
property name = APPLICATION_NAME
property description = Application name
property name = APPLICATION_VERSION
property description = Application version
property name = WARNING_MESSAGE
property description = Warning message

EventDefinition:
Component = LIBRARY
Event type = CM_APPLICATION_DELETE_FAILED
Severity = WARNING
Category = Miscellaneous
Description = Handling of a CommunityManager App delete notification failed
Properties:
property name = APPLICATION_VERSION_ID
property description = Application version Id
property name = APPLICATION_NAME
property description = Application name
property name = APPLICATION_VERSION
property description = Application version
property name = WARNING_MESSAGE
property description = Warning message

EventDefinition:
Component = LIBRARY
Event type = CM_API_ACQUISITION_FAILED
Severity = WARNING
Category = Miscellaneous
Description = Handling of a CommunityManager API acquisition notification failed
Properties:
property name = APPLICATION_VERSION_ID
property description = Application version Id
property name = APPLICATION_NAME

property description = Application name
property name = APPLICATION_VERSION
property description = Application version
property name = CONTRACT_ID
property description = Contract Id
property name = WARNING_MESSAGE
property description = Warning message

EventDefinition:
Component = LIBRARY
Event type = CM_API_REVOCATION_FAILED
Severity = WARNING
Category = Miscellaneous
Description = Handling of a CommunityManager API revocation notification failed
Properties:
property name = APPLICATION_VERSION_ID
property description = Application version Id
property name = APPLICATION_NAME
property description = Application name
property name = APPLICATION_VERSION
property description = Application version
property name = CONTRACT_ID
property description = Contract Id
property name = WARNING_MESSAGE
property description = Warning message

EventDefinition:
Component = LIBRARY
Event type = MESSAGE_FAILED
Severity = WARNING
Category = Miscellaneous
Description = A message-handler failed to send a message
Properties:
property name = MESSAGE_HANDLER_NAME
property description = Message handler name

EventDefinition:
Component = LIBRARY
Event type = UDDI_WARNING
Severity = WARNING
Category = Miscellaneous
Description = A UDDI Publisher encountered an error
Properties:
property name = WARNING_MESSAGE
property description = Warning message
property name = EXCEPTION
property description = Exception name and stack trace

EventDefinition:
Component = LIBRARY
Event type = NOTE_ADDED_TO_REQUEST
Severity = INFO_PRIMARY
Category = Miscellaneous
Description = A user entered a note on an asset request
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = REQUEST_TYPE
property description = Request type
property name = REQUEST_URL
property description = Request URL
property name = REQUEST_ID
property description = Request Id
property name = USER_NAME

property description = User name
property name = NOTE
property description = Text of note

EventDefinition:
Component = LIBRARY
Event type = ASSET_REQUEST_UPDATED
Severity = INFO_PRIMARY
Category = Miscellaneous
Description = The asset request was updated by an administrator or approver
Properties:
property name = ASSET_NAME
property description = Asset name
property name = ASSET_VERSION
property description = Asset version
property name = SUBMITTING_USER
property description = Account name of submitting user
property name = PROPERTY_DIFFERENCES
property description = Property differences

Org Group and Project Events

EventDefinition:
Component = LIBRARY
Event type = ORGGROUP_CREATED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Group was created

EventDefinition:
Component = LIBRARY
Event type = ORGGROUP_DELETED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Group was deleted

EventDefinition:
Component = LIBRARY
Event type = ORGGROUP_UPDATED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Group was updated

EventDefinition:
Component = LIBRARY
Event type = PROJECT_CREATED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Project was created
Properties:
property name = PROJECT_MANAGER_ID
property description = Project manager user id

EventDefinition:
Component = LIBRARY
Event type = PROJECT_DELETED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Project was deleted

EventDefinition:
Component = LIBRARY
Event type = ORGGROUP_ACTIVATED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Group was activated

EventDefinition:
Component = LIBRARY
Event type = ORGGROUP_INACTIVATED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Group was inactivated

EventDefinition:
Component = LIBRARY
Event type = PROJECT_ACTIVATED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Project was activated

EventDefinition:
Component = LIBRARY
Event type = PROJECT_INACTIVATED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Project was inactivated

EventDefinition:
Component = LIBRARY
Event type = USER_ORGGROUP_ROLE_ADDED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A role for a User in a Group was added
Properties:
property name = ROLE_NAME
property description = Role name
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = USER_ORGGROUP_ROLE_REMOVED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A role for a User in a Group was removed
Properties:
property name = ROLE_NAME
property description = Role name
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = ASSETVIEW_ADDED_TO_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = An AssetView was added to a Group
Properties:
property name = ASSETVIEW_NAME
property description = Involved AssetView name

EventDefinition:
Component = LIBRARY
Event type = ASSETVIEW_REMOVED_FROM_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = An AssetView was removed from a Group
Properties:
property name = ASSETVIEW_NAME
property description = Involved AssetView name

EventDefinition:

Component = LIBRARY
Event type = PROFILE_ADDED_TO_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Profile was added to a Group
Properties:
property name = ASSETVIEW_NAME
property description = Involved Profile name

EventDefinition:
Component = LIBRARY
Event type = PROFILE_REMOVED_FROM_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Profile was removed from a Group
Properties:
property name = ASSETVIEW_NAME
property description = Involved Profile name

EventDefinition:
Component = LIBRARY
Event type = REFERENCE_MODEL_ADDED_TO_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Reference Model was added to a Group
Properties:
property name = REFERENCE_MODEL_NAME
property description = Involved Reference Model name

EventDefinition:
Component = LIBRARY
Event type = REFERENCE_MODEL_REMOVED_FROM_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Reference Model was removed from a Group
Properties:
property name = REFERENCE_MODEL_NAME
property description = Involved Reference Model name

EventDefinition:
Component = LIBRARY
Event type = PUBLISH_TEMPLATE_ADDED_TO_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Publish Template was added to a Group
Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name

EventDefinition:
Component = LIBRARY
Event type = PUBLISH_TEMPLATE_REMOVED_FROM_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Publish Template was removed from a Group
Properties:
property name = PUBLISH_TEMPLATE_NAME
property description = Publish template name

EventDefinition:
Component = LIBRARY
Event type = PROJECT_PARTICIPANT_ADDED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A User was added as participant of a Project
Properties:

property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = PROJECT_PARTICIPANT_REMOVED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A User's participant role in a Project was removed
Properties:
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = REPORTING_USER_ADDED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A User was added as a reporting user of a Project
Properties:
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = REPORTING_USER_REMOVED
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A User's reporting user role in a Project was removed
Properties:
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = CHANGE_PARENT_ORGGROUP
Severity = INFO_PRIMARY
Category = OrgGroups and Projects
Description = A Group's parent Group was changed
Properties:
property name = NEW_PARENT_ORGGROUP_NAME
property description = New parent Group name
property name = ORIGINAL_PARENT_ORGGROUP_NAME
property description = Original parent Group name

Profile Events

EventDefinition:
Component = LIBRARY
Event type = PROFILE_CREATED
Severity = INFO_PRIMARY
Category = Profiles
Description = A user created a Profile in the library
Properties:
property name = ASSETVIEW_NAME
property description = Involved Profile name

EventDefinition:
Component = LIBRARY
Event type = PROFILE_DELETED
Severity = INFO_PRIMARY
Category = Profiles
Description = A user deleted a Profile in the library
Properties:
property name = ASSETVIEW_NAME

property description = Involved Profile name

EventDefinition:
Component = LIBRARY
Event type = PROFILE_UPDATED
Severity = INFO_PRIMARY
Category = Profiles
Description = A user updated a Profile in the library
Properties:
property name = ASSETVIEW_NAME
property description = Involved Profile name

Report Events

EventDefinition:
Component = LIBRARY
Event type = REPORT_CREATED
Severity = INFO_PRIMARY
Category = Reports
Description = A user created a Report
Properties:
property name = REPORT_NAME
property description = Report name

EventDefinition:
Component = LIBRARY
Event type = REPORT_DELETED
Severity = INFO_PRIMARY
Category = Reports
Description = A user deleted a Report
Properties:
property name = REPORT_NAME
property description = Report name

EventDefinition:
Component = LIBRARY
Event type = REPORT_UPDATED
Severity = INFO_PRIMARY
Category = Reports
Description = A user updated a Report
Properties:
property name = REPORT_NAME
property description = Report name

User Events

EventDefinition:
Component = LIBRARY
Event type = USER_ACCOUNT_REQUESTED
Severity = INFO_PRIMARY
Category = Users
Description = A user account was requested

EventDefinition:
Component = LIBRARY
Event type = USER_CREATED
Severity = INFO_PRIMARY
Category = Users
Description = A user was created in the library
Properties:
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY

Event type = USER_UPDATED
Severity = INFO_PRIMARY
Category = Users
Description = A user was updated in the library
Properties:
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = USER_ACTIVATED
Severity = INFO_PRIMARY
Category = Users
Description = A user was activated in the library
Properties:
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = USER_INACTIVATED
Severity = INFO_PRIMARY
Category = Users
Description = A user was inactivated in the library
Properties:
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = USER_DELETED
Severity = INFO_PRIMARY
Category = Users
Description = A user was deleted from the library
Properties:
property name = USER_ID
property description = User id
property name = REPLACEMENT_USER_ID
property description = Replacement User id

EventDefinition:
Component = LIBRARY
Event type = USER_LOGGED_IN
Severity = INFO_PRIMARY
Category = Users
Description = A user logged in to the library

EventDefinition:
Component = LIBRARY
Event type = USER_LOGGED_OUT
Severity = INFO_PRIMARY
Category = Users
Description = A user logged out of the library

EventDefinition:
Component = LIBRARY
Event type = USER_ROLE_ADDED
Severity = INFO_PRIMARY
Category = Users
Description = A role for a User was added
Properties:
property name = ROLE_NAME
property description = Role name
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = USER_ROLE_REMOVED
Severity = INFO_PRIMARY
Category = Users
Description = A role for a User was removed
Properties:
property name = ROLE_NAME
property description = Role name
property name = USER_ID
property description = User id

EventDefinition:
Component = LIBRARY
Event type = USER_FAILED_LOGIN
Severity = SEVERE
Category = Users
Description = Invalid userid or password

EventDefinition:
Component = LIBRARY
Event type = USER_EXCEEDED_AUTHORITY
Severity = SEVERE
Category = Users
Description = User accessed an unauthorized page

Internal Events

EventDefinition:
Component = LIBRARY
Event type = MAX_CONCURRENT_LICENSE
Severity = SEVERE
Category = Hidden
Description = The maximum number of concurrent user licenses has been reached

EventDefinition:
Component = LIBRARY
Event type = CONCURRENT_LICENSE_COUNT
Severity = INFO_PRIMARY
Category = Hidden
Description = The number of concurrent licenses in use (this may change when a user logs in or out)

EventDefinition:
Component = LIBRARY
Event type = CONCURRENT_SESSION
Severity = INFO_PRIMARY
Category = Hidden
Description = A user is removed due to timeout, and a concurrent license is returned to the available pool

EventDefinition:
Component = LIBRARY
Event type = CONCURRENT_SESSION_STARTED
Severity = INFO_PRIMARY
Category = Hidden
Description = A user logs in but doesn't have a concurrent license

EventDefinition:
Component = LIBRARY
Event type = DUPLICATE_LOGIN
Severity = WARNING
Category = Hidden
Description = A user logs in and already has a concurrent license

EventDefinition:
Component = LIBRARY

Event type = LOGOUT_WITHOUT_LOGIN
Severity = WARNING
Category = Hidden
Description = A user logs out but doesn't have a license or was already removed

EventDefinition:
Component = LIBRARY
Event type = NAMED_LICENSE_COUNT
Severity = INFO_PRIMARY
Category = Hidden
Description = The number of named licenses in use

EventDefinition:
Component = LIBRARY
Event type = USER_SUPERUSER_NOT_ENABLED
Severity = SEVERE
Category = Hidden
Description = Superuser login attempted when that capability is disabled

EventDefinition:
Component = LIBRARY
Event type = USER_SUPERUSER_FAILED_LOGIN
Severity = SEVERE
Category = Hidden
Description = Superuser login attempt with incorrect password

Library Usage Management - Usage Controller

Managing various aspects related to the usage of your library is the responsibility of the Usage Controller.

For example, if you are a Usage Controller, you may be involved in the following tasks:

- Creating user accounts and managing their role assignments
- Creating groups and projects in order to establish a working context
- Creating profiles and asset views, and associating them with applicable groups and projects
- and more

Managing Requests

In the course of performing work in your library, work items will be triggered that require action from various users that hold roles of responsibility for each request. These requests are included in each of these users' Pending Requests list initially. When a user takes action on the request, the request moves to the user's Pending Request History page.

In addition, all requests are also included in the Managing Requests list of the library's Usage Controllers. If you are a Usage Controller, you can display the Managing Requests page by clicking on the **Asset Requests** item on your left navigation bar. This page enables you to view or manage all asset requests generated for the active administration group, regardless of which users are responsible for each request.

Specifically, this page provides:

- A displayed list of requests generated by activity in your active administration group. Note: depending on how many requests there are, this list could be truncated to display the first several, according to the sort and/or filter that is in effect on this information.
- For each request shown, the information displayed includes the type of request, its status,the user making the request, the group on whose behalf the request was made, the name and version of the asset involved, and the date and time of the request.
- The capability to apply a filter in order to limit the requests displayed.
- The capability to sort the displayed requests.
- A link to display the details of the request by clicking on **[Details]**.
- A **[Delete]** link, which enables you to delete a request that is no longer active.
- A link to display asset information pages by clicking on the asset name and version link.

Manage Requests Page Contents

This page contains the following links, information and selections.

Home

Click on this bread crumb link to display your home page.

Manage Requests Table

A table of information on the requests. See Working With Requests for information on working with this table. Also see Request Details for access to information on the different types of requests.

Asset Views

An asset view is a grouping of references to assets published in your library. If you are a Usage Controller, you can create an asset view for the purpose of establishing which assets are available for searching by the users of each project. Asset views enable you to organize asset references into useful groups. For example, you can establish asset views that group assets according to their functionality, their ownership, or some other feature they hold in common. Once an asset view is created, it can be associated with one or more projects or groups. Grouping asset references into asset views facilitates the creation of customized views of library assets for the users of each project. However, keep in mind that asset views must be updated (manually or with an automation script) each time you want to add new assets to the views.

Library assets included in an Asset User's asset tree and those available to project searches are limited to:

- Assets referenced in the asset view(s) associated with the active project (directly and through inheritance). **Note:** if no asset view is assigned to the project or any org groups above it, the assets available to project searches will not be constrained by asset views.
- Assets that meet the classification criteria values designated in the profile associated with the project, unless these are overridden by search specification classification criteria.

The remaining discussion on asset views assumes there are no classification criteria settings in the active project's profile.

Multiple Asset Views for a Project

A project may or may not be associated with one or more asset views. If the project is associated with:

- No asset views - All published assets are available to the project.
- One or more asset views, whether directly or through inheritance, the assets available to the project are those whose references are included in any of the associated asset views. Asset views are cumulative, upward, through the group hierarchy. Assets available to a project are those whose reference is contained in either an:
  - Asset view associated directly with the project, or an
  - Asset view associated with a group higher than the project in your library's group hierarchy.

Asset views are optional. When there is no need to limit which assets can be seen by a project's users, the project's org group chain need not be associated with any asset views. If neither the project nor any of its parent org groups have been assigned asset views, the project will see all library assets.

The reference to an individual asset can be contained in one or more asset views. Assets that are not referenced in at least one asset view will not be seen by any projects that have asset views assigned within their org group hierarchy.

Asset View Assignment page

This page allows you to specify the assets that are associated with an asset view. If you are a Usage Controller, you can display this page by clicking on the **[Manage]** link on the Asset View Details page. From this page you can:

- Add references to library assets.
- Remove references to library assets.

Asset View Assignment page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Asset Views

Click on this bread crumb link to display a list of the asset views available in your library.

View Details

Click on this bread crumb link to display the details of the asset view to which you are assigning assets.

This page lists the assets that can be referenced by this asset view, and allows you to add and remove assets from the view. Select the check box next to each asset you want to assign to this view, or clear the check box next to each asset you want to remove from the view.

The following information is included for each asset:

Asset Name

This is the name of the asset.

Version

This is the version of the asset. The asset name and asset version combination are unique across the library. If there are two versions of the same asset in this asset view, they will each be shown on a separate row, with their corresponding, unique version numbers.

Asset Source

This is the name of the library the asset was created in.

- Click on **Save** to save your changes and return to the Asset View Details page.
- Click on **Reset** to return the page to the most recently saved selections.

Asset Views List

This page displays a list of existing asset views. Each row contains information about an asset view.

If you are a Usage Controller, you can display this page by:

- Clicking on Asset Views in the Left Navigation Bar.
- Selecting Asset Views from the drop-down list in the Custom Search and performing a search. The asset view list resulting from a search can optionally be limited to those asset views that meet the requirements of the search string entered into the Custom Search text area.

From this page you can:

- View the list of asset view information.
- Click on an asset view name link to display its detail page.
- Click on an organizational group name link to display the group detail page
- Click on **[Create New]** to display the Asset View create page.

Asset View list page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

[Create New]

Click on this link to display the New Asset View page.

The following information is displayed for each existing asset view. This information is displayed for informational purposes and is read only.

Asset View Name

This is the name of the asset view. The asset view name is unique across the enterprise library. Click on this name link to display the Asset View detail page.

Description

This is a text description of the asset view.

Organizational Group(s)

This is the name of the organizational group(s) to which the asset view is directly associated. Click on a group's name link to display its detail page.

View/Edit Asset View Detail

This page displays the detail information of an asset view. If you are a Usage Controller, you can display this page by clicking on an asset view name link shown on various pages or your web browser application, such as the Asset View list page or a Project detail page. From this page you can:

- View and modify asset view name and description.
- Add asset references to the asset view
- Remove asset references from the asset view.
- Click on an asset name link to see the asset's information pages.
- Create or modify a note related to an asset referenced by this asset view.
- Remove the asset view from the library.

Asset View Details page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Asset Views

Click on this bread crumb link to display a list of the asset views available in your library.

[Edit]

Click on this link to display the Edit Asset View page, enabling you to modify the asset view's name or description.

[Delete]

Click on this button to remove this asset view from the library. The delete confirmation message will be shown; respond by clicking on the **OK** or **Cancel** button.

- Deleting an asset view removes the asset view, all asset references it includes and all notes associated with the asset references from the library. All groups and projects will no longer be associated with this asset view. This will result in the corresponding project users no longer having the asset view's assets available to their searches.
- Deleting an asset view has no effect on library assets.

Asset View Name

The asset view name is displayed at the top of this page following the heading **Asset View Details:**

Description

This is the text description of the asset view.

Referenced Assets

This section lists the assets referenced by this asset view. Click on the **[Manage]** link to display the Asset View Assignment page, enabling you to add or remove references to library assets.

The following information and selections are included for each asset:

Asset Name

This is the name of the asset. Clicking on the asset name link to display the asset's information pages.

Version

This is the version of the asset. The asset name and asset version combination are unique across the library. If there are two versions of the same asset in this asset view, they will each be shown on a separate row, with their corresponding, unique version numbers.

Asset Source

This is the name of the library the asset was created in.

Description

This is a text description of the asset.

Notes

You can comment on an asset reference by creating a note. A note created here corresponds to this asset in the context of this asset view. Asset reference notes are only displayed on this page. To add a note (or modify an existing note), click on the corresponding **[Edit]** link located in the **Notes** column. The Referenced Asset Note page will be displayed, enabling you to enter or modify the text of the note.

Create Asset View

This page enables the creation of a new asset view. If you are a Usage Controller, you can display this page by clicking on the **[Create New]** link on an Asset View list page. After creating the new asset view, you can add or modify its asset references by clicking on its name link in your asset view list to display the Asset Views detail page.

Asset View Create page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Asset Views

Click on this bread crumb link to display a list of the asset views available in your library.

Asset View Name

Enter a name for the asset view you are creating. The asset view name must be unique across the library. This is a required field.

Description

Enter a text description of the asset view you are creating. This is a required field.

Copy from

You can populate a new asset view with the asset references in another existing asset view. If you choose to use the asset references in an existing asset view to populate this asset view, select the name(s) of asset view(s) to copy from the selections. If you choose to create this asset view from scratch, do not choose asset view names in the Copy From selections.

Buttons

When you are finished viewing and/or modifying Asset View Create page, you can choose one of the following:

Save

Click on this button to create this asset view in the system. The new asset view is added to your asset view list. Note that the Asset View is saved without any asset references, unless you used copy from to populate this new view. Click on the asset view name link to display the Asset View detail page.

Clear

Click on this button to remove values for asset view name, description and copy from (if applicable).

Referenced Asset Note page

This page allows you to include a note with your asset view. If you are a Usage Controller, you can display this page by clicking on the **[Edit]** link in the **Notes** section of the Asset View Details page. From this page you can:

- Add or change the note associated with your asset view.

Referenced Asset Note page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Asset Views

Click on this bread crumb link to display a list of the asset views available in your library.

Asset View Details

Click on this bread crumb link to display the Asset View Details page for your asset view.

To add or change the note associated with your asset view, simply type into the **Note** field.

- Click on **Save** to save your changes and return to the Asset View Details page.
- Click on **Reset** to return the note to its most recently saved value.
- Click on **Clear** to remove the text from the **Note** field.

Edit Asset View page

This page allows you to change the name or description of an asset view. If you are a Usage Controller, you can display this page by clicking on the **[Edit]** link on the Asset View Details page. From this page you can:

- Change the asset view's name.
- Change the asset view's description.

Edit Asset View page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Asset Views

Click on this bread crumb link to display a list of the asset views available in your library.

You can change the following information for your asset view:

Asset View Name

This is the name of the asset view.

Description

This is the description of the asset view.

- Click on **Save** to save your changes and return to the Asset View Details page.
- Click on **Cancel** to discard your changes and return to the Asset View Details page.

Edit Group Asset Views page

This page enables you to add or remove the asset views directly associated with this group. To add or remove an asset view association, click on the corresponding check box. Removing all asset views directly associated with your group will cause the group to revert to its inherited asset views, until a new direct association with an alternative set of asset views is created. If no asset view is assigned to the project or any org groups above it, the assets available to project searches will not be constrained by any asset views.

For more information, see About Asset Views.

From this page you can:

- Add or remove the asset groups which are directly associated with your group.

Edit Group Asset Views page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display a list of the groups in your library.

Group Detail

Click on this bread crumb link to display the details for your group.

An asset view is a grouping of references to assets published in your library. It enables a Usage Controller to establish which assets are available for searching by the users of each project. Each group is inherently associated with one or more asset views. Asset views can either be associated with a group directly, or they can be inherited from the next org group in your group's inheritance chain. Removing all asset views directly associated with your group will cause the group to revert to its inherited asset views, until a new direct association with an alternative set of asset views is created. If no asset view is assigned to the project or any org groups above it, the assets available to project searches will not be constrained by any asset views.

Select one or more asset views you wish to associate directly with your group, or remove the direct association by deselecting all of the asset views.

- Click on the **Save** button to record your changes and return to the Detail page.
- Click on the **Cancel** button to return to the Detail page without recording any changes.

Asset Management

This page provides a filter you can use to display a list of the assets in progress from your library's asset source. If you are assigned the role of Usage Controller, you can display this page by clicking on the **Asset Management** item in your left navigational bar.

The Asset Management page is initially displayed with the default filter and results. If you click **Apply Filter** button without modifying the filter, the default filter settings will result in a list of assets from your library's asset source which are located within the active administration group. To control which assets are displayed, you can use the filter to identify a subset of assets. You may also use the sorting of the asset result list to affect the order of their display, and thereby also which assets are displayed in the truncated list. The default sorting used is descending order by Last Edit date.

Each row in the result table contains the following for each asset: asset name and version, owning group, edit availability, information about active changes and last edit date. An **[Unlock]** action is available for each asset that has an Edit Availability status of *Locked*, and a **[Delete]** action is available for each asset in the list.

From this page you can:

- Choose to display a list of assets from the library's asset source.
- View the information of an asset in progress.
- Unlock an asset if it is currently locked by an Asset Capture Engineer.
- Delete an asset.
- Send an email to a user who currently has locked an asset.

Asset Management Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Available Assets Filter

All assets which are located within the active administration group of your library's asset source are available to be listed through use of the Assets in Progress filter. Any assets that are locked by Asset Capture Engineers are listed and shown as locked in the Edit Availability column of the available assets results table.

The following are available in the available assets filter:

Asset Name

The Asset Name selection field enables you to enter the name of an asset you wish to list. Alternatively, you can enter a character string with wildcards in order to list multiple assets. You can switch the sort order by clicking on the Asset Name(version) column heading. Result assets immediately reflect the new sort order; the filter need not be run to trigger this action. See Filtering and Sorting for more information.

Owning Group

The value selected in the group drop down refers to the group owning the asset. You can choose to display assets for a single group by selecting the group name from the drop down list. In this case, only assets owned directly by the group selected will be included in the result. Assets that are owned by groups subordinate to the group selected (in your library's group hierarchy) will not be included in the result. The Group column can also be used to sort result assets. Result assets immediately reflect the new sort order; the filter need not be run to trigger this action. See Filtering and Sorting for more information.

Edit Availability

This section indicates the current status of an asset in progress related to whether or not the asset is available for you to open for edit. The three Edit Availability status values are *All*, *Locked by*, or *Available*. In addition, you can add a search string in the text box provided to find assets by User ID. The default filter will display all assets in the active administration group, regardless of Edit Availability status. You can choose to display assets for one status or the other by selecting the corresponding radio selection. The Edit Availability column can also be used to sort result assets. Result assets immediately reflect the new sort order; the filter need not be run to trigger this action. See Filtering and Sorting for more information.

Active Changes

This section indicates the current status of an asset in progress related to whether or not the asset has been modified since its last publish. There are four possible status values:

- **Unsubmitted changes** - Changes have been made to the asset in progress since the last publish; the asset has not yet been submitted for publish since these changes were made.
- **None** - No changes have been made to the asset in progress since the asset was last published. This status is also used for an asset that has been created, but not yet submitted for publish.
- **Changes submitted for approval** - Changes have been made to the asset in progress since the last publish; the asset has been submitted for publish since these changes were made. The submission for publish request is pending approval.
- **Deletion requested** - An Asset Capture Engineer has requested that this asset be deleted from the asset source and your library. The deletion request is pending approval.

The default filter will display all assets in the active administration group, regardless of Active Changes status. You can choose to display assets for one or more status values of your choice by checking the corresponding check boxes. The Active Changes column can also be used to sort result assets. Result assets immediately reflect the new sort order; the filter need not be run to trigger this action. See Filtering and Sorting for more information.

Apply Filter

Click this button to apply the filter selections.

Available Assets

The list of available assets resulting from running the Available Assets filter are displayed as rows in the Available Assets table. If an asset you are looking for is not currently displayed, you can change the filter and sort of the display in order to show the asset you are interested in. See Filtering and Sorting for more information.

The Available Assets table contains the following information and functionality:

Actions

This column offers the filter **Unlock** link for those assets that have an Edit Availability status of *Locked*. Use the **Unlock** link to unlock the corresponding asset, which makes the asset available to other Asset Capture Engineers.

Asset Name(version)

The Asset Name(version) is displayed and provides a link to view the asset in progress information of the asset. This link is useful for viewing asset source information for an asset that is locked by another Asset Capture Engineer.

Owning Group

The group name provided in this column is the owning group of this asset.

Edit Availability

This column indicates the current status of an asset in progress related to whether or not the asset is available for an Asset Capture Engineer to open for edit. If an asset has the status of *Locked*, you are provided an **Unlock** link in the Actions column. If the asset is locked by another user, the user name is provided as a link to send an email to that user. An exception applies if the asset is locked as part of a governance process established your library. In this case, the locking user will show as "Repository Manager," which represents a user account associated with the Application instead of a standard user account. It is not possible to email the Repository Manager user.

Active Changes

This column indicates the current status of the asset in progress related to whether or not the asset has been modified since its last publish. If the status indicates a request has been submitted for the asset (for example to publish the asset or to delete the asset) and you are the one who submitted the request, this column provides a link to the request detail page.

Last Edit

This column indicates the last edit date of the asset in progress.

Working with the Available Assets Table

The following capabilities are available for working with the assets in progress table and the available assets filter.

Search Results Paginate Controls

In addition to providing the asset information, there are additional pagination controls at the bottom of the search result page:

- To move through the result pages, click on the **<** or **>** icons or enter the page number.
- To update your search results, click the **Refresh** icon.
- To override the default designation with a selection of your own classifiers, click the **Change Classifier Columns** button.
- To change the number of assets viewed per page, click on the **Asset per Page:** button.
- You may see a total count of assets included in the result set. Note: see Manage My Account for more information about turning this option on or off.

Sorting

Primary Sort, ascending or descending

If you wish to sort the asset rows by a column value, simply click on the column name of any column that shows the column name. An ascending sort is applied by default. You can switch the sort order to descending by clicking on the column name again. The triangle icon depicts whether the sort order is ascending or descending. Note: only the primary sort key is noted as ascending or descending.

Sorting and column selection can also be completed by mousing over the column name and a drop down triangle icon is displayed at the end of the name column. Click the drop down arrow to display additional sort and column selections.

Change Column Order

Columns can be rearranged by dragging and dropping the column name to a new location. Click and drag the column name along the name row unit you see two arrows between name columns. With the arrows displayed you can drop the name column in this new location.

Contacts

Your application enables you to create a set of information for multiple instances of an entity called a "Contact." Each contact can be used to create a new user account and/or to provide a contact to support an asset. For example, a contact assigned to an asset by an Asset Publisher enables a user to access the name and email address of a person that can provide usage assistance for the asset.

Each user account you create in a library must be based on an existing contact. However, you can create a contact for your installation that does not have a user account for your library. The information stored for each contact includes:

- name (a full name, first name and last name)
- email address
- phone information (land line,cell and fax)

Working with Contacts

Creating and Managing Contact Information - If you are a Usage Controller, you can create a contact for your installation and edit the information stored for an existing contact. Note: there is one set of contacts that is shared by all libraries in your installation. Any user that is a Usage Controller on any of the libraries in your installation has the ability to create and maintain installation contact information.

Creating a new Project User **-** If you are a Project Manager, you can select a contact from the contact list in order to create a new user account in order to add a new user to your project.

Assigning Contacts to Assets **-** If you are a Publisher, you can assign a contact from the list of Contacts available to your library to an asset in the asset's publish information.

Contacts List

Contact management for your installation is available to each of the Usage Controllers for the library(ies) included in your installation. If you are a Usage Controller, you have a **Contacts** item available to you on your left navigation bar. Click on this item to display the Contact List page which enables you to add new contacts to your installation and to edit the information on existing contacts.

Specifically, the Contact list page provides:

- A list of contacts that currently exist for your installation.
- A means of filtering this list by email address and/or by contact full name.
- A link to add a new contact to your installation.
- A link corresponding to each existing contact to edit its information.

Contact List Content

The Contact List page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

[Create New]

Click on this link to display the Create Contact page, enabling you to add a new contact to your installation.

Filter

There is a row beneath the contact column headings that offers filter widgets in the first column and a text box for the Email and Full Name columns for entering full or partial character strings to be used in filtering.

A filter is used to limit or modify which contacts are displayed on this page. For example, you can enter *Bruce Johnson* in the Full Name column in order to filter out all other contacts and display only Bruce Johnson. Alternatively, you can wild card your character string. An entry of *Johnson* would return all participants whose Full Name includes Johnson. An entry of Bru* would return all participants whose first name begins with Bru.

Run

Click on this button to apply the filter you have designated in the text boxes of each column.

Clear

Click on this button to clear the text boxes. Note: to clear an applied filter, you can choose **Clear**, then **Run**.

The following information or selections are available for the contacts shown.

[Select]

Click on this link to display the Edit Contact page, enabling you to edit the information for the corresponding contact.

Full Name

This is the full name currently recorded for this contact.

Email

This is the email address associated with the contact.

Note: If a contact you are looking for is not currently displayed, you can change the filter and sort of the display in order to show the participant you are interested in. See the **Filter** and **Sort** sections in this document for more information.

Custom User Attributes

Your contact list may display additional columns of information, depending the configuration of your installation.

Sort

Primary Sort, ascending or descending

If you wish to sort the contact rows by a column value, simple click on the column name. An ascending sort is applied (by default). You can switch the sort order to descending by clicking on the column name again. The triangle icon depicts whether the sort order is ascending or descending. Note: only the primary sort key is noted as ascending or descending.

Additional levels of sorting

If you click on one column name only, the result is a primary sort. If you wish to add a secondary sort, click on the secondary column name first, then click on the primary sort column name. Only the primary sort column has the choice of ascending or descending sort order.

Edit Contact Information

If you are a Usage Controller, you can edit the information for a contact in your installation by clicking on the **[Select]** link corresponding to the contact on your Contact List page. In addition, individual users can edit their own user information by clicking on the **[Manage my Account]** link at the top of their home page, then clicking on the **[Edit]** link next to **Contact Information**.

Contacts can be added automatically as part of your external user authentication system (such as LDAP), or they can be added manually by using the **[Create New]** link on the Contact List page. The Full Name and Email fields are required. Other fields may be included as well, such as First Name, Last Name, Department, etc. In addition, library-managed fields can also be included and are configured by your System Administrator. These fields could include any fields not provided by your authentication system, such as Cell Phone Number, Serial Number, etc.

When editing contacts that are associated with your external user authentication system (such as LDAP), you will not be able to edit the information managed by that external system; the information is displayed as read-only. When editing contacts that were added manually, all of the contact information is editable.

Edit Contact Information

The Edit Contact Information page contains the following selections and information:

Home

Click on this bread crumb link to display your Home page.

Contact List

Click on this bread crumb link to display your Contact List page.

Edit any of the following information for the contact.

Full Name

The full name of the contact. This field will be displayed on the Contact List page and can be used for filtering and sorting the contact list.

Email

The email address of the contact. This field will be displayed on the Contact List page and can be used for filtering and sorting the contact list.

First Name

The first name of the contact.

Last Name

The last name of the contact.

Phone

The contact phone number.

Fax

The contact fax number.

Cell

The contact Cell phone number.

Custom User Attributes

Your page may include additional contact information, depending the configuration of your installation.

Buttons

When you are finished editing contact information, click on the following button of your choice.

Save

Click on this button to revise the contact information with the changes you have edited and return to the previous page.

Cancel

Click on this button return to your previous page without affecting the contact information.

Create New Contact

If you are a Usage Controller, you can add a contact to your installation by clicking on the **[Create New]** link available at the top of your Contact List page.

Add a Contact to your Installation Content

The Create a Contact page contains the following selections and information:

Home

Click on this bread crumb link to display your Home page.

Contact List

Click on this bread crumb link to display your Contact List page.

Enter the following information for the contact you are creating. When you manually add a new contact using [Create New], the information is not associated with your external user authentication system (such as LDAP).

Full Name

Enter the full name of the contact. This field will be displayed on the Contact List page and can be used for filtering and sorting the contact list.

Email

Enter the email address of the contact. This field will be displayed on the Contact List page and can be used for filtering and sorting the contact list.

First Name

Enter the first name of the contact.

Last Name

Enter the last name of the contact.

Phone

Enter the contact phone number.

Fax

Enter the contact fax number.

Cell

Enter the contact Cell phone number.

Custom User Attributes

Your page may include additional contact information, depending the configuration of your installation.

Buttons

When you are finished entering contact information, click on the following button of your choice.

Create

Click on this button to create a contact with the information you have entered and return to the Contact List page.

Cancel

Click on this button return to your Contact List page without creating a contact.

Classification Criteria Sets

Classification Criteria

Your library has an established Global Asset Definition that defines the full set of classifiers available for inclusion with library assets. Asset classifiers consist of both technical and business-oriented characteristics of the asset and are customized to your library. Examples of classifier values may include things like type of operating system, database vendor, and preferred asset supplier. Each asset in the library contains values for one or more classifier elements. You can perform searches for assets based on the values they have for their various classifiers.

Classification criteria are values that are established for the purpose of conducting an asset search or providing an asset filter to include assets that have classifiers containing these values. Assets that have classifier values matching the classification criteria values are included in the result list when a search is run, or are included in an action applied to assets meeting the qualifications of the asset filter.

Classification Criteria Set

A classification criteria set is a predefined group of classifiers and their values. Classification criteria sets are created and named by a Usage Controller. If you are a Usage Controller, you can create classification criteria sets and make them available to users in your library.

Using Classification Criteria Sets

When searching for assets, you can include classification criteria for use in asset queries and model based searches by identifying a classification criteria set, instead of designating each classification criteria individually. In addition, you may also designate a classification criteria set as a means of filtering assets to be included in:

- a project's asset tree and search box searches (Usage Controller)
- a project's asset queries and model based searches as default classification criteria values (Usage Controller)
- the displayed list of assets available when designating an asset related to the asset you are editing. See Global Definition Template for information on specifying the use of a classification criteria set for this type of filter for an asset relationship. (Library Administrator)
- the use of the feature for "federated" libraries, where an asset owned and produced in one library's asset source can be set up for publish to another library(ies). See Assets from other Asset Sources and/or your System Administrator for more information on library federation. (System Administrator)
- automatic publish to a UDDI repository. For more information on publishing to a UDDI registry, please see About Publishing to a UDDI Registry.

Classification Criteria Set List

This page displays a list of classification criteria sets. Each row contains information about a classification criteria set.

If you are a Usage Controller, you have access to Classification Criteria Sets. Display this page by clicking on Classification Criteria Sets in the Left Navigation Bar.

From this page you can:

- View the list of classification criteria sets and their descriptions.
- Click on a classification criteria set name link to display its detail page.
- Click on **[Create New]** to display the Classification Criteria Set create page.

Classification Criteria Set list page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

[Create New]

Click on this link to display the Classification Criteria Set create page, enabling the creation of a new classification criteria set.

The following information is displayed for each existing classification criteria set. All of this information is for display purposes and is read-only.

Classification Criteria Set

This is the name of the classification criteria set. Each set name is unique across the library. Click on the classification criteria set name link to display the Classification Criteria Set detail page.

Description

This is a text description of the classification criteria set.

View/Edit Classification Criteria Set Detail

This page displays the detail information of a classification criteria set. If you are a Usage Controller, you have access to Classification Criteria Sets. Display this page by clicking on a classification criteria set name link on a Classification Criteria Set list page. This page is also displayed when you create and save a new classification criteria set. From this page you can view and edit classification criteria set information and delete a classification criteria set.

Classification Criteria Set detail page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Classification Criteria Sets

Click on this bread crumb link to display a list of the classification criteria sets in your library.

[Edit]

Click on this link to display the Edit Classification Criteria Set Details page, enabling you to modify the set's name and/or description.

[Delete]

Click on this link to remove this classification criteria set from your library. The delete confirmation message will be shown; respond by clicking on the **OK** or **Cancel** button.

- Deleting a classification criteria set removes the set from the list of available classification criteria sets for profile and search specification use. In addition, it will not be available to copy from when creating a new classification criteria set. However, deleting a classification criteria set has no effect on the classifiers and values established in existing profiles and search specifications.
- Classification criteria sets are optional. Your library is not required to have a classification criteria set.

Description

This is the text description for the classification criteria set.

Classification Criteria

This shows the current list of classifiers and their values as designated in this classification criteria set.

Classification Criteria [Edit]

You can click on this **[Edit]** link to display the Edit Classification Criteria page. This enables you to add, remove or update the classification criteria for this set. Note: any changes you make can only be saved to your set from this edit page. See the Edit Classification Criteria page for more infomation about adding classification critieria to your Classification Criteria Set.

Name

This column shows the current list of classifier names as designated in this classification criteria set.

Value(s)

This column shows the current list of classifiers values selected for the classifier name as designated in this classification criteria set.

Create New Classification Criteria Set

This page enables the creation of a classification criteria set. If you are a Usage Controller, you can create a Classification Criteria Set. Display this page by clicking on the **[Create New]** link at the top of your Classification Criteria list page.

Classification Criteria Set Create page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Classification Criteria Sets

Click on this bread crumb link to display a list of the classification criteria sets in your library.

Name

Specify a unique name for this set of classification criteria. The classification criteria set name must be unique across your library.

Description

This is a text description of the classification criteria set.

Copy From

If your library already has at least one classification criteria set, you can populate a new classification criteria set with the criteria and values of an existing classification criteria set. If you choose to use the settings in an existing classification criteria set to populate this classification criteria set, select the name of the set to copy from in the drop-down list. You can choose only one classification criteria set for this purpose. If you choose to create this classification criteria set from scratch, do not choose a set name in the Copy From drop-down list.

Buttons

When you are finished creating a new classification criteria set, click on the following button of your choice.

Save

Click on this button after you have entered information on classification criteria set name and description to create this classification criteria set in the system. The Classification Criteria Set detail page will be displayed as a result, which enables you to add, modify or remove classification criteria.

Clear

Click on this button to remove any values you have entered for set Name, Description and Copy from.

Edit Classification Criteria Set Details page

This page enables you to change the name and description of your classification criteria set. If you are a Usage Controller, you have authority to edit a Classification Criteria Set. Display this page by clicking on the **[Edit]** link at the top of your Classification Criteria Set Detail page.

Edit Classification Criteria Set Details page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Classification Criteria Sets

Click on this bread crumb link to display a list of the classification criteria sets in your library.

Classification Criteria Set Details

Click on this bread crumb link to display the details of the classification criteria set you are currently editing.

Name

Specify a unique name for this set of classification criteria. The classification criteria set name must be unique across your library.

Description

This is a text description of the classification criteria set.

Buttons

When you are finished creating a new classification criteria set, click on the following button of your choice.

Save

Click on this button after you have entered information on classification criteria set name and description to change this classification criteria set in the system. The Classification Criteria Set Detail page will be displayed as a result, which enables you to add, modify or remove classification criteria.

Cancel

Click on this button to remove any changes you have made, and return to the Classification Criteria Set Detail page.

Groups

Groups in your library are created by a Usage Controller in order to organize work to be done, provide context for role assignment and asset ownership and to enable the reporting required. When your library is initially created, it is created with the enterprise group as the highest level or root group. All other groups are established as subordinate to the enterprise group. There can be multiple group levels, depending on the needs of your organization.

If you are a Usage Controller, you will create a group and designate its placement in the library's group hierarchy by naming its parent group.

Each of the following are items that can be associated with a group. These items can be associated directly with a group or, alternatively, groups can inherit items associated with groups above them in the library's group hierarchy.

- Group users -- available only for project groups (see group types below)
- Group role assignments
    - Asset Capture Engineers
    - Publishers
    - Usage Controllers
    - Asset Owners
    - Custom Roles associated with your library's process governance configuration.
- Profiles
- Reference Models
- Asset Views

Due to the hierarchical manner in which these items are associated with each group, you have an effective and flexible way to establish work environments for library tasks related to the production or usage of assets. By the associations you design for the groups in your hierarchy, you are determining such things as:

- which users will have authority to work within a project for the purpose of finding, using and collaborating with published assets (project groups only)
- which classification criteria, and asset tree sort criteria will be used as defaults for project participants conducting asset searches
- which reference models and assets will be available to project participants
- which users will have authority to create and update assets
- which users will have authority to work with assets submitted for publish

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Group Types

A group can be one of two types:

Project

A project is created to provide context for the asset search, asset research and asset registration work that is performed by project participants. Projects cannot have any subordinate organizational groups beneath them, and are therefore at the bottom of each group inheritance chain. Please see [About Projects] for more information on this type of group.

Group (or non-project group)

A non-project group is created to provide a work context available to project users through inheritance and/or to provide context for the asset ownership responsibilities of asset creation, update, publish approvals, acquisition approvals, etc. without the aspects of project participation for asset searching and usage activities. Non-project groups, in conjunction with projects, enable a hierarchical assignment of Asset Capture Engineer, Asset Owner, Publisher, Usage Controller, and custom governance roles, asset views, profiles and reference models. Non-project groups are super-ordinate to projects in the group hierarchy. Each project inherits information from the non-project group(s) above it in the hierarchy. Please see About non-project Groups for more information on this type of group.

Reporting Group Designation

Users are required to have a reporting group assignment. The reporting group may be used to enable you to see reports assigned to this group. It may also be used for some users whose accounts are used for asset production automation and library federation. See the System Administration Guide for more information.

In addition, if you are a Usage Controller, you can create report entries for users assigned to a particular reporting group.

To change a user account's reporting group to the group shown on the Group Detail page, click the Reporting User checkbox "on." To change a user account to use a different group than the one currently shown, navigate to the User Details page for the user and click on **Reporting Group [Edit]**.

Groups List

This page displays a list of existing organizational groups in your library. This list includes sections for Groups (non-project groups) and Projects. Each row contains information about a group.

If you are a Usage Controller, you can display this page by:

- Clicking on Groups in the Left Navigation Bar.
- Selecting Groups from the drop-down list in the Custom *Search* and performing a search. The Organizational Group list resulting from a search can optionally be limited to those organizational groups that meet the requirements of the search string entered into the *Custom Search* text area.

From this page you can:

- View the list of group information.
- View the list of project information.
- Click on a group name link to display its Detail page.
- Click on a project name link to display its Detail page.
- Click on a profile name link to display its Detail page.
- Click on the **[Create New Group]** link to display the Create a Group page.
- Click on the **[Create New Project]** link to display the Create a Project page.

List Organizational Groups page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

The following information is displayed for each existing group. This information is displayed for informational purposes and is read only.

Groups [Create New Group]

Click on this link to display the create New Group page.

Name

This is the name of the group. The group name is unique within your library. Click on this name link to display the Group Detail page.

Description

This is a text description of the group.

Profile

This is the name of the profile directly associated with the group, if any. Each group may or may not have a profile directly associated with it. You can click on the profile name link to display its Profile Details page.

The following information is displayed for each existing project. This information is displayed for informational purposes and is read only.

Projects [Create New Project]

Click on this link to display the create New Project page.

Name

This is the name of the project. The project name is unique within your library. Click on this name link to display the Project Detail page.

Description

This is a text description of the project.

Profile

This is the name of the profile directly associated with the project, if any. Each project may or may not have a profile directly associated with it. You can click on the Profile name link to display its Profile Details page.

Status

This is the project's status. Project status may be either *Active* or *Inactive*.

Edit Group page

This page enables you to change attributes of a group. For more information about groups, see About Groups. For more information about projects, see About Projects. From this page you can:

- View and edit the group's name, description, and parent group.
- Specify whether the group is allowed to own assets.
- For non-project groups, specify the manager, or make the group a project.
- For project groups, change the status to active or inactive.

Edit Group page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display a list of the groups within the scope of the active administration group.

Group Detail

Click on this bread crumb link to display the details for your group.

The page shows the following information about the group:

Name

This is the name of the group. If you change the group name, you must enter a new name that is unique within your library.

Description

This is a description of the group.

Parent Group

This is the name of the group that this group is a child of (subordinate to) in the library's group hierarchy. Selection of the parent group designates the placement of this group within your library's group hierarchy. If you click on this link, the parent group's detail page will be displayed. The Enterprise Group is the only group that does **not** have a parent, so if you are editing the Enterprise Group, you do not have the option of assigning a parent.

Manager (optional)

This is the name of the manager of this group. Unlike a project manager, a name given here does not have to be a user of the library. This name is used for informational purposes only, and is not used by your library in any other way. This field only applies to non-project groups.

Make this a Project

A project is a specialized type of group. Projects are always end-node groups. For more information, see About Projects. Click this checkbox to designate the group as a project. A group can only be changed to a project if it is not a parent to another group or project. Projects must have an assigned Project Manager. Once a group is made into a project, it cannot be changed back into a non-project group.

Project Manager

Select the project manager assigned to this project.

Status

Projects can be marked as active or inactive. An inactive project is not allowed to acquire assets, and cannot be selected as your active project.

Allowed to Own Assets

This indicates whether or not the group is allowed to own assets.

- Click on the **Save** button to record your changes and return to the Details page.
- Click on the **Cancel** button to return to the Details page without recording any changes.

Edit Group Properties Popup

The edit group properties popup is displayed when a Usage Controller clicks on the **[Edit]** link in the Properties section of the Group Details page.

The properties you see depends on what has been configured in your library for groups. See your Library Administrator for more information about the configuration aspects of your library.

Some properties will accept a text, numeric, date or boolean value, for example. Other properties may indicate the need for you to name (or browse to) a file. Still others require a reference to a file stored outside of the application. Depending on the type of property, input is supported by an appropriate widget. In some cases, a default value is provided, and a value list may be available to choose from.

Properties

This section lists the various properties associated with the group.

Buttons

Save

Click on the **Save** button to save your changes and return to the Group Detail page.

Cancel

Click on the **Cancel** button to return to the Group Detail page without saving any changes.

Edit Group Reference Models page

This page enables you to add or remove the reference models directly associated with this group. Reference models that are indirectly associated with this group are displayed with a grayed-out check mark and cannot be removed here. To add or remove a reference model association, click on the corresponding check box.

For more information, see About Reference Models.

From this page you can:

- Add or remove the reference models which are directly associated with your group.

Edit Group Reference Models page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display a list of the groups in your library.

Group Detail

Click on this bread crumb link to display the details for your group.

A reference model provides a visual representation of functionality for a particular domain of interest to library users. A reference model can provide an easy way to search for assets, through use of a model based search.

Select one or more reference models you wish to associate directly with your group, or remove the direct association by deselecting all of the reference models.

- Click on the **Save** button to record your changes and return to the Detail page.
- Click on the **Cancel** button to return to the Detail page without recording any changes.

Change Active Administration Group

If you are a Usage Controller, the name of your active administration group is listed in the Administration section of the left navigation bar. You can change the active administration group by clicking on the **[Change]** link next to the group name, which displays this dialog. The active administration group is used to provide context for administration tasks. For more information about groups, see About Groups. For more information about projects, see About Projects. From this dialog you can:

- Choose a group to become your active administration group.
- Filter the groups shown in the list.

Change Active Administration Group dialog contents

This dialog contains the following selections and information:

Filter by name

If you have a large number of groups to administer, you can make it easier to find the group you want to work with by typing in part of the name and clicking on the **Apply Filter** button. The list of groups is refreshed to reflect only the groups whose name contains your filter.

Group List

The groups for which you have Usage Controller authority are listed, optionally filtered by name. Information shown for each group includes the Name and Description. The current active administration group is selected by default.

Updating your active administration group selection

To select a different active administration group, select the radio button next to the group you wish to use.

Save

Click on the **Save** button to set the active administration group to the group you selected.

Cancel

Click on the **Cancel** button to exit the dialog without changing the active group.

Add Users to Group page

The Add Users to Group page enables you to add a new user for the purpose of role assignment or reporting designation.

From this page you can:

- Assign a user the role of Asset Capture Engineer (ACE), Asset Owner, Publisher, Usage Controller, or a custom role.
- Create new library users for the purpose of granting them roles in your group, or assigning them as reporting users.

Add Users to Group Page Contents

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group Detail

Click on this bread crumb link to display the Group Detail page.

[Save User Changes]

Click on this link to save any changes you have made to add users to the group and then return to the Group details page.

[Create Users]

Click on this link to display the Create Users page, enabling you to add new library users as needed to give them a role in your group. Simply type in a full or partial (wild carded) search string, and click on Run in order to display authenticated users available to add to your library. Note: you can add any new user that has authentic credentials as determined by your user authentication configuration.

Click on [Create Selected Users] after you have checked the User box corresponding to any new user you wish to add. Note that this creates a library user account for the users you've designated. They are not yet assigned to roles in your group until you do so on the Add Users to Group page.

When you return to the Add Users to Group page after creating a new user, the list of users is filtered to the user(s) you just added to your Library. You can now click on the check box associated with each user you'd like to add to your group, along with the roles you've designated for each user.

To show all library users again, you can click on the **Run** Filter button to clear the filter that is limiting the user list to newly-created library users only.

[Cancel]

Click on this link to return to the Group Detail page without saving changes made to the Add Users to Group page.

Finding and Adding New Group Users

Clicking the **Run** button, without specifying any filter criteria, can be used to display a list of all the active users in the library.

If a user account you are looking for is not currently displayed, you can change the filter and sort of the display in order to show the user you are interested in. See **[Create Users]** above for information on how to add a user that is not currently a library user.

To assign a role to a user, select the appropriate check box(es) in the *Roles* column. You can assign a user the role of Asset Capture Engineer (ACE), Asset Owner, Publisher, Usage Controller, or a custom role, as described below:

- If a user is assigned the role of Asset Capture Engineer (ACE), they are responsible for maintaining asset content for the group. They will have access to assets owned by this group and all groups subordinate to it in the group hierarchy of your library.
- If a user is assigned the role of Asset Owner, they have the ability to approve project users' asset requests for a group. They will have this responsibility for assets owned by this group and all groups subordinate to it in the group hierarchy of your library.
- If a user is assigned the role of Publisher, they may be responsible for managing publication requests for assets owned by the group, depending on the group's publish configuration. They will also have the responsibility for maintaining asset publish information for assets owned by the group.
- If a user is assigned the role of Usage Controller, they may be responsible for many aspects of your library, depending on your library configuration. Some of these responsibilities may include creating and maintaining user accounts and roles, groups and group assignments, contacts, profiles, asset views, and more. For more information about the Usage Controller role, see Usage Controller Role.

You cannot remove the designation for a reporting user. Rather, you must assign the user as a reporting user to another group by using the user detail page or the group detail page for the new reporting group.

When you are finished updating the Users table, click on **[Save User Changes]** link or use the **Save** button at the bottom of the page to save your changes.

Projects

Projects are created to provide the context within which asset searches, asset research and asset registration are performed. A project is placed into the organizational group hierarchy upon creation, and represents the termination point of a group hierarchical path.

When an Asset User searches for assets or researches found assets, they are performing this work within the context of their active project. The choice of active project determines which assets are available to project searches, which classification criteria values are set by default for use during asset searches, and which reference models can be used. Project participants can acquire assets for reuse on behalf of the project. Projects can also own assets. Project Metrics are available from a link on the Project Detail page.

A Usage Controller establishes projects and designates the following for each:

- One or more users, each of which can perform work for a project. One or more of the projects users is assigned as the Project Manager. Once the project is created, a project manager can also add new participants to the project in addition to the Usage Controller performing this action.
- A profile (optional), which associates information used as default settings for asset search work. If a project is not assigned a profile, it uses the profile from the next organizational group above it in the organizational group hierarchy which has an assigned profile.
- One or more asset views (optional), which define the assets viewable by the project's Asset Users. Project users can view assets whose references are included in the asset views assigned to the project directly. In addition, they can view assets whose references are included in the asset views assigned to groups super-ordinate to the project in the group hierarchy. If an asset view(s) is not associated with a project and there are no asset views inherited from super-ordinate groups, all assets that meet the criteria (if any) designated in the profile applicable to the project are available to the project participant's searches.
- One or more reference models (optional), which can be used as reference models for model based searches performed for a project.
- Project role assignments (optional). Like their counterpart non-project groups, projects can assign asset ownership roles to users. See About Groups for more information. A Project Manager can also perform this task.

View/Edit Project Detail

This page displays detailed information for a project and includes the information and links corresponding to the Usage Controller tasks. If you are a Usage Controller for a project, you can display this page by clicking on the project name link from various pages, such as the Group List page or the Profile detail page.

This page displays detailed information for a group designated as a project. From this page you can:

- View and edit information about this project, including its name, description, type, status, and whether or not the project is allowed to own assets.
- Access a link to View information on Project Metrics, related to assets owned by this project and assets acquired by this project (if supported by the configuration of your installation).
- View and edit existing associations in place for the project, such as Reference Models, Profile, Asset Views, Reporting Users, Publish Templates and project Participants.
- View and assign users to group roles for this project.

Note: there is a Project Detail page available to project participants that is similar to the Usage Controller Project Detail page. The project participant Project Detail page is accessible from the project name link in your left navigation bar when you have the project active. The Project Detail page for project participants is designed to provide information and links useful to a Project Manager or other project participants and does not include capabilities that are unique to a Usage Controller. Please see Project Participant's Project Details for more information.

Project Detail page - Usage Controller Content

This page contains the following selections and information:

Home

Click on this link to display your home page.

Group List

Click on this link to display a list of the groups in your active administration group hierarchy.

[Show Metrics]

Click on this link to display metric information for this project, including assets owned and assets reused.

[Delete]

Click on this link to remove this project from the library. No delete confirmation message will display.

- Deleting a group removes all direct associations of that group, such as profile, asset views, Asset Capture Engineers, Publishers, and reference models.
- You can delete a project that is the owner of one or more assets. Assets owned by the deleted group are reassigned to be owned by the deleted group's parent.
- You can delete a project that has been assigned participants. The participants will remain as library users for your library and will retain participation in their other projects. However, they will no longer have access to the deleted project.
- An alternative to deleting a Project is to inactivate it. Inactivating a project ensures that project history is kept, yet ensures no further work can be done by project participants unless and until it is reactivated.
- You **cannot** delete a group that has users reporting to it without first changing the users to report to a different group.

[View Requests]

Click this link to display the Group Requests page. From this page you can click the **[Details]** link to view asset requests.

General

The group name is shown at the top of this page, after the heading **Group Detail**.

This section displays the following:

General [Edit]

Click on this **[Edit]** link to display the Edit Group page, enabling you to edit the group name, description, parent group, and status. You can also specify whether the project is allowed to own assets.

Description

This is a description of the group.

Parent

This is the name of the group that this project is subordinate to in the library's group hierarchy. If you click on this link, the parent group's detail page will be displayed. The Enterprise Group is the only group that does **not** have a parent.

Type

This indicates the type of group you are viewing is a project. This field is not available for edit. A Project cannot be changed to be a non-project group.

Status

This is the status of the project, which indicates if the project is *active* or *inactive*. Inactive projects are not available to their participants, although historical information about project activity and assignments remains intact. As usage controller, you can reactivate a project if necessary.

Allowed to Own Assets

This indicates whether the project you are viewing is allowed to own assets.

Profile

Profiles may be assigned directly to a project or assigned indirectly through inheritance to a group above the project in the group hierarchical chain. If a profile is listed here, it is the profile directly associated with this project. If no profile is shown here, the project will inherit the profile from the next highest group above it in the hierarchy that has a directly associated profile. In either case, each project may only be associated with one and only one profile.

Profile [Edit]

You can click on this **[Edit]** link to display the Edit Group Profile page, which enables you to change or remove the profile directly associated with this project.

Asset Views

This section lists the asset view assigned to this project and their description. Optionally, a project may be associated with one or more asset views. Each asset view contains references to assets in the library, and is used to establish which assets are available to project participants. When asset views are used, they limit the assets available to those included in the associated asset views.

Asset View(s) [Edit]

You can click on this **[Edit]** link to display the Edit Group Asset Views page, which enables you to add or remove the asset views directly associated with this project.

Reporting Users

This is a list of users assigned to this group as their reporting group. A user's reporting group may be used by the Usage Controller in establishing access to reports. In addition, a user's reporting group may be used in library federation.

Reporting Users [Edit]

You can click on this **[Edit]** link to display the Edit Reporting Users page, which enables you to add reporting users to your project.

If your library is configured to use LDAP groups for mapping group membership and roles, project participation is assigned in the LDAP configuration, and cannot be changed on this page.

Publish Templates

This is a list of the one or more publish templates assigned to this project along with their corresponding descriptions. Each project may be associated with one or more publish templates. Publish templates are used to determine the publish parameters used for the publish or republish of assets owned by the project. Zero, one or multiple publish templates may be included in this list.

- If there are no publish templates associated with this project, assets owned by this project are published using a publish template inherited from a parent group.
- If there is one or more publish templates associated with this project, some or all of the templates may be mapped to a specific asset type. In this case, when assets of the type specified are published or republished, the type-specific publish template is used.
- One publish template associated with this project may be used as the default publish template. This publish template is not mapped to a specific asset type and is used for the publish of all assets owned by the project that do not have a type-specific template.

Any asset that is owned by this project is governed by a publish template associated with this group or one of the groups in its inheritance chain when submitted for publish or republish. See About Publishing Assets for more information.

Publish Templates [Edit]

You can click on this **[Edit]** link to display the Edit Group Templates page, which enables you to designate a default publish template and associate a template with an asset type, if desired.

Properties

If you Library is configured for group properties they would be displayed in this section. See your Library Administrator for more information.

Participants [Save Participant Changes] [Add Participants]

This table includes the users assigned to this project, although only the first one hundred records will be displayed at any one time. The participant table enables you to add users as participants for the project and designate the roles those participants will play in the group, if any. For more information on working with a user/participant table, please see Participant/Role Management.

If your library is configured to use LDAP groups for mapping group membership and roles, project participation is assigned in the LDAP configuration, and cannot be added to or changed on this page.

Adding a User to the Project

To add a new user to the project, click on the **[Add Participants]** button. The Add Participants page displays.

Assigning Roles to Project Participants

To assign a role to an existing participant, select the appropriate check boxes in the *Roles* column of the participant's row. For example, you can assign a user the role of Asset Capture Engineer, Asset Owner, Publisher, or a custom role. The responsibilities of assigned roles will be scoped to the project. See Library Roles for more information.

Save Participant Changes

When you are finished updating the Participants table, click on the **[Save Participant Changes]** link or **Save** button to save your changes.

Create New Project

This page enables the creation of a new project. If you are a Usage Controller, you can display this page by clicking on the **[Create New Project]** link from a Group List page.

New Project page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display your Group list page.

Parent Group Name

Choose the group from the drop-down list that this project will be subordinate to in your library's group hierarchy. Identifying a parent group designates the placement of this project within your library's group hierarchy.

Project Name

Enter a unique name for the project.

Description

Enter a description for the project.

Allowed to Own Assets

Select an option to indicate whether the new project is allowed to own assets.

Project Manager Selection [Create Project]

Select the initial project manager assigned to this project by clicking the appropriate check box in the Project Manager column of the user table. If the desired Project Manager is not available in the list, use the top row of the table to enter search criteria and click on the **Run** button. All Project Managers that match your selection criteria will display as a result.

Once you have entered the required information, click on the **[Create Project]** link to create the project for your library. Upon creation, the Project Detail page will display to enable you to add, modify or remove information about the project.

Button

When you are finished creating a New Project, click on the following button choice.

Create Project

Once you have entered the required information, click on this button to create the project for your library. Next, a Project Detail page will display to enable you to add, modify or remove information about the project.

Non-Project Groups

A non-project group is created to provide a work context available to project users through inheritance and/or to provide context for the assignment of asset ownership responsibilities of asset creation, update, publish, asset owner acquisition approvals, etc. without the aspects of project participation for asset searching and usage activities. Non-project groups, in conjunction with projects, enable a hierarchical assignment of Asset Capture Engineer, Asset Owner and Publisher roles, as well as any custom roles your library uses for specific governance process. Non-project groups also enable the association of asset views, profiles and reference models into your group hierarchy at the necessary position. Non-project groups are super-ordinate to projects in the group hierarchy. Each project inherits information from the non-project group(s) above it in the hierarchy.

Non-project groups can be established to:

- Enable consolidation of asset registration (reuse) report information across multiple projects.
- Enable asset view, profile, and reference model assignment across projects at various levels within the organizational group hierarchy.
- Enable assignment of Asset Capture Engineer, Asset Owner, Publisher and/or custom governance roles across projects at various levels within the organizational group hierarchy.
- Serve as an ownership context for assets outside of Project involvement.
- Group metrics are available from a non-project Group's detail page. This page is available to you if you are a Usage Controller.

See About Groups for more information.

About Projects

In setting up and maintaining your library, a Usage Controller will create "projects" to facilitate the work to be done and the reporting required by your organization. Projects are created to provide a context for asset searching and asset registration as well as a means of collaboration between project participants. For example, as an Asset User, any asset search, research, or acquisition work you perform is done within the context of your active project. If you are assigned more than one project, only one project is active for you at any time. Switching to a different project will change the context you are working in.

A project's work context may include:

- published assets that are available to project participants.
- reference models that are available to project participants.
- default classification criteria for asset searches.
- sort classifier settings that are used by default to organize the asset tree for project participants.
- assets that can be used to acquire other assets for this project, if your library is configured to support asset-based acquisition.

Library Configuration for Project Context

If you are a Usage Controller, you can designate the working context for a project as follows:

- Associate the project with a profile. A profile identifies information to be used as default settings for classification criteria for asset searches and sort classifiers for default asset tree organization.
- Assign one or more Project Managers to the project.
- Specify whether or not a Project Manager can add new library users to be assigned to their project.
- Assign one or more users to participate on the project. Project users can search for assets within the context of their project, research those assets, and request an asset be acquired for the project.
- Designate whether the published assets available to project participants must be included in asset views associated with the project. Asset views are optional for a project. If a project is associated with one or more asset views, only those assets referenced by the project's asset views are available to the project. If a project is not associated with any asset views, all assets in the library are available to the project.
- Associate one or more reference models with the project. Reference models are optional for a project. If a project is associated with one or more reference models, project users can conduct searches by navigating the reference model.

In addition, if your library is configured to support asset-based acquisition your project may have one or more assets assigned to the context of the project. Assets are assigned project context by an Asset Capture Engineer responsible for the assets. Assets within the context of the project can potentially acquire assets for use by the project. See About Asset Acquisition for more information.

Your Personal Project

If you have a designated user account in your library, when it was created your application automatically created a project for this account. This project, often called your personal project or sandbox project, is named with your account name and you are assigned as a user to this project.

Your personal project enables you to have access to library assets as an Asset User, whether or not you are assigned to any other project.

Active Project

As an Asset User, the work you perform to find assets, research assets, or request to acquire them is performed for a particular project. One or another of your projects is considered *Active* project at any time during your work session. The work you perform is always performed for the *Active* project. For example, if you create an Asset Query specification it is created for the project you have active at the time of creation and is associated with this project only.

In addition, the assets displayed in your asset tree are the assets available to your active project. This is also true for the assets displayed as a result of a search. The assets available for a project include all assets referenced by the active project's asset view(s) (if it uses asset views) that meet the classification criteria of its profile. The assets in your asset tree are displayed in groups according to the sort classifiers from the active project's profile by default.

You are able to change your active project by selecting a different project or connection.

View/Edit Group Detail

This page displays the detail information for a non-project group. It includes information and links corresponding to the tasks performed by a Usage Controller. If you are a Usage Controller for a group, you can display this page by clicking on a group name link shown on various pages, such as the Group List page or Profile Detail page. It also displays when you create and save a new group.

This page displays detailed information for a group not designated as a project. From this page you can:

- View and edit information about this group, including its name, description, parent, children, manager, and whether or not the group is allowed to own assets.
- View metrics associated with this group, such as the assets it owns and acquisition information on this assets.
- View and modify the project type to change the group into a project.
- View and edit existing associations in place for the group, such as a Profile, Reference Models, Asset Views, Reporting Users, and Publish Templates.
- View and assign users to the Asset Capture Engineer, Asset Owner and/or Publisher roles for this group.
- View and assign users to one or more custom roles for this group, if applicable.

Group Detail page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display a list of the groups in your active administration group hierarchy. This link is only shown if you are a Usage Controller.

[Show Metrics]

Click on this link to display metric information for this project, including assets owned by this project and acquisitions of these assets by projects.

[Delete]

Click on this link to remove this group from the library. A delete confirmation message will display.

- Deleting a group removes all direct associations of that group, such as profile, asset views, Asset Capture Engineers, Publishers, and reference models.
- You **cannot** delete a group that is the parent of one or more other subordinate groups.
- You **cannot** delete the enterprise group.
- You **cannot** delete a group that has users reporting to it

[View Requests]

Click this link to display the Group Requests page. From this page you can click the **[Details]** link to view asset requests.

General

The group name is shown at the top of this page, after the heading **Group Detail**.

This section displays the following:

General [Edit]

You can click on this **[Edit]** link to display the Edit Group page, enabling you to edit the group name, description, parent group, and manager. You can also specify whether the group is allowed to own assets.

Description

This is a description of the group.

Parent

This is the name of the group that this group is subordinate to in the library's group hierarchy. If you click on this link, the parent group's detail page will be displayed. The Enterprise Group is the only group that does **not** have a parent.

Children

This is a list of the names of groups that are subordinate to this group in the library's group hierarchy. If you click on any of the name links in this list, the corresponding group detail page will be displayed.

Manager

This is the name of the manager of this group. Unlike a project manager, a name given here does not have to be a user of the library. This name is used for informational purposes only, and is not used by your library in any other way.

Type

This indicates the type of group you are viewing is a non-project organizational group. This field is not available for edit. A non-project group can be changed into a project if it is not assigned as parent to another group. See the information on General **[Edit]** above.

Allowed to Own Assets

This indicates whether the group you are viewing is allowed to own assets.

Profile

If a profile is listed here, it is the profile directly associated with this group, along with its description. If no profile is shown here, the group will inherit the profile from the next highest group above it in the hierarchy that has a directly associated profile. Profiles may be assigned directly to a project or assigned indirectly through inheritance to a group above the project in the group hierarchical chain. In either case, all projects are associated with one and only one profile.

Profile [Edit]

You can click on this **[Edit]** link to display the Edit Group Profile page, which enables you to change or remove the profile directly associated with this group.

Asset Views

This is the asset view(s) and their description, if any, assigned to the group. Each group may be associated with one or more asset views. An asset view contains references to assets in the library, and is used to establish which assets are available to the active project (the project a user is currently working in). Asset views are optional, but when they are used, they determine which assets are available to a project for searching and for display in the user's Left Navigation Bar Asset Tree.

Asset View(s) [Edit]

You can click on this **[Edit]** link to display the Edit Group Asset Views page, which enables you to add or remove the asset views directly associated with this group.

Reference Model(s)

This is a list of the reference model(s) and corresponding description(s) assigned to the group. Each group may be associated with one or more reference models. A reference model is used to provide navigation to assets within your library.

Reference Model(s) [Edit]

You can click on this **[Edit]** link to display the Edit Group Reference Models page, which enables you to add or remove the reference models directly associated with this group.

Publish Templates

This is a list of the one or more publish templates assigned to this group along with corresponding descriptions. Each group may be associated with one or more publish templates. The templates included are used to determine the publish parameters used for the publish or republish of assets owned by the group. Zero, one or multiple publish templates may be included in this list.

- If there are no publish templates associated with this group, then when an asset owned by this group is published, the publish template used will be inherited from a parent group.
- If there is one or more publish templates associated with this group, some or all of the templates may be mapped to a specific asset type. In this case, when assets of the type specified (owned by the group) are published or republished, the publish template used is the one associated with that asset type.
- One publish template associated with this group may be used as the default publish template. This publish template is not mapped to a specific asset type and is used for the publish of all assets (owned by the group) that are not of a type associated with a type-specific publish template.

Any asset that is owned by this group is governed by a publish template associated with this group or one of the groups in its inheritance chain when submitted for publish or republish. See About Publishing Assets for more information.

Publish Templates [Edit]

You can click on this **[Edit]** link to display the Edit Group Templates page, which enables you to designate a default publish template and associate a template with an asset type, if desired.

Properties

If you Library is configured for group properties they would be displayed in this section. See your Library Administrator for more information.

Properties [Edit]

You can click on this [Edit] link to display the Edit Group Properties page, which enables you to change the properties associated with your group.

Role Assignments [Save Role Changes] [Add Users]

This table includes the users assigned roles for this group, although only the first one hundred records will be displayed at any one time. In addition, it indicates which users, if any, report to this group. The user table enables you to view role assignments made for the group and remove roles when necessary. It does not allow you to remove the designation for reporting user. Rather, you must do this by assigning the user to a new reporting group by using the user detail page or the group detail page for the new reporting group. For more information on working with a user table, please see Participant/Role Management.

To add a new user for the purpose of role assignment or reporting designation, click on the [Add Users] link. The Add Users page displays.

To change a role assignment for an existing user, select or deselect the role(s) you want to change. Note that removing the ACE (Asset Capture Engineer) role assignment removes the user's role for the group, but does not affect the user's project participation for any subordinate projects.

When you have finished updating the Role Assignments table, click on **[Save Role Changes]** link or **Save** button at the bottom of the page to save your changes.

If your library is configured to use LDAP groups for mapping group membership and roles, Role Assignments are assigned in the LDAP configuration, and cannot be added to or changed on this page.

Create New Org Group

This page enables the creation of a new, non-project group for your library within the active administration group. If you are a Usage Controller, you can display this page by clicking on the **[Create New Group]** link from the group list page.

New Group page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display your Group list page.

Parent Group Name

Select the group from the drop-down list that this new group will be subordinate to in the enterprise group hierarchy. Selection of the parent group designates the placement of this group within your current group hierarchy.

Group Name

Enter a unique name for the group.

Description

Enter a description for the group.

Manager (optional)

Enter the name of the individual to be designated as the group Manager. Note: this name is for information use only, and is not associated with any special behavior within your library for the group.

Allowed to Own Assets

Select an option to indicate whether the new group is allowed to own assets.

Buttons

When you are finished creating a new New Group, click on the following button of your choice.

Save

Once you have entered the required information, click on this button to create this group in the system. The Group Detail page will display, which enables you to add, modify or remove information about the group.

Clear

Click on this button to remove values from all the fields on this page.

Profiles

A profile is used to establish a working environment for project users. A profile is comprised of a collection of various parameter settings and associations between various library entities that are meaningful when applied to a project. For example, a project's profile can establish default values for various values used in asset searches. In addition, it establishes default asset grouping classifiers for the project users' asset trees. For these purposes, each project is associated with a profile.

A project may be directly associated with a profile. If not, the project will use the profile next available in its org group inheritance chain. If no custom profiles are established in your library, all projects will inherit from the default profile associated with the library's Enterprise Org Group. See the Enterprise Profile section below.

Project Profile

If you are an Asset User, the profile associated with your active project determines which assets are available to you, how they are displayed in your asset tree, and what default settings will be populated into search specifications you create.

- Assets displayed in the asset tree in your left navigation bar are those that meet the classification criteria established in your project profile.
- Assets displayed in your asset tree are grouped, by default, according to the sort classifier settings established by your active project's profile. (You can override these settings by clicking on the *configure tree view* icon on your left navigation bar and customize the sort classifiers as desired.
- Search box search results will display only those assets that meet the profile classification criteria specifications, in addition to any search context and search string used in the search.
- Assets searched by any of your project's search specifications will be only those that meet the classification criteria in your project profile, unless you choose to remove or override these values in the search specification itself.

Profile Management

If you are a Usage Controller, you can:

- Create a profile that contains the settings you would like to use for one or more projects.
- Determine which project or projects you would like to associate with this profile.
- Create an association between the profile and one or more projects or organizational groups (org groups).
  - You can either go into the project's detail page and associate the project or go into the profiles detail page and associate the profile with one or more projects.
  - You can associate a profile with an org group, instead of directly with a project. In this case, all projects subordinate to the org group will be associated with the profile through inheritance, unless they are directly associated with a profile themselves.

The Enterprise Profile

Your library is initially established with a single organizational group called the enterprise organizational group. In addition, this enterprise organizational group is associated directly with the enterprise profile. If you are a Usage Controller for the Enterprise Group, you may rename an enterprise profile, but you cannot delete it or remove its direct association with the enterprise organizational group.

The enterprise profile serves as the default profile that is used in the absence of any alternative profile associated with a subordinate org group or project. For example, in a project-terminated branch of the enterprise's organizational group hierarchy, if none of the included org groups or the project itself has a direct association with a profile, the project will inherit the enterprise profile. Because all other organizational groups created for the enterprise will be subordinate to the enterprise organizational group, this assures that each project will use the enterprise profile unless one of the other organizational groups in its branch of the hierarchy overrides it with a direct association to a profile of its own. In the case where an org group in the project's inheritance chain does have an association with a profile, the project will inherit that profile instead, unless either a subordinate org group or the project itself have a directly associated profile.

Following are some characteristics relating to the enterprise profile:

- It is established upon creation of your library.
- There can be only one enterprise profile. Any other profile that is associated with an organizational group closer to the project in a particular branch of the hierarchy (or with the project itself) will override it.
- You can change or rename the enterprise profile, but you cannot delete it.
- You cannot remove the enterprise profile's direct association to the enterprise organizational group.

Profiles List

This page displays a list of profiles that exist in the active administration group. Each row contains information about a profile.

If you are a usage controller, you can display this page by:

- Clicking on the Profiles item in your left navigation bar.
- Selecting Profile from the drop-down list in the Custom Search and performing a search. The profile list resulting from a search can optionally be limited to those profiles that meet the requirements of the search string entered into the Custom Search text area.

From this page you can:

- View the list of profile information.
- Click on a profile name link to display its detail page.
- Click on an organizational (org) group name link to display its detail page.
- Click on the **[Create New Profile]** button to display the Profile create page.

Profile List page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

[Create New Profile]

Click on this link to display the Profile create page. Only enterprise-scoped Usage Controllers can create a profile.

The following information is displayed for each existing profile. This information is displayed for informational purposes and is read-only.

Profile Name

This is the name of the profile. The profile name is unique within your library. Click on this name link to display the Profile Details page.

Description

This is a text description of the profile.

Organizational Group

This is the name of the organizational group(s) to which the profile is directly associated. Click on a group's name link to display its detail page.

View/Edit Profile Detail

This page displays the detail information of a profile. If you are a Usage Controller, you can display this page by clicking on a profile name link from the profile list page. It is also displayed when you create and save a new profile.

On this page you can:

- View and modify profile name and description.
- View and Modify the profile classification criteria values.
- Assign this profile to a group or project.
- Remove this profile's direct association to group or project.
- View and modify the profile asset tree sort classifiers.
- View and modify the classifier columns displayed by default for asset lists.
- Delete the profile from the library.

Profile Details page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Profile List

Click on this bread crumb link to display the Profile List page.

[Delete]

Click on this link to delete this profile from your library. Only enterprise-scoped Usage Controllers can delete a profile.

- Deleting a profile removes all direct associations that groups have established with the profile. These groups will revert to their inherited profiles until a new direct association with an alternative profile is created.
- You cannot delete the enterprise profile or remove its direct association with the enterprise group.

General

The profile name is shown at the top of this page following the **Profile Details:** heading. The General section displays the profile description.

General [Edit]

Click on this link to display the Edit Profile page, enabling you to modify the profile name and description. Only enterprise-scoped Usage Controllers can edit a profile.

Description

Displays the text description of the profile.

Classification Criteria

This shows the current list of classifiers and their values established for this profile. Classification criteria are used by the system when determining which assets are viewable by a project's users. Only those assets that meet the classification criteria established for the active project's profile are viewable by the project users. Assets viewable by a project are also affected by any asset views associated with the project. In addition, classification criteria settings defined in the profile are used to pre-populate each new asset query or model based search specification. Search specification classification criteria established by profile can be overridden by an Asset User via editing the corresponding section of a search specification.

Classification Criteria [Edit]

You can click on this **[Edit]** link to display the Edit Classification Criteria page. This enables you to add, remove, or update the classification criteria for this profile.

Name

Displays the name of the classifier selected.

Value(s)

Displays the values of classifiers selected.

Groups

Groups that are directly associated with this profile are listed here. You can create a direct association of this profile with one or more groups by adding groups to this section. Alternatively, you can create the direct association from the Group Details page instead. If a group does not have a direct association with a profile, it inherits its profile from the first organizational group above it in the group hierarchy which has a directly associated profile.

Groups [Edit]

You can click on this **[Edit]** link to display the Edit Groups page. This page enables you to modify which groups are directly associated with this profile.

Name

A unique name for the group or project selected.

Description

Displays the text description of the group or project.

Asset Tree Sort Classifiers

Sort Classifier settings established for this profile are shown in this section. Sort Classifier settings determine the default groupings used to display the asset tree for project users (as well as the hierarchical order of the groups). Project users can override these default settings by configuring their asset tree.

Asset Tree Sort Classifiers [Edit]

You can click on this **[Edit]** link to display the Edit Asset Tree Sort Classifiers page. This page enables you to add, remove, or select different sort classifiers for this profile.

Classifier Columns For Asset Lists

Classifier column settings established for this profile are shown in this section. Classifier column settings determine the default columns used to display with assets in an asset list, such as a search result list or a list of assets in progress. Library users can override these default settings by configuring their user account or their search specifications.

Classifier Columns For Asset Lists [Edit]

You can click on this **[Edit]** link to display the Edit Asset Classifier Columns page. This page enables you to add, change or remove classifiers selected for display with assets in asset lists.

Create New Profile

This page enables the creation of a new profile. If you are an enterprise-scoped Usage Controller, you can display this page by clicking on the left navigation item for profiles, then clicking on the **[Create New Profile]** link on resulting profile list page.

Profile Create page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Profile List

Click on this bread crumb link to return to the Profile list page.

Profile Name

Enter a name for the profile you are creating. The profile name must be unique within your library. This is a required field.

Description

Enter a text description of the profile you are creating. This is an optional field.

Copy from

You can populate a new profile with the classification criteria and asset tree sort classifiers of an existing profile. If you choose to use the settings in an existing profile to populate this profile, select the name of a profile to copy from in the drop-down list. You can choose only one profile for this purpose. If you choose to create the profile from scratch, do not choose a profile name in the Copy From drop-down list.

Buttons

When you are finished creating a new New Profile, click on the following button of your choice.

Save

Click on this button to create this profile in the system. The Profile Details page will be displayed, which enables you to add, modify or remove profile values for classification criteria, org group associations, asset tree sort classifications and classifier columns for asset lists.

Clear

Click on this button to remove values from all the fields on this page.

Edit Profile page

This page enables the creation of a new profile, or allows you to edit the name and description of an existing profile. If you are an enterprise-scoped Usage Controller, you can display this page by clicking on the left navigation item for profiles, then clicking on the **[Create New Profile]** link on the resulting profile list page to create a new profile, or by clicking on an existing profile and then clicking on the *General* **[Edit]** link.

Edit Profile/New Profile page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Profile List

Click on this bread crumb link to return to the Profile list page.

Profile Details

Click on this bread crumb link to return to the Profile Details page.

Profile Name

Enter a name for the profile. The profile name must be unique within your library. This is a required field.

Description

Enter a text description of the profile. This is an optional field.

Copy from

You can populate a new profile with the classification criteria and asset tree sort classifiers of an existing profile. If you choose to use the settings in an existing profile to populate this profile, select the name of a profile to copy from in the drop-down list. You can choose only one profile for this purpose. If you choose to create the profile from scratch, do not choose a profile name in the Copy From drop-down list.

Buttons

When you are finished creating or editing your profile, click on the following button of your choice.

Save

Click on this button to save this profile in the system. The Profile Details page will be displayed, which enables you to add, modify or remove profile values for classification criteria, org group associations, asset tree sort classifications, and classifier columns for asset lists.

Clear

Click on this button to remove values from all the fields on this page.

Cancel

Click on this button to return to the previous page without saving any changes.

Edit Group Profile page

This page enables you to change or remove the profile directly associated with this group. To add or remove a profile association, click on the radio button corresponding to the profile you wish to directly associate with your group, or click on **None** to remove the direct association. Removing direct association will cause the group to revert to its inherited profiles until a new direct association with an alternative profile is created.

A profile is used to establish a working environment for project users. For more information, see About Profiles.

From this page you can:

- Change the profile that is directly associated with your group.
- Remove the profile which is directly associated with your group.

Edit Group Profile page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display a list of the groups in your library.

Group Detail

Click on this bread crumb link to display the details for your group.

Each group is inherently associated with a profile. A profile is used to establish a working environment for your group. You can either associate a profile with your group directly, or inherit the profile from the next org group in your group's inheritance chain. If none of the groups in the inheritance chain specify a direct profile association, all projects will inherit from the default profile associated with the library's Enterprise Group.

Select a profile to associate directly with your group, or remove the direct association by selecting **None**.

> Click on the **Save** button to record your changes and return to the Detail page.

> Click on the **Cancel** button to return to the Detail page without recording any changes.

Edit Groups

This page enables you to modify which groups you want to directly associate with a profile. If you are a Usage Controller, you can edit the groups that are directly associated with a profile by clicking on the *Groups* **[Edit]** link on the Profile Details page. You can associate a profile with an organizational group, instead of directly with a project. In this case, all projects that are subordinate to the org group will be associated with the profile through inheritance, unless they are directly associated with a profile themselves. From this page, you can:

- Associate one or more groups with a profile, or remove a previous association, by clicking on the selection box corresponding to the group.
- If you are editing the enterprise profile, you cannot remove its association with the enterprise group. Instead, you can modify the Enterprise profile, and associate it with other groups in addition to the enterprise group.
- As an alternative, you can choose to go to each group's Group Details page and select or remove a profile association.

For more information, see About Profiles and About Groups.

Edit Groups page content

The Edit Groups page contains the following selections and information:

Home

Click on this bread crumb link to display your Home page.

Profile List

Click on this bread crumb link to display the list of profiles for the active administration group.

Profile Details

Click on this bread crumb link to display the profile you are editing.

This page lists the groups that you can choose to associate directly with the profile. Select the check box next to each group you wish to directly associate with the profile, or clear the check box next to each group you want to disassociate from the profile.

Note that you cannot remove the enterprise group from the profile. Instead, you can modify the Enterprise profile, and associate it with other groups in addition to the enterprise group.

The following information is included for each group:

Name

The name of the group.

Description

The text description of the group.

Type

The type of the group.

Buttons

When you are finished selecting the groups to associate with your profile, click on the following button of your choice.

- Click on **Save** to record your changes to the profile.
- Click on **Clear** to remove all org group selections.
- Click on **Reset** to replace all current selections with the selections that existed when you first opened the Edit Groups page.
- Click on **Cancel** to close the window and ignore any input or changes you have made.

Edit Reporting Groups page

This page enables you to change the group to which this user will report.

To change the reporting group, select the radio button next to the group you wish to assign to this user. From this page you can:

- Assign users to this reporting group.

Edit Reporting Groups page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

User List

Click on this bread crumb link to display a list of the users in your library.

User Details

Click on this bread crumb link to display the details for the user you are currently editing.

Select the reporting group you wish to assign to this user.

- All library groups within the scope of the active administration group are listed, with the radio button activated for the user's current reporting group.
- You can choose a new reporting group for this user by clicking on the radio button corresponding to the desired new reporting group.
- You cannot remove a reporting group from a user, because they are required to have one. However, you can assign them a different reporting group. Each user has only one reporting group.

> Click on the **Save** button to record your changes and return to the Detail page.

> Click on the **Cancel** button to return to the User Details page without recording any changes.

Edit Reporting Users page

This page enables you to add reporting users to this group. You cannot remove a user reporting to this group, because each user must have a reporting group. Instead, you can change the user's reporting group on the User Detail page, or by going to the new reporting group's detail page to add the user to the new group.

To add a reporting user, select the user from the **Available** list, and click the right-arrow button to assign the user to the reporting group.

To remove a reporting user, select the user from the **Assigned** list, and click the left-arrow button to remove the user from the reporting group. Note that this action will only remove the user if you have not already assigned the user to the group with a previous **Save** action.

From this page you can:

- Assign users to this reporting group.

Edit Reporting Users page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display a list of the groups in your library.

Group Detail

Click on this bread crumb link to display the details for your group.

Select one or more reporting users you wish to assign to your reporting group.

› Click on the **Save** button to record your changes and return to the Detail page.

› Click on the **Reset** button to return to revert your current changes back to their previously saved values.

› Click on the **Cancel** button to return to the Detail page without recording any changes.

Relationship Contexts

This page enables a Usage Controller to view information about asset acquisition requests, regardless of their approval status.

- If your library is configured to support project based acquisition, assets requested for acquisition by a project have an associated context detail page page displaying information related to and gathered in the request approval process associated with the acquisition request.
- If your library is configured to support asset-based acquisition, the relationships established in the acquiring assets include a "relationship context." In this case, for example, the relationship context detail page provides the means to display general information about the acquisition request, such as: request date, status, assets involved, and the users and groups involved. In addition, the relationship context page may also display additional information gathered during the request approval cycle.

If you are a Usage Controller, you can display this page by clicking on the **Relationship Contexts** item on your left navigation bar. This page enables you to view or delete relationship contexts created as a result of acquisition activity.

Specifically, this page provides:

- A displayed list of relationship contexts generated by acquisition activity within your active administration group hierarchy. Note: depending on how many requests there are, this list could be truncated to display the first several, according to the sort and/or filter currently in effect on this information.
- For each request shown, the information displayed includes the name and version of the asset to be acquired and of the acquiring asset (if asset-based acquisition is used), the name of the project context, name of the acquisition relationship, request status, context status and date of the original request.
- The capability to apply a filter in order to limit the contexts displayed.
- The capability to sort the displayed contexts.
- A link to display the details of the context by clicking on **[Details]**.
- A **[Delete]** link, which enables you to delete a context when it is no longer useful.

Manage Relationship Context Contents

The Manage Relationship Contexts page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Relationship Context Table

A table of information on the contexts.

The Manage Context table contains the following information:

Actions

This column offers:

- The ability to apply or remove a filter to the list of contexts displayed. See below for more information on filtering and sorting your requests.
- **[Details]** link to display the detailed information of the context.

- **[Delete]** link to enable you to delete the context associated with a request.

Acquired Asset

This column the name and version of the acquired asset.

Acquiring Asset

This column the name and version of the acquiring asset. This column is only populated if your library supports asset-based acquisition and when the context shown relates to a request to acquire an asset for another asset.

Project Context

This column provides the name of the project designated as the project context for the acquiring asset. This column is only populated when there is an acquiring asset for this context.

Relationship Type

This column shows the relationship type used for the acquisition request associated with the context. This column is only populated when there is an acquiring asset for this context. In addition, there is no relationship type associated with a context that represents a *Revoked* asset registration.

Request Status

This column depicts the current status of the request associated with the context, and will reflect the stage of the process this request has reached according to your library's process configuration for acquisition requests.

Context Status

This column depicts the current status of the context itself, and will display either "Registered" or "Revoked" according to your library's process configuration for acquisition requests.

Date

This is the date and time of context creation request.

Filtering

There is a row beneath the context table column headings that offers filter widgets in the Acquired Asset, Acquiring Asset, Project context, Relationship Type, Request Status and Context Status columns. A filter is used to limit or modify which contexts are displayed in your list. For example, by entering a search string of **Geo** in the Acquired Asset column and clicking on **Run** you can apply a filter to only show those contexts related to acquisition requests made for assets whose name includes *Geo*.

Run

Click on this button to apply the filter you have designated in the text boxes of each column.

Clear

Click on this button to clear all the text boxes. Note: to clear your current contexts displayed, first choose **Clear**, then **Run**.

Sorting

Primary Sort, ascending or descending

If you wish to sort the context rows by a column value, simply click on the column name. An ascending sort is applied by default. You can switch the sort order to descending by clicking on the column name again. The triangle icon depicts whether the rows are sorted by the values in this column and if so, whether ascending or descending order is being used.

See context detail page for information.

Users

An individual who has an established user account in the library is referred to as a user. A user account is created for each individual who will access the library. When you want to use the library, you will login using your User Account name and the password established for your account. Depending on the configuration of your library, users may be able to create their own accounts (by simply logging in) if they have the necessary credentials in the LDAP/authentication system used by the library. Alternatively, a Usage Controller may be required to establish a new user account. (Please see About LDAP for information on the authentication configuration of your installation.) In any case, a Usage Controller is needed to assign any roles beyond asset user to the new account as well as any projects beyond their private workspace.

User Accounts

When your library is created, one or more User Accounts are established that are assigned the role of Usage Controller. Based on your LDAP configuration, some user information is drawn from your LDAP/authentication system. Other information, unique to your use of the library, is entered into your user account by the Usage Controller or by the user themselves.

User Accounts may include the following information (* indicates required information):

- *Full name (first and last name)
- *Account name
- *E-mail address, which will be used by the system to generate notices pertinent to the user's role(s) and tasks.
- Address and phone number
- Password
- Reporting group
- Forum Notification *On* or *Off* designation.
- User and group roles that are applicable for the account. The tasks each user can perform are determined by the role or roles they are assigned in their User Account.
- Projects to which this user is assigned.
- User active status (whether active or Inactive). If a user is inactive, they cannot login to the library.

Manage My Account

You can maintain some of the information in your own account, whether or not you are a Usage Controller, by clicking on the **[Manage my Account]** link at the top of your home page. Clicking on this link displays the User detail page for your account in the library. You are able to add or modify information on your account with the exception of user and group roles, project assignments, and other items managed by your LDAP/authentication system or users with the Usage Controller role assignment.

Users List

This page displays a list of users who have been assigned user accounts to access groups within your library. In addition, if the active administration group is the Enterprise Group, this page provides access to a special user account associated with the application itself. This special user account is called the "Repository Application" asset user.

If you are a Usage Controller, you can display this page by clicking on **Users** in your left navigation bar.

From this page you can:

- View a list of active and inactive library users and their e-mail addresses.
- Access the detail page for the Repository Application account in order to modify its assigned reporting group.
- Modify the user table filter to display various sets of users.
- Click on a **[Select]** link to display a user's detail page.
- Click on the **[Create New]** link to display the Create Users page.

User List page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

[Create New]

Click on this link to display the Create Users page, enabling the creation of a new user account.

[Select] **Repository Application**

Click on this link to display the User Detail page for the Repository Application user, which enables you to modify the reporting group assigned. The Repository Application user is only shown when the active administration group is the Enterprise Group.

The Repository Application account may be used for such things as providing the account recorded as the "submitter" of assets produced by automation or for use as the "responsible user" identified for Visible Asset Sources or Remote Asset Sources established for your library. In both of these example uses of the Repository Application account, the Reporting Group assigned to this user is used as a means of establishing the owning group for the assets coming into your library's asset source, and also to determine the publish templates to be used for the publish of these assets. Another use of the Repository Application account is to provide a designation for the "locking user" for governing the asset submission process. In this case, *Repository Application* is shown as the locking user on the available assets page when an asset is submitted for publish. See your System Administrator for more information.

User Table

The list of standard user accounts is presented in the form of a user table. Each row contains the user's name and their e-mail address as well links to the account detail and other information fields. This user table is initially displayed with the first several user records existing for your library. To display records for a different set of users, you can use the table filter in conjunction with values corresponding to one or more of the table columns. In addition to the standard user information, such as Full Name and email address, the User Table may include columns of information for custom user attributes, according to your library's configuration.

Each user row in the User Table also has a corresponding **[Select]** link to provide you access to the user detail page.

See User Table for more information.

View/Edit User Detail

This page displays the detailed information of a User Account. If you are a Usage Controller, you have access to creating and maintaining user accounts for groups within your library. Display the user detail page by clicking on any page that has a user name link or a **[Select]** link within a user table. In addition, individual users can display their own user information by clicking on the **[Manage my Account]** link at the top of their home page.

User Detail page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

User List

Click on this bread crumb link to display your User List page.

[Inactivate]

Click on this link to prevent this user from logging into the library.

- Inactivating a user means that the User Account is not available for use. An inactive user cannot enter the library by entering this account name and password.
- Once a user has been inactivated, this link changes to **[Activate]** on the user account detail page, and only an Enterprise-scoped Usage Controller can reactivate the user.
- Inactivating a user removes all of their role and project assignments.
- You can inactivate any user, except:
  - A user who is the last Usage Controller in the enterprise. You must first assign this role to another user.
  - A user who is currently assigned as the only Project Manager for a project. You must first reassign the Project Manager designation to someone else.
  - A user that holds roles outside of the current group.

[Activate]

Click on this link to enable the user to again log into the library. Because an inactivated user reverts to reporting to the Enterprise Group, only Enterprise-scoped Usage Controllers can activate a user.

- Activating a user means that the User Account is again available for use.
- You will need to reassign the applicable roles and projects, as these assignments are cleared from the account when it is inactivated.
- Once a user has been activated, this link changes to **[Inactivate]** on the user account detail page.

[Synchronize]

Click the **[Synchronize]** link to synchronize LDAP and user information for this user.

General Information

Information including the user's name, Email address, Reporting Group and Role assignments is displayed for your information in this section.

Contact Information

Full Name

This is the full name of the user, displayed from your library's authentication system.

Email

This is the e-mail address for this user, displayed from your library's authentication system. It is the e-mail address used for all library notification sent to this user.

Other fields

If your library has been configured to display additional fields of user information, they will be included in this section.

Contact Information [Edit]

Click on the **[Edit]** link for Contact Information to display the Edit Contact Information page. This action provides you access to edit only the fields that are managed outside of the authentication system used by your library. For example, information provided by your LDAP system are displayed as read-only fields.

Reporting Group

This is the name and description of a group designated as the reporting group for this user. Reporting Group may be used to enable you to see reports assigned to this group. See report entries for more information. A user's reporting group may also be used for some users whose accounts are used for asset production automation and library federation. See the System Administration Guide for more information.

Reporting Group [Edit]

If you are a Usage Controller, you have an **[Edit]** link for this section that you can click on to display the Edit Reporting Groups page, enabling you to change the group to which this user will report. If your library is configured to use LDAP groups for mapping group membership and roles, the Reporting Group is assigned in the LDAP configuration, and cannot be changed on this page.

Roles

The ability to view information and perform tasks in the library are controlled through the user role assignments. User roles are held library-wide, and are not scoped to a group. All users have the Asset User role, which provides the ability to search and view assets in your library. If you are an enterprise-scoped Usage Controller, this section allows you to configure whether or not the user is also assigned the Library Administrator role. Only users who are already Enterprise-scoped Usage Controllers can be assigned the Library Administrator role. If your library is configured to use LDAP groups for mapping group membership and roles, the user role assignments are assigned in the LDAP configuration, and cannot be changed on this page.

Preferences

This section provides a set of choices you can make for a user's account.

Local Time Zone

This section displays the current date and time setting for your system. You can change the time zone to match the user's local time zone by selecting it from the drop down box.

Local Time

This section displays the local time, according to the Local time zone currently designated.

Auto Save Interval (in seconds)

When editing an asset the edited asset is auto saved every X seconds. To change the interval, enter a new time in seconds and click the **[Set]** link.

Notify me about replies to posts...

You can change the indicator for Forum Notification by clicking on this check box to add or remove a check mark. By default, the indicator is set to *OFF*. If the Forum Notification box contains a check mark, it means that this user will receive an email notification when someone replies to a topic this user originated in a discussion forum. In addition, If this user is subscribed to an asset, they will automatically receive an email message in response to every post on that asset's discussion forum.

Include total count of assets in query results...

Click this check box if you wish to see the total number of assets found when performing asset queries. Totals will be displayed at the bottom of the Search Results page. Note: Enabling this option may cause queries to run slowly.

Properties

If your library is configured to include property information for users, this section will display the user properties set for your account. User properties, if used, will be specific to your library.

Properties [Edit]

You can click on this [Edit] link to display the Edit User Properties page, which enables you to change the user properties for your account.

Group Associations [Save Association Changes] or Group Associations [Manage Associations]

The Group Associations table enables you to assign group roles to the user. By selecting the appropriate check box, you can assign a user the role of Asset Capture Engineer, Asset Owner, Publisher, Usage Controller, or any custom roles defined for your library. You can also designate whether or not the user is a Project Manager, for those groups that are projects.

To change group associations for a user, select the roles you want to assign or remove, then click on **[Save Association Changes]** to save your changes. Note that removing the ACE (Asset Capture Engineer) role assignment from a group removes the user's role for the group, but does not affect the user's project participation for any subordinate projects.

If you are a Usage Controller viewing your own user details, click on **[Manage Associations]** to enable editing. Select the roles you want to assign for the groups you are assigned to as Usage Controller, then click on **[Save Association Changes]**.

If your library is configured to use LDAP groups for mapping group membership and roles, Group Associations are assigned in the LDAP configuration, and cannot be changed on this page.

For more information on working with Roles and Project Participants, see About Participant/Role Management and Participant Management.

See your Library Administrator for more information on custom roles.

The columns in the Group Associations table are described in greater detail below.

Project User

This column indicates the Project groups the user is assigned to. If a box corresponding to a group contains a check mark, it means that the user is designated as a participant on that project. To change the user's project user status, go to the appropriate row and click on the check box to select/deselect it. Note that the Project User check box only displays next to a group when that group is designated as a project. You can only assign users to participate in a group when that group is designated as a project.

Roles

This column indicates what group roles, if any, are assigned to the user for each group shown. If a box contains a check mark, it means that the user is assigned that particular role for that group. To change the user's role for a particular group, go to the appropriate row and click on the desired check boxes to select/deselect them. If your Library Administrator has customized the system to utilize custom roles, those roles will display here along with the standard roles of Asset Capture Engineer, Asset Owner, Project Manager, Publisher, and Usage Controller. See Library Roles for more information on standard and custom roles.

Role-specific asset presentation

If your library is configured to use role-based asset information presentation, the Group Roles assigned to a user may also affect the user's asset information displayed. In this case, the user will be offered a set of asset detail information views that correspond to the roles they are assigned for their active project as well as the groups above it in your library's group hierarchy. Please see Library Roles for more information.

Group Name

The name of the groups corresponding to participation and role assignments.

Group Type

The type of group column indicates whether the group is a project or a non-project group. A project is a type of group you can assign users to. Projects are used for asset consumption activity, such as searching for assets, researching assets and potentially acquiring an asset for reuse on the project. A value of "Group" indicates a non-project group that is used to provide context for role assignment, governance, asset ownership, asset filtering, etc. Users cannot be assigned as participants on non-project groups.

Group Description

This is a text description of the project or group.

Create New User

If you are a Usage Controller, you have access to creating and maintaining user accounts for your library. Display the Create Users page by selecting **Users** from your left navigation bar and clicking on the **[Create New]** link available at the top of the resulting User List page. You can also create library user accounts for the purpose of assigning roles in your library by clicking on the **[Create Users]** link of the Add Users to Group page.

The Create Users page enables the creation of a new library user account. More explicitly, you can use this page to enable a user to access the library if their account has credentials in your LDAP/authentication system. As a Usage Controller, you cannot create an account in the library if the account does not already exist in your authentication system.

Create Users Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

User List

Click on this bread crumb link to display the user list page.

[Create Selected Users]

Click on this link after you have selected one or more records from the user table for account creation.

[Cancel]

Click on this link to return to the User List page without making any modifications.

User Table

This page contains a user table, which is initially displayed without user records. To display records from your authentication system, you will use the table filter in conjunction with values corresponding to one or more of the table columns. Once one or more records are displayed, select the records you want to add as library users then click on **[Create Selected Users]**.

See User Table for more information.

Buttons

When you are finished creating a New User, click one of the following button choices.

Create Selected Users

Click on this button after you have selected one or more records from the user table for account creation.

Cancel

Click on this button to return to the User List page without making any modifications.

Edit User Properties Popup

If you are a Usage Controller, you can edit the properties for a user by clicking on the **[Edit]** link in the Properties section of the User Details page. In addition, individual users can edit their own user properties by clicking on the **[Manage my Account]** link at the top of their home page, then clicking on the **[Edit]** link next to Properties.

The properties you see depends on what has been configured in your library for users. See your Library Administrator for more information about the configuration aspects of your library.

Some properties will accept a text, numeric, date or boolean value, for example. Other properties may indicate the need for you to name (or browse to) a file. Still others require a reference to a file stored outside of the application. Depending on the type of property, input is supported by an appropriate widget. In some cases, a default value is provided, and a value list may be available to choose from.

Properties

This section lists the various properties associated with the user account.

Buttons

Save

Click on the **Save** button to save your changes and return to the User Detail page.

Cancel

Click on the **Cancel** button to return to the User Detail page without saving any changes.

Create a Library User

If you are a Usage Controller, you have access to creating and maintaining user accounts for your library. This page enables the creation of a new library user account.

Create a Library User page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

User List

Click on this bread crumb link to display the user list page.

Account Name

Enter the account name for the library user you are creating.

Buttons

When you are finished entering the user information, click one of the following button choices.

Submit

Click on this button to create the new user.

Cancel

Click on this button to return to the prevoius page without making any changes.

User License Management

An active User in any library of your installation consumes what is termed a *Named License*. A licensed user is allowed to be active in any number of your libraries.

Your installation may have a fixed number of named licenses available, based on an agreement between your organization and Akana, Inc. In this case, the maximum number of named licenses is controlled for your installation.

When the number of named licenses is at the limit, User creation and activation are restricted, but not completely disabled. For example, since a named license entitles a user to be defined in any number of installation libraries, User creation for a given library is limited to users that are already active in other libraries. Similarly, an inactive User can only be reactivated if the user is already active in another library.

You may elect to release a named license by inactivating a user who no longer needs to use the library. However, you must remember to inactivate this user in all libraries in which they are currently active in order for this to have an effect on your named license usage.

Contact support@akana.com to arrange for additional named licenses.

User Table

The management of users for your library is generally performed by a user assigned the role of Usage Controller. In addition, users assigned the role of Project Manager can also add new users to your library (from their project detail page) for the purpose of assigning them as participants on their project. See the Project Manager's Add Participant Page for more information.

If you are a Usage Controller, you have a **Users** item available in your left navigation bar. You can also manage users from a group or project detail page.

The user table for your library is displayed by clicking on the **Users** item from the left navigation bar. The use of the user table and its sort/filter capabilities (as described below) is similar for both Usage Controllers and Project Managers (who have a participant table for their project). However, the remainder of this discussion is specifically related to the performance of user management by a Usage Controller with the ability to manage users.

The user table provides:

- A displayed list of the first hundred users in the active administration group (according to the sort and filter that is currently in effect).
- For each user shown, the information displayed includes their status, full name, user name and email address. In addition, depending on your library configuration, other attributes of the user may be included. Please see your System Administrator for information on configuring user attributes with system commands.
- The capability to apply a filter in order to limit the users displayed.
- The capability to sort the displayed users
- A link to the Create New page, enabling you to add new users to the library.

User Table Content

The user table section contains the following information and functionality:

User Table

Note: there is a message directly above the user table that describes what is being displayed. In many cases there are more users than can be displayed on the page at once; therefore this message clarifies that the user table will include only up to 100 users at once. If a user you are looking for is not currently displayed, you can change the filter and sort of the display in order to show the user you are interested in. See **Filtering** and **Sorting** below in this document.

Actions

This column includes a **[Select]** corresponding to each user. Click on the **[Select]** link to display the User Detail page.

Status

This column indicates an "Active" or "Inactive" status for each user included in the table. Inactive users are not able to login to the library.

Full Name

This is the user's full name (first and last names) from your library's authentication system.

User Name

This is the user's account name.

Email

This is email address of the user from your library's authentication system.

Custom User Attributes

Your participant table may display additional columns of user information, depending on your library configuration.

Filtering

There is a row beneath the user column headings that offers filter widgets for each column. A filter is used to limit or modify which user records are displayed in the table. For example, you can enter *Bruce Johnson* in the Full Name column in order to filter out all other users and display only Bruce Johnson. Alternatively, you can wild card your character string. An entry of *Johnson* would return all participants whose Full Name includes Johnson. An entry of Bru* would return all participants whose first name begins with Bru.

Run

Click on this button to apply the filter you have designated in the check boxes/text boxes of each column.

Clear

Click on this button to clear all the check boxes and text boxes. Note: to clear an applied filter, you can choose **Clear**, then **Run**.

Sorting

Primary Sort, ascending or descending

If you wish to sort the user rows by a column value, simple click on the column name. An ascending sort is applied (by default). You can switch the sort order to descending by clicking on the column name again. The triangle icon depicts whether the sort order is ascending or descending. Note: only the primary sort key is noted as ascending or descending.

Additional levels of sorting

If you click on one column name only, the result is a primary sort. If you wish to add a secondary sort, click on the secondary column name first, then click on the primary sort column name. Tertiary sorting is accomplished in a similar way: click on the tertiary column first, the secondary sort column second and the primary sort column third. Only the primary sort column has the choice of ascending or descending sort order.

Managing Library Projects - Project Manager

A Project Manager manages the users participating on the project, which are called participants. For example, a Project Manager can create new users and add them to the project, add or remove roles to the user account and be involved in asset requests for the project. They are also involved in creating report entries for project participants and may be involved in approving assets requested for the project.

Participant Management

Participant/Role Management tasks include:

- Managing user role assignments that are scoped to a particular group or groups (whether project and/or group hierarchy assignments)
- Managing library user project participation
- Adding library user accounts, according to your library configuration.

Users are assigned the ability to perform work for a project by associating their user account with a project as a participant. In addition, users can be assigned one or more roles to perform on behalf of a group or project.

Role-specific asset presentation

If your library is configured to use role-specific asset information presentation, the Group Roles assigned to a user may affect the user's asset information displayed when this project is active. In this case, the user will be offered a set of asset detail information views that correspond to the role(s) they are assigned for their active project and all the groups above it in your library's group hierarchy. Please see Roles for more information.

Usage Controllers and Project Managers

Two standard roles have various capabilities related to participant and role management as follows.

A Usage Controller can:

- Add new users to your library, edit their account information (with the exception of information managed by your LDAP/authentication system) and inactivate library users as necessary.
- Assign role(s) to a user scoped to a group and its subordinate groups by designating the user role assignment on the group or project detail page. See the Usage Controller Group Detail Page and the Usage Controller Project Detail Page.
- Alternatively assign one or more roles for groups and/or projects to a user through use of the user detail page.

A Project Manager working from their project detail page can:

- Add existing library users to their project as participants. See Participant Project Detail Page.
- Assign roles to project participants on the project detail page. See Participant Project Detail Page.
- Create new library users for the purpose of adding them to their project as participants, if your library configuration allows this. See Project Manager Add Participant Page.

For more information on participant management, see Participant Management.

Working in a Project

Your library is configured to facilitate the work to be done and the reporting required by your organization. In your library configuration, projects are used to provide a context for asset consumption activities and asset production associated with the project's development work. A project supports tasks such as asset searching and the acquisition of assets for the use of your project or assets produced within its scope. The work context associated with a project can include:

- a designation of the assets and reference models that are available to project participants
- established default search criteria for project asset searches
- a designated default asset tree organization for project participants

---

Project Context Definition

To designate its working context, a Usage Controller or Project Manager performs the following actions for each project:

- Associates the project with a profile. The profile identifies reference models available to the project, the classifier values used as default settings for asset searches and as a filter for the asset tree and the classifier types used for asset tree organization (Optional).
- Designates one or more Project Managers. Project Managers may be responsible for managing project participants. They also have the ability to revoke the registration of an asset to their project.
- Assigns one or more users to a project. Project users can search for assets within the context of their project, research those assets, and request that an asset be acquired for the project.
- Associate one or more asset views with a project. Asset views are optional for a project. If a project is associated with one or more asset views, all of the assets reference by the project's asset views are available to the project. If a project is not associated with any asset views, all assets in the library are available to the project.

Your Personal Project

When your user account was created in the library, a corresponding personal project called your "workspace" was created. You are the only user assigned to your workspace.

Your workspace enables you to have access to library assets for searching and viewing whether or not you are assigned to any other project. Any searches you save for this project are yours alone, and are not available to other library users.

Active Project

In addition to your workspace, you may also be assigned one or more projects that are shared with other users. However, your application recognizes only one of your projects at a time as your current *Active* project. The asset searching and acquisition work you perform is performed for the benefit of your *Active* project. For example, if you request and receive approval to acquire an asset the asset becomes registered to your active project.

Switching to a different active project during your work session will change your working context, based on library configuration. For example, you may have different assets and reference models available to you and your asset tree may be organized differently depending on which project is active.

When you login to your application, the initial active project is determined by the project you have designated as your default project. You can change the active project to a different one by clicking on the **[Change]** link in the Consumption section of your left navigation bar and selecting a different project from the list.

Default Project

If you are assigned to multiple projects, you have the opportunity to select one of these projects as your default project. By selecting a default project, you are designating which Project will be your active project when you log in to the library. The default project you choose will remain your active project until you select a different project during your work session.

You can change your default project at any time by clicking on the Active Project **[Change]** link in the Consumption section of your left navigation bar and selecting a different project from the list. Alternatively, you can click on the name link of a currently active project to display its detail page where you can set the project as your default.

View/Edit Project Detail

This page displays detailed information for your active project. When a project is designated as your active project, you can display its detail page by clicking on the project name in the consumption section of your left navigation bar. You can display the Project Details page for another project you are assigned by making it your active project, then clicking on the project name link in the consumption section. If you are a Usage Controller for the project, your view of the Project Details page allows you to change project information. See Project Detail page - Usage Controller for more information.

From this page you can:

- View information about this project, including its name, description, date created, last modified date, whether it's currently designated as your default project and whether it's your private project.
- Access a link to View information on Project Metrics, related to assets owned by this project and assets acquired by this project (if supported by the configuration of your installation).
- Select your default Asset Details view for this project (if your library is configured to offer role-based asset views).
- Set this project as your default, which will cause this to be your active project each time you login to the application.
- View a list of assets attached to the project and display corresponding asset information and request status.
- Display the asset acquisition request detail page for assets attached to the project that are pending approval.
- Display the asset acquisition request context page for assets registered to the project, if your library is configured for context-enabled relationships.
- View a list of the participants assigned to the project.
- If you are a project manager, you may be able to manage the participation of users for this project depending on your library's configuration.

Project Details page Contents

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

[Show Metrics]

Click on this link to display metric information for this project, including assets owned by this project and assets reused by this project. Note: this link is only available if your library is configured to display project metrics.

General

The project name is shown at the top of this page, after the heading **Project Detail**.

This section displays the following:

Description

This is a description of the group.

Default Project

This indicates whether this project is designated as your default project. If it is your current project but not your default project, you will also see the link **[Set as default]**, which enables you to choose this project as your new default project.

Default Asset Details View

If your library is configured to include different views of asset information based on your role assignments and you are assigned a role for this project that has an associated view, you can designate the view to be provided by default. Your choices include the "Default" view provided by your library for displaying asset information not associated with a particular role, a view associated with the one or more roles you are assigned for this project that are associated with an asset view, or a "Show All" view that provides an aggregated view of all information included in these. Regardless of what you select as your Default Asset Details View, you are provided a means to switch between these views on the asset information pages you display with this active project.

Private Project

This indicates whether this project is your private workspace. By default, your Private Project is named "workspace." Any searches you create while your private workspace is active are not visible to others. Typically, you should not acquire assets when your Private Project is active.

Created Date

This is the date and time the project was created.

Last Modified

This is the date and time the project was last saved.

Attached Assets

This is a list of the assets that have been requested for acquisition for this project along with their description. An asset is attached to a project when a project participant requests its acquisition by clicking on the **[Acquire]** link available on its information page. The approval status of the asset request is displayed as well. Assets that are attached to a project may or may not receive the necessary authorization to be registered to the project.

The following information is displayed for each attached asset:

Name(Version)

This is the name and version of the asset. You can click on the asset name/version link to display its information.

Description

This is a text description corresponding to the attached asset.

Acquisition Status

This is the approval status of the request to acquire an asset by a participant of this project. Status is shown for an asset request that is active within the applicable approval process. A *Pending Approval* status provides an active link to the corresponding Asset Acquisition Request popup. Once the acquisition request receives approval or is rejected, the asset is shown as registered to the project in the Acquisition Status column (if the asset acquisition request is approved) or the asset attachment is removed from the project (if the acquisition request is rejected).

Registered Indicates whether an asset is currently registered to the project. If registered, a **[Details]** link is provided to access the context page of the asset acquisition.

See About Asset Acquisition for more information.

Revocation Status

This is the approval status of the request to revoke an asset registration that is currently in place for the project. Revocation status is shown for an asset revocation request that is active within the applicable approval process. A *Pending Approval* status provides an active link to the corresponding Asset Revocation Request page. Once the revocation request receives approval or is rejected, the request is no longer active and is no longer listed. Instead, the asset attachment either is removed from the project (if revocation is approved) or the Revocation Status is removed and the asset remains registered.

See About Asset Revocation for more information.

Properties

This section displays information about the properties associated with the project. Project properties provide information about the project in addition to the information included in other sections of this page. Typically, project property values are applied through automation activities. Project properties are configured specifically for your library and property types displayed may differ by project. The property types included with your project are defined in the library configuration. See your Library Administrator for more information about the project properties defined for your library.

Participants

The information displayed in this section depends on whether you are a Project Manager with responsibility to manage the participants of your project. If you are not a Project Manager for this project, this section includes a list of users assigned to participate on this project. If you click on a user name link, a page enabling you to send them an email is provided.

If you are a Project Manager for this project, the participants section enables you to manage project participants and their roles. Please see Project Participant Management for more information.

If your library is configured to use LDAP groups for mapping group membership and roles, project participation is assigned in the LDAP configuration, and cannot be added to or changed on this page.

Participant and Role Assigment

Participant management for a project is available on the project detail page of a participant who is designated to be a manager for the project. The project detail page is displayed by clicking on the **Project Name** link of your active project on your home page. If you are a Project Manager, the participant section enables management of the users assigned to the project. If you are not a project manager, the participant section simply lists the user accounts of the people assigned to participate on the project. See Participant Project Detail page and About Participant Management for more information.

In addition to the manager of a project, any user who is assigned the role of Usage Controller for the project is also able to assign projects and roles to a user account. However, these tasks are performed by a Usage Controller from their group/ project detail page or a user detail page. The use of the user/participant table and its sort/filter capabilities (as described below) is similar for both Usage Controllers and Project Managers. However, the remainder of this discussion is specifically related to the performance of participant management by a Project Manager from their project detail page.

The Participant Management section of the project detail page provides:

- A displayed list of the first hundred participants assigned to the project (according to the sort and filter that is currently in effect).
- For each participant shown, the information displayed includes their role assignments, account name, full name and email address. In addition, depending on the configuration of your installation, other attributes of the user may be included and roles customized to your library may be available. Please see your System Administrator for information about configuring user attributes with system commands and using Library Configuration for asset production governance.
- The capability to apply a filter in order to limit the participants displayed.
- The capability to sort the displayed participants
- The capability to make changes to the roles of the displayed participants. Note: you must click on **Save** or **[Save Participant Changes]** in order to keep changes you make to participant roles.
- The capability to remove a participant from the project. Note: you must click on **Save** or **[Save Participant Changes]** in order to keep changes you make to participants included on the project.
- A link to the Add Participants page, enabling you to add new participants to the project. Note: Saving a newly added participant takes place on the Add Participants page.

Participant Management page Content

The Participants section of the project detail page contains the following selections and information:

[Save Participant Changes]

Click on this link to save any participant role changes or the removal of any users from the project.

[Add Participants]

Click on this link to display the Add Participants page, enabling you to add users as participants on the project.

Participant

Note: there is a message directly below the section heading of Participants that describes what is being displayed. In many cases there are more participants than can be displayed on this page at once; therefore this message clarifies how many are displayed of the total and what the total number of participants is. If a participant you are looking for is not currently displayed, you can change the filter and sort of the display in order to show the participant you are interested in. See **Filtering** and **Sorting** below in this document.

The Participant column includes a check box corresponding to each displayed participant. All participants are checked. If you wish to remove the project assignment from a user, you can click on the check box to remove the check mark. When you save your changes, any user that was unchecked will no longer be a participant on the project.

Roles

This column displays information about additional roles (in addition to asset user) each user holds for this project.

Role-specific asset presentation

If your library is configured to use role-specific asset information presentation, the Group Roles assigned to a user may affect the user's asset information displayed when this project is active. In this case, the user will be offered a set of asset detail information views that correspond to the role(s) they are assigned for their active project and all the groups above it in your library's group hierarchy. Please see Roles for more information.

Roles available for assignment by a Project Manager include:

Project Manager

This check box depicts whether or not each displayed participant holds the Project Manager role for the project. If you wish to add or remove this role for a user, check or uncheck the check box in this column. When you save your changes, the roles for the corresponding participant will be updated. Note that the Project Manager role assignment will apply to this project only. See Roles for more information.

Asset Capture Engineer (ACE)

This check box depicts whether or not each displayed participant holds the Asset Capture Engineer (ACE) role for the project. If you wish to add or remove this role for a user, check or uncheck the check box in this column. When you save your changes, the roles for the corresponding participant will be updated. Note that the Asset Capture Engineer role assignment will apply to this project only. See Roles for more information.

Publisher

This check box depicts whether or not each displayed participant holds the Publisher role for the project. If you wish to add or remove this role for a user, check or uncheck the check box in this column. When you save your changes, the roles for the corresponding participant will be updated. Note that the Publisher role assignment will apply to this project only. See Library Roles for more information.

Asset Owner

This check box depicts whether or not each displayed participant holds the Asset Owner role for the project. If you wish to add or remove this role for a user, check or uncheck the check box in this column. When you save your changes, the roles for the corresponding participant will be updated. Note that the Asset Owner role assignment will apply to this project only. See Library Roles for more information.

Custom Roles

Depending on your library configuration, you may see roles available to those listed above. See your Library Administrator for more information about your library's process configuration.

Full Name

This is the participant's full name (first and last names) from your library's authentication system.

Email

This is email address of the participant from your library's authentication system.

Custom User Attributes

Your participant table may display additional columns of user information, depending the configuration of your installation.

Filtering

There is a row beneath the participant column headings that offers filter widgets in the first column and a check box (roles) or text box (participant attributes)for each participant attribute following. A filter is used to limit or modify which participants are displayed for the project. For example, by clicking to insert a check in the check box corresponding to the Asset Capture Engineer role and clicking on **Run** you can apply a filter to only show those participants that hold an Asset Capture Engineer role for your project. As an example of using the text box to filter, you can enter *Bruce Johnson* in the Full Name column in order to filter out all other participants and display only Bruce Johnson. Alternatively, you can wild card your character string. An entry of *Johnson* would return all participants whose Full Name includes Johnson. An entry of Bru* would return all participants whose first name begins with Bru.

Run

Click on this button to apply the filter you have designated in the check boxes/text boxes of each column.

Clear

Click on this button to clear all the check boxes and text boxes. Note: to clear an applied filter, you can choose **Clear**, then **Run**.

Buttons

When you are finished viewing and/or modifying the Project page, you can choose the following:

Save

Click on this button to save any changes you have made to add or remove users from the project and/or to the roles of participants.

Sorting

Primary Sort, ascending or descending

If you wish to sort the participant rows by a column value, simply click on the column name. An ascending sort is applied (by default). You can switch the sort order to descending by clicking on the column name again. The triangle icon depicts whether the sort order is ascending or descending. Note: only the primary sort key is noted as ascending or descending.

Additional levels of sorting

If you click on one column name only, the result is a primary sort. If you wish to add a secondary sort, click on the secondary column name first, then click on the primary sort column name. Tertiary sorting is accomplished in a similar way: click on the tertiary column first, the secondary sort column second, and the primary sort column third. Only the primary sort column has the choice of ascending or descending sort order.

Add New Participant

If you are a Project Manager, you can add a library user as a participant on your project. Display the *Add Participants to Project* page by clicking on the **[Add Participants]** link from the Participants section of your project detail page.

In addition to the manager of a project, any user who is assigned the role of Usage Controller for the project is also able to assign users to participate in the project. However, these tasks are performed by a Usage Controller from the project detail page they access from, for example, their group list page. The remainder of this discussion related to the addition of new participants to a project by a project manager will be done from their project detail page.

Specifically, this page provides:

- A displayed list of the first several library users (according to the sort that is in effect on this information).
- For each user shown, the information displayed includes an indication of whether they are currently assigned to this project, their role assignments (corresponding to this project), email address and full name. In addition, depending on the configuration of your installation, other attributes of the user may be included. Please see your System Administration guide for information on configuring user attributes with system commands.
- The capability to apply a filter in order to limit the users displayed.
- The capability to sort the displayed users.
- The capability to make changes to the roles of the displayed users. Note: you must click on **Save** or **[Save User Changes]** in order to keep changes you make to project participants.
- The capability to remove a participant from the project. Note: you must click on **Save** or **[Save User Changes]** in order to keep changes you make to participants included on the project.
- A link to the Create Users page, enabling you to add new library users (according to your library's user authentication configuration).

Add Participants to Project page Content

The *Add Participants to Project* page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Project

Click on this bread crumb link to display your project detail page.

[Save User Changes]

Click on this link to save any changes you have made to add or remove users from the project and/or to the roles of participants.

[Create Users]

Click on this link to display the Create Users page, enabling you to add new library users as needed to make them available to participate on your project. Simply type in a full or partial (wild carded) search string and click on **Run** in order to display authenticated users available to add to your library. Note: you can add any new user that has authentic credentials as determined by your user authentication configuration.

Click on **[Create Selected Users]** after you have checked the User box corresponding to any new user you wish to add. Note that this creates a library user account for the users you've designated. They are not yet assigned to your project until you do so on the *Add Participants to Project* page.

When you return to the *Add Participants to Project* page after creating a new user, the Participants displayed are filtered to the user(s) you just added to your Library. You can now click on the check box associated with each user you'd like to add as a participant to your project. Any roles you've designated will be assigned to the user for the project as well.

You can click on the **Run** Filter button to clear the filter used on the Create Users page if desired.

[Cancel]

Click on this link to return Project Details page without saving changes made to the Add Participants to Project page.

Participant

Note: there is a message directly above the column heading of Participant that describes what is being displayed. In many cases there are more potential participants than can be displayed on this page at once; therefore this message clarifies how many are displayed of the total and what the total of potential participants is. If a user account you are looking for is not currently displayed, you can change the filter and sort of the display in order to show the participant you are interested in. See **[Create Selected Users]** above for information on how to add a participant that is not currently a library user.

Click on the participant check box corresponding to a user you wish to add to or remove from the project. You can also add or remove roles for a user designated as a participant. Note that if you click on a role check box for a user, this results in the participant check box becoming checked as well if it wasn't already. Note that these changes are only saved if you click on the **[Save User Changes]** link (see above).

Roles

This column displays information about additional roles (in addition to asset user) each user holds for this project.

Project Manager

If you wish to add or remove this role for a user, you can simple check or uncheck the check box in this column. When you save your changes, the roles for the corresponding participant will be recorded for the user account. Note that the Project Manager role assignment will apply to this project only. See Roles for more information.

Asset Capture Engineer

If you wish to add or remove this role for a user, you can simple check or uncheck the check box in this column. When you save your changes, the roles for the corresponding participant will be recorded for the user account. Note that the Asset Capture Engineer role assignment will apply to this project only. See Roles for more information.

Publisher

If you wish to add or remove this role for a user, you can simple check or uncheck the check box in this column. When you save your changes, the roles for the corresponding participant will be recorded for the user account. Note that the Publisher role assignment will apply to this project only. See Roles for more information.

Asset Owner

If you wish to add or remove this role for a user, you can simple check or uncheck the check box in this column. When you save your changes, the roles for the corresponding participant will be recorded for the user account. Note that the Asset Owner role assignment will apply to this project only. See Roles for more information.

Custom Roles

Depending on your library configuration, you may see other roles available in addition to those listed above. See your Library Administrator for more information about your library's process configuration.

Note: a Project Manager cannot assign the Usage Controller role to a project participant. The Usage Controller role can only be assigned by another Usage Controller, for example by accessing the project from the Group List page.

Full Name

This is full name (first and last names) of the user (potential participant).

Email

This is email address of the user (potential participant).

Custom User Attributes

Your participant table may display additional columns of user information, depending the configuration of your installation.

Filtering

There is a row beneath the user column headings that offers filter widgets in the Email and Full Name user attribute columns. A filter is used to limit or modify which users are displayed as participating on the project or available to participate in the project. For example, by entering a search string of **John** and clicking on **Run**, you can apply a filter to only show those users who have the characters *John* as part of their full name.

Run

Click on this button to apply the filter you have designated in the check boxes/text boxes of each column.

Clear

Click on this button to clear all the check boxes and text boxes. Note: to clear an applied filter, you can choose **Clear**, then **Run**.

Buttons

When you are finished viewing and/or modifying the Add Participants to Project page, you can choose one of the following:

Save

Click on this button to save any changes you have made to add or remove users from the project and/or to the roles of participants.

Cancel

Click on this button to return Project Details page without saving changes made to the Add Participants to Project page.

Sorting

Primary Sort, ascending or descending

If you wish to sort the participant rows by a column value, simply click on the column name. An ascending sort is applied (by default). You can switch the sort order to descending by clicking on the column name again. The triangle icon depicts whether the sort order is ascending or descending. Note: only the primary sort key is noted as ascending or descending.

Additional levels of sorting

If you click on one column name only, the result is a primary sort. If you wish to add a secondary sort, click on the secondary column name first, then click on the primary sort column name.

Project Reports

As a Project Manager, you can create report entries to make reports available to all participants on your project.

To create a report entry that will be available to all participants on your project, go to the **[Manage Reports]** page. You can display the Manage Reports page by clicking on the **[Manage Reports]** link in the Reports section on your home page. The manage reports page also enables you to edit or remove a report entry for your project.

In the Project Reports section, click on the **[Add Report]** link corresponding to the project you wish to add a report entry to. By completing the information on the Adding a new Report page and clicking on **Save**, a report entry will be creating that will be available to all project participants including yourself. See Adding a new Report for more information.

Create and Work With Assets - Asset Capture Engineer

An asset is a set of information about an item of importance to your development organization. Assets, also known as Software Development Assets, are published to your library in order to make their information readily available to Asset Users and to facilitate their reuse. You can collaborate with others in finding, researching, and discussing library assets.

Assets are initially created in your library's asset source by an Asset Capture Engineer. Assets are created as "Assets in Progress" in the library asset source. An Asset Capture Engineer proceeds to capture information for the new asset until it is considered complete for its current lifecycle state. At this point, the Asset Capture Engineer submits the asset for publish to the library. If the request to publish the asset is approved (if required), the asset is published and becomes available to Asset Users.

In addition to assets originating from your library's asset source, your library may also include assets brought in from asset sources in external libraries or imported from other external sources. From an Asset User's perspective, assets from external sources are similar in every way to assets originating from your library's asset source. See Assets from another Library for more information.

Asset Information

The individual elements of asset information available for inclusion with an asset are designated by your library's Global Definition Template and its Library Configuration document. Your library has a number of different types of assets defined, each of which are comprised of elements that correspond to the asset's type and to its lifecycle stage, if applicable. In addition, your library may be configured to vary which information elements are presented for an asset based on the role assignments of the user viewing its information. Asset information elements belong to one of general types defined below:

1. **Asset Context -** These elements enable you to record various facts and descriptions useful in identifying and describing the asset. These include asset name, version, description and asset overview.

2. **Asset Classifiers -** These elements enable you to record various facts about your asset. In turn, the classifier values recorded for an asset are searchable by Asset Users. Asset Classifiers are controlled by the asset's capture template.

3. **Asset Artifacts** - These elements represent information pertinent to the asset in the form of files or references to files or web pages. When an asset is captured, there is an option with each artifact to either load a file into the library, to include a reference (in the form of a URL or other defined protocol) or to enter a text description to be associated with the artifact type. Artifacts that are not of the text description form are available to download from the asset's information pages or to import into your development environment if you are using a rich client application. Asset Artifacts are controlled by the asset's asset capture template.

4. **Asset Relationships** - These elements enable you to record relationships an asset has with other assets. Relationships you record for your asset are displayed with the asset information in the library, providing links for navigation to the related asset's information. Asset Relationships are controlled by the asset's asset capture template.

Asset Creation and Update Applications and Tools

Capturing an asset is a task performed by users with the Asset Capture Engineer role. If you are an Asset Capture Engineer, you are guided and constrained by the asset's capture template as you enter asset information. Your ability to create and modify individual assets and metadata elements may be determined by the roles you are assigned. Furthermore, your roles in the library may only allow you to edit and delete the asset while it remains in certain lifecycle stages. Once you complete the asset capture and submit the asset for publish, the asset may be reviewed and approved or rejected according to the process established for its governance.

Assets can be created and updated through various Akana™ applications and tools, such as:

- Akana® web browser application (thin client)
- Rich client add-ins or plug-ins, such as:

- Akana® Plug-in for Eclipse
- Akana Plug-in for IBM® Rational® Application Developer for WebSphere Software
- Akana Plug-in for IBM Rational Software Architect
- Akana Add-in for Microsoft® Visual Studio add-in
- Akana Repository Client application (no Integrated Development Environment required)

* Akana Automation Extensions
* Akana AnySource Asset Adapter tool kit
* Akana SOAP Application Programming Interfaces (APIs)

Asset Publish Information

In addition to the metadata of an asset, each asset also includes information provided to it at the time of publish. This information is called publish information and may be unique for the asset in each library it is published to. See Assets from another Library for more information on assets published to multiple libraries. Publish information may include such things as:

* the owning group of the asset
* topics established for the asset's forum
* private artifact designations for the asset

Asset publish information is often established automatically at the time the asset is published according to the specifications of the publish template used. Asset publish information can be manually updated by a user assigned the Publisher role for the asset. Alternatively, asset publish information can be updated automatically through use of Akana SOAP Application Programming Interfaces.

Asset Discussion Forum

Each asset in your library has a corresponding discussion forum which is specific to this asset. The forum is accessible from the asset's information page by clicking on the **Discuss** link\icon.

If you are a Library Administrator or are assigned the Publisher or Asset Owner role for a particular asset, you have the ability to remove any asset-specific discussion threads or replies from its discussion forum. Removing an asset-specific discussion thread removes the topic and all related replies. You can also remove an individual forum reply. To delete a reply or a discussion thread, click on the corresponding **[Delete]** link. Confirm your request to remove the item when prompted.

Asset Forum Topics

As with other asset publish information, forum topics can be defined specifically for individual assets or created for sets of assets that use a common publish template for their initial publish. Example asset forum topics may include:

* Usage Questions
* Feedback
* New Requirements
* FAQ's
* Publication Notes

Create Asset

Assets in your library are developed through a process called asset capture. Asset capture is the process of entering information about the asset and creating references to information from sources outside the asset. Together this information comprises and defines the asset. Once the asset capture process is complete, the asset can be submitted for publication into the library, which makes the asset available to others for reuse. Until an asset is published, it is only visible to those who have the ability to create and update the asset in progress. After the asset is published, any updates made to the asset remain visible only to those who have access to the asset in progress until it published.

Upon their creation, assets are placed in your library's asset source. Library users who have the role of Asset Capture Engineer have the ability to create and work with assets in the library asset source. Asset Capture Engineers access assets in the asset source through use of their assets in progress lists, which include the assets from the asset source for which the Asset Capture Engineer is responsible. If you are an Asset Capture Engineer, the group(s) for which you are assigned the Asset Capture Engineer role determines the assets available to you as assets in progress. You have the responsibility to create and maintain the assets owned by your Asset Capture Engineer groups and any groups subordinate to it. Your assets in progress pages are your view of of these assets in your library's asset source. Your assets in progress lists offer you accessibility to the assets you have the responsibility to maintain.

If you are an Asset Capture Engineer, you can create and maintain assets in your asset source using any of the following:

- Web browser application
- Automation using Automation Extensions, the AnySource Asset Adapter Toolkit, or the SOAP APIs
- IDE Integrated tool/rich client plug-ins and add-ins. For example the Akana® Plug-in for Eclipse, Akana Plug-in for IBM® Rational® Application Developer for WebSphere® Software, Akana Plug-in for IBM Rational Software Architect, Akana Add-in for Microsoft® Visual Studio® and many more. See the Download Center (available from your top navigation bar) for more information.
- Akana Repository Client, an Eclipse-based client application that does not require the installation of an IDE.

Working with Assets in Progress

Once an asset is created as an asset in progress in the asset source, information can continue to be added to it through use of any of the Akana Applications. While you are working on an asset, it is locked for your use. However, you can choose to unlock the asset which releases it for editing by other Asset Capture Engineers. Assets can be edited by any Asset Capture Engineer that has access to the asset in progress.

At any time in this process, if you (or another responsible Asset Capture Engineer) determine the asset to be ready to be made available to asset searches, you can submit the asset for publish. This action triggers a process configured for this type of asset for your library in order to govern the content of the asset. The next step of this process, following the submission of the asset by the Asset Capture Engineer, will either be the publish of the asset or a notification to users assigned a role corresponding to the next step of the defined process. See About Published Assets for more information on the publish process.

Asset Definition

Asset definition involves designating the types of assets that can be stored in your library and defining for each type the corresponding metadata elements, the constraints applicable to metadata values. For asset types that represent various stages of a development lifecycle, metadata elements are defined separately for each corresponding lifecycle stage. See Asset Information for more information about asset metadata.

Your library's asset definition is typically designed and maintained by a Library Administrator through use of the Configuration Designer tool. New asset capture templates are added in order to map asset metadata to the corresponding asset type(s). This mapping is accomplished by a Library Administrator using the "Asset Types" tab in the Library Configuration editor.

Asset Types

Asset types can be added to or removed from your library by entering values for the value list corresponding to the "asset-type" classifier in the Global Definition Template. Each value in the list is the name of a type of asset. Each asset type included in the value list will correspond to one or more asset capture templates which designate the metadata and constraints applicable to the asset type.

Asset Metadata

Asset metadata is defined for your library through combined use of the Global Definition Template and asset capture templates. See the Reference section of the web browser application's on-line help for more information on these two types of library configuration documents.

- Global Definition Template - This template designates your library's asset types for your library as described above. In addition, the Global Definition Template defines all asset elements available for use with all types of assets. It also designates various attributes applicable to the metadata elements included.
- Asset Capture Templates - Each asset capture template identifies the specific metadata elements the asset type will need to use from the Global Definition Template. In some cases there are multiple capture templates for an asset type, such as when the asset type has several lifecycle stages. Each asset capture template must conform to any constraints imposed by the Global Definition Template for elements it uses. Capture templates may also further constrain the rules put in place by the Global Definition Template as necessary.

Choosing an Asset Capture Template

The first step in creating an asset that will be included in the library, is designating the asset name, version, asset type and a corresponding capture template that will define and accompany the new asset for creation and update validation. These templates are called asset capture or asset constraint templates. The template to be associated with an asset is chosen when the asset is created; however, the template associated with the asset can be switched to another as necessary. An asset is always associated with a single asset capture template. The template provides a framework for the asset's definition, such as designating the kinds of classifiers, artifacts, and relationships that are available to be included for the asset and which, if any, are required.

Asset capture templates are uploaded to your library and associated with the asset types defined for your library by a Library Administrator. Each type of asset must have at least one capture template associated in order to enable the capture of an asset of that type. In some cases, an asset type is associated with more than one capture template when asset constraints vary by asset lifecycle stage or by variations of assets of a certain type.

Asset capture templates are used to enforce validation during asset creation and publish. The capture template designates which of the asset elements included in your library's Global Definition Template must be included in the asset as well as any other cardinality constraints designated. In addition, it can provide value lists and default values for elements to facilitate the entry of asset information. Capture templates also facilitate asset creation and update by customizing the elements available for the type of asset you are working with, ensuring that the newly created or updated asset conforms to the information expected.

See your Library Administrator for more information about the asset capture templates used in your library.

Asset Owning Group

The assignment of an owning group to an asset provides a means to organize the work related to the asset and to assign responsibility for that work to the appropriate users. Providing an owning Group establishes the asset in the group hierarchy of your library, which designates the users who will include the asset in their scope of responsibility when carrying out tasks related to asset ownership. If you are a Usage Controller, the hierarchical nature of owning groups and the corresponding inheritance chain provides you with an effective and flexible way to establish work environments for the tasks of asset capture, update and publish.

For example, an asset's owning group determines the publish template used when the asset is published or republished and also establishes the users that will be responsible for maintaining the asset in progress in the library asset source, approving the asset for publish or deletion and making decisions on requests to use the asset in a project.

Default Owning Group

When an asset is created by an Asset Capture Engineer, an owning group for the asset must be specified. A default owning group may be provided, based on the owning group assigned to the last asset you created or edited. If you have not previously created or edited an asset, the default owning group is set to "none" and you will need to select an owning group from the list of groups provided. The owning group of an asset can be changed to another group at any time through asset edit.

What is determined by an Asset's Owning Group Assignment

Each of the following are library processes use the asset's owning group to determine user responsibility:

- When an asset is updated, the Asset Capture Engineers that have the asset in progress available to them are determined by the users assigned Asset Capture Engineer responsibility for the asset's owning group.
- When the asset is submitted for publish, the type of publish and its publish information is determined by the publish template in place for the asset's owning group (or the owning group's inheritance chain).
- If your library is configured to use a customized asset production governance process, there may be additional user roles and corresponding approvals necessary in your process for asset publish approval. In this case, the owning group of an asset submitted for publish will determine the users involved in the process based on the scope of their responsibilities.
- If your library is configured to use a customized asset consumption governance process, there will be user roles and corresponding approvals necessary in your process for asset acquisition approval. In this case, the owning group of an asset requested for acquisition will determine the users involved in the acquisition approval process from the asset ownership perspective.

Changing an Asset's Owning Group

If you are an Asset Capture Engineer, you can easily change the group designated as owning an asset either at the time of asset creation or by editing the asset after creation. See change owning group for more information.

Create New Asset

The Create Asset dialog is displayed when you select **Create Asset** from the left navigation bar of your application. It provides the means to create a new asset in progress and takes you to the main asset edit page once the new asset is created in order to add additional asset metadata. This dialog first requires you to specify the type of asset you are creating and choose the asset's capture template. The asset capture template chosen will determine the classifiers, artifacts, and relationships that can be defined for the asset as well as other metadata constraints. You are also required to enter the asset's name and version and identify its owning group.

If you are an Asset Capture Engineer, you can display this dialog by clicking on the **Create Asset** item included in your left navigation bar.

From this page you can:

- Select the type of asset you are creating.
- Select the capture template used for asset validation.
- Designate the asset's name and version information.
- Enter a Description of the asset.
- Enter an Overview of the asset.
- Select an owning group for the asset.
- Select a project context for the asset, if your library is configured to support asset-based acquisition.

This dialog contains the following selections and information:

Asset type

Select the type of the asset you are creating. The asset types available are those defined in your library's Global Definition template. Note that the ability to create certain asset types may be restricted for certain roles in your library.

Capture Template

Select the capture template to be associated with the asset. Each asset type is associated with at least one capture template. The set of capture templates available are those that are associated with the asset type you designated and may also be limited to the templates appropriate for the lifecycle stage of the asset.

The capture template you choose determines the classifiers, artifacts, and relationships that are available for use in defining the asset. It provides asset metadata constraints that will be used in validation of the capture and update of asset information. In addition, the template associated with your asset can provide assistance in the entry of asset information, such as default values, value lists, help text etc. See your Library Administrator for more information about the asset capture templates used in your library.

Name

Enter a name for the asset you are creating. The maximum length of an asset name is 320 characters.

Version

Enter the version of the asset you are creating. each asset is assigned a unique ID associated with the asset in your asset source. The maximum length of an asset version is 40 characters.

It is useful to have the asset name and asset version combination be unique for each asset in your library. However, this is not required unless your library is configured to provide name/version uniqueness through synchronous validation. The version you enter may also be subject to synchronous asset validation, based on your library configuration. See your Library Administrator for more information about your library's use of synchronous asset validation.

Description

Enter a description of your asset. The description is used to provide brief information about the asset for display throughout the applications. The maximum length of an asset description is 480 characters.

Overview

Enter an overview of the asset. The overview allows you to enter asset information in more detail. The overview entered becomes an artifact of the asset; however, the overview artifact is unique in that it has a prominent display on asset information pages.

Owning Group

Each new asset requires the designation of an owning group. The owning group for an asset is used to determine the users responsible for the asset, such as:

- maintaining its metadata
- performing governance on processes related to asset publish, asset deletion, use of the asset for a project or another asset, or the revocation of an asset registration.

In addition, the owning group for an asset determines the publish template used upon asset publish or republish.

Each asset created is given a default owning group based on the owning group assigned to the last asset you created. However, if this is the first time you've created any asset, the owning group defaults to "none" and you must choose an owning group. The left navigation bar displays your current "active group" in the production section of your left navigation bar. You can change an asset's owning group either by changing the active production group in your left navigation bar prior to creating it or by clicking on the **[Change]** link provided for owning group on the Create an Asset page during asset creation.

You are able to select an owning group of your choice to replace the default owning group as necessary. The groups provided on the Change Group Owner page include those groups for which you are assigned as Asset Capture Engineer responsibility. See About an Asset's Owning Group for more information.

Project Context

If your library is configured to use asset-based acquisition, assets created that will be able to acquire other assets must be associated with the project representing the development effort. Assets that will not be used to acquire other assets should designate their project context as "None." If your library supports only asset acquisition by project, a project context is not identified for any assets.

When project context is to be identified for an asset:

- A default project name is provided, based on the last project context value you selected when creating or editing an asset. If this is the first asset you've created with a project context, the default value is set to "None."
- You are able to select a different project to replace the default project context as necessary. Click on **[Change]** to select a different project from the list of projects you are assigned as a participant.

Create

Click on this button to create an asset in your library's asset source (as an asset in progress) with the information you have entered. This action displays the Edit Asset page for further entry of asset information. The asset also becomes available to you as an asset in progress, and is locked by you.

Cancel

Click on this button to display your Assets in Progress page, without creating the new asset or saving any of its information.

Import Asset

Assets in your library may be imported from an external registry. You have the option of importing assets from a UDDI, WSDL, Schema or a variety of other sources into your library's asset source as assets in progress. For example, if you are an Asset Capture engineer and your organization is using a UDDI Registry, you can import an asset into your asset source if your library has been configured to do so. Upon import, this asset can be immediately submitted for publish to your library, or the asset can remain as an unpublished asset in progress, available for editing andfor eventual submission for publish.

Importing Assets

The following statements relate to importing assets into your library:

- To support the ability to import assets into your library from a registry, your library must be configured to identify the registries available to your library. Please see your Library Administrator for more information.
- You must have the Asset Capture Engineer role for a library configured to enable the import of assets in order to perform the import into that library.
- At the time you import an asset into your library, you can choose to bring it only into your asset source (without submitting it for publish) or to submit the asset for publish upon import. In either case, the new asset will exist as an asset in progress in your asset source once imported.
- You can choose to import one or more assets at a time.
- The asset or assets imported are displayed on a result list once the import has been performed.
- Once an asset is imported into your asset source, it can be edited through use of any of your applications.
- At such time that you (or another responsible Asset Capture Engineer) determine the asset to be ready to be made available to asset searches, you can submit the asset for publish. This action triggers the submission governance process configured for this type of asset for your library. If there is an approval process in place for the publish of this asset, notification is sent to users who have approval responsibility. See About Published Assets for more information on the publish process.

Please see Asset Import for information about the asset import page and the import result list.

Asset Import

This page enables you to import one or more assets into your library as assets in progress from a registry available to your library (such as a UDDI registry) or from standard document types (such as schemas, WSDL documents, or delimited files). This page requires you to specify the import source and to identify the asset or assets to be imported. When importing from an external registry, you can use a search string to display assets from the registry that contain the string provided in their name.

If you are an Asset Capture Engineer, you can display this page if there is an importer defined for your library. To do so, click on the Import Assets link shown in your left navigation bar. See your Library Administrator for information about the asset importers available for this application.

Your Library Administrator may have configured your importer to require one or more roles, in addition to Asset Capture Engineer, in order to perform the import. When additional roles are required, you must select an Active Production Group before performing the import. You must hold at least one of the required roles in order to import the assets.

From this page you can:

- Identify the method you want to use for importing assets.
- Select one or more assets to import into your asset source.
- Designate whether or not the assets will be submitted for publish when imported.
- If you are importing from a registry, a Search field is provided that allows you to filter the list of assets available for import. You also have the option to view the asset registry information for external registry assets before performing the import.

Asset Import page Content

This page contains the following selections and information, although some selections will differ based on the type of importer you are using.

Home

Click on this bread crumb link to display your home page.

Import Assets

<Select an Import Source>

Indicate the source of your imported asset(s) by selecting it from the dropdown list. One or more Import sources are configured in your library's Configuration. Please see your Library Administrator for more information.

URL or File

Some importers require you to specify a file that contains a representation of the asset(s) to be imported. Select the radio button corresponding to the file to use for import.

- If you select the **URL** radio button, enter the URL location of the file you want to import.
- If you select the **File** radio button, a Choose File button is displayed. Click the **Choose File** button to select the file you want to import.

Search

When importing from an external registry, you can use the Search box to filter the list of assets available for import to those containing the search string in their name.

Additional Fields

There may be additional fields to fill in depending on the type of importer selected.

Retrieve button

Click the **Retrieve** button to display the list of importable assets in the retrieval results list.

Retrieval Results

The following links and results are displayed after clicking the Retrieve button.

[Import Selected Assets]

Click on this link to create an asset in your library's asset source (as an asset in progress) for each asset designated for import in your Search Results list. This action does not submit the asset(s) for publish.

[Import and Submit Selected Assets]

Click on this link to create an asset in your library's asset source (as an asset in progress) for each asset designated for import in your Search Results list. Taking this action also submits the asset(s) for publish. Assets submitted for publish may trigger a governance process requiring approval prior to asset publish, depending on your library's asset submission governance process.

The following information is displayed for each asset in the list of assets available in the Retrieval Results.

Import check box

Click on the import check box corresponding to an asset in the result list in order to add or remove the designation that you wish to import this asset.

Asset Name (version)

The name and version of an asset eligible to be imported.

Type

The type of an asset that has met the conditions of your search filter.

View URL

When importing assets from an external registry, a URL link is provided which links to the registry asset. Click on this link to display information about this asset from the registry.

Import Results page Content

After selecting and submitting the assets for import, the Import Results page will be displayed. This page shows the results of the import of assets.

Home

Click on this bread crumb link to display your home page.

Import Assets

Click on this bread crumb link to display the Import Assets page.

Asset Name (Version)

This column displays the name and version of the imported asset. If an asset is imported successfully, you can click the name link to view the asset.

Status

The status column displays one of the following statuses along with a mouse-over tool tip.

- **Pending** - This status is displayed while the asset import is in progress.
- **Imported** - This status is displayed if the asset is successfully imported into the asset source.
- **Import Failed** - This status is displayed if the asset import fails.

You can refresh the page to see updated status.

If the asset is imported successfully into the asset source (assets in progress), an [Edit] link will be displayed. Click the **[Edit]** link to edit the asset.

Description

This column displays the description of the imported asset.

Delimited File Export and Impmort

The default library configuration includes a way to export assets from your library using the Delimited File Exporter, and import assets into your library as assets in progress using the Delimited File Importer. This feature is especially useful for working with assets using a spreadsheet such as Microsoft Excel. The Delimited File Exporter and Importer are defined in the Library Configuration Document (LPC). Your Library Administrator can perform further customization by using the information provided in the Library Configuration Guide, which is available from the Akana™ support site. Examples of customizable configuration properties include options such as whether to export published assets only vs assets in progress; whether to export by-value artifacts; and whether to restrict the ability to perform imports and exports to only certain roles within the library. Export properties include options to either replace, update, or add an asset; whether to send an email containing import results; and whether to bypass process governance when updating assets.

Exporting Assets

The Delimited File Exporter is an action you can perform from the Search Results page or the Asset Working Set dialog. Depending on your library configuration and how many actions are defined, this option may appear as either **[Delimited File Exporter]** or as a choosable action when **[Process Assets]** is selected. From the Search Results page or the Asset Working Set dialog, select the assets you want to export, then choose the Delimited File Exporter action.

The selected assets are exported into a zip file. You are asked if you want to open or save the resulting zip file. Save or open the zip file, then unzip the file to save the contents. Note the following zip file structure:

- README.htm includes a summary showing the export results, as well as a detailed description of the delimited file format for the exported assets.
- assets.txt is a delimited text file containing a representation of the exported assets. The assets.txt file follows a specific format and includes a header row containing the names of asset attributes. The header may have repeated asset attributes to allow multiple values to be set on an asset attribute. Following the header row are rows representing the exported assets.
- <folder> each exported asset is identified in assets.txt by its asset-id. A folder is created for each asset, named the same as the asset-id. Within each folder are files that include further information about the asset, which may include the asset overview, the contents of by-value artifacts and relationship properties. These files inside the folder are referenced from the assets.txt file.

Editing the Exported Assets file with Microsoft Excel

Once you have your exported assets unzipped to the file system, you can view and edit the assets.txt file using a spreadsheet. The assets.txt file is encoded as a delimited file stored in UTF-8 encoding. Start Microsoft Excel and select **File > Open** then select your *assets.txt* file, using the file type filter if necessary to locate the file in the Open File dialog. The Text Import Wizard is started. **It is important to use the import wizard in order to properly set Excel column types so certain string values are not converted to numbers or boolean values in the spreadsheet**. Opening the assets.txt file by double-clicking it does not invoke the Text Import Wizard.

The Text Import Wizard will lead you through a series of dialogs that allow you to configure your text file settings. The import wizard should recognize and provide the correct defaults for most of the import settings. The following settings should be manually examined and changed if necessary:

- Set the *file origin* to UTF-8 encoding. Note that Excel may show this option as *65001 Unicode*.
- Set the *column data format* to *Text* for all columns in the data. To select all the data, click on the first column to highlight it, then scroll to the last column and ctrl+click on the last column.

Once the wizard completes, the spreadsheet shows your asset data and you can start making changes. You may find it helpful to change the alignment on the header row, slanting it to a 45 degree angle, in order to view more data at the same time.

Format of the delimited text file

As you change the contents of the delimited file, make sure by-value artifacts and other files are referenced relative to the delimited text file, and reside in the same directory (or subdirectories) that contains your delimited file. For example, if you want to add a by-value artifact called 'MyArtifact' which is for an asset called 'MyAsset,' you could create a folder called 'MyAssetArtifacts,' and add the artifact file to that folder. Then reference the artifact value as MyAssetArtifacts/*artifactfile*^by-value^1.0^MyArtifact (see artifact.*category* in the table below for an explanation of the formatting of an artifact value).

The following table describes the asset attributes you can specify in your delimited text file.

Attribute	Attribute Value
asset.id	Unique asset identifier. The asset identifier is generated by the Akana application when an asset is created. The Delimited File Exporter includes the asset.id for each asset.
asset.name	Name of the asset
asset.version	Version of the asset
asset.template	Asset capture template
asset.description	Description of the asset
owning.group	Name of the asset's owning group
project.context	Name of the asset's project context
overview.text	The asset overview text. This is a convenient way to set the overview rather than having to add an asset attribute called artifact.overview and create a separate file containing the overview text, as is done by the Delimited File Exporter.
classifier.*name* (repeated for each classifier)	Value of the classifier. Compound classifier values are separated by the "|" character, for example: `Shipping|Request`.
artifact.*category* (repeated for each artifact)	Artifact values are described in three or four parts, separated by the "^" character: reference^containment^version and optionally ^name. The artifact containment determines how the artifact is described in the delimited text file: by-value (File) artifacts • *reference* is the path to the artifact file, relative to the assets.txt file. The file may be specified as <filename>.<extension>, *.<extension>, or *.* • *containment* is `by-value` • *version* is the version of the artifact • *name*, if omitted, defaults to the artifact category or, in the case of wildcarding, defaults to the file name (extension included) by-reference (URL) artifacts • *reference* is the URL reference of the artifact • *containment* is `by-reference` • *version* is the version of the artifact • *name*, if omitted, defaults to the artifact category

	by-description (Text) artifacts • *reference* is the text of the artifact • *containment* is `by-description` • *version* is the version of the artifact • *name*, if omitted, defaults to the artifact category If multiple artifacts in a row share the same category, name, and reference, the first occurrence will update the matching artifact in the asset (if found), and the subsequent artifact occurrences will be added as new artifacts. The character used to separate the parts of the artifact (default "^") can be configured by your Library Administrator by setting the *attributeValueDelimiter* property.
relatedasset.*name* (repeated for each relationship)	Relationship values are described in two or three parts, separated by the "^" character: name^version and optionally ^properties. • *name* is name of the related asset • *version* is the version of the related asset • *properties*, if included, describes the relationship properties. The properties can either be specified as a list of properties in the form `propertyname1=propertyvalue1 propertyname1=propertyvalue1 ...etc...`, or as the path to an xml file containing the properties. The properties file is specified relative to the location of the delimited text file. The character used to separate the parts of the relationship (default "^") can be configured by your Library Administrator by setting the *attributeValueDelimiter* property.

Add / Update / Replace behavior

The Delimited File Importer can be used to add new assets to a library, or to modify or replace existing assets. You should have a clear idea of what behavior you want to achieve.

When using an exported assets.txt file, the first column in the file contains an asset.id which identifies an existing asset. Performing an import with an asset.id specified assumes you are working with an existing asset. The existing asset, if found, will be replaced or updated. If an asset with the specified id is not found in the library, an error will result. Your Library Administrator can change this behavior by configuring the Delimited File Importer's *ignore-asset.id* property with a value of "true."

If asset.id is empty or not provided for an asset, or the ignore-asset.id property is set to "true" (see previous item), the importer will inspect the library for the first asset with a matching name, version, and classifier.asset-type. If a matching asset is found, that asset will be replaced or updated. If a matching asset is not found, a new asset will be created in the library. Therefore, if you want to create a new asset, make sure no asset already exists with the same name, version, and classifier.asset-type.

When working with existing assets, you can decide whether existing assets are updated or replaced. The default behavior is configured by your Library Administrator. You can override this default configuration when you perform the import, using the Delimited File Importer's *Replace Assets* setting. When *Replace Assets* is set to "true," existing assets are completely replaced. To instead update existing assets, set *Replace Assets* to "false."

When updating assets, elements in the delimited file that do not already exist in the asset are added. For elements that *do* already exist in the asset:

- Classifiers that match by name and value are not changed. Those that match by name but differ in value are added if adding the classifier would not exceed the number of allowable instances; otherwise the first classifier that matches by name is updated with the value specified in the delimited file.
- Within an artifact category, by-reference and by-description artifacts that match by name and reference value (for example, URL or description text) are updated. Those that match by name but differ in reference value are added if adding the artifact would not exceed the number of allowable instances; otherwise the first artifact that matches by name is updated with the reference value specified in the delimited file.

- Within an artifact category, by-value artifacts that match by name are always updated with the value specified in the delimited file.
- Within each type of relationship, relationships that match by related asset name and version are updated. Otherwise, a new relationship is added.

If an asset is specified in multiple rows of the delimited file, your Library Administrator should configure the Delimited File Importer's *concurrentThread* property to 1. Otherwise, it is possible that the asset updates could occur in a different order than what you intend. Alternatively, arrange your asset information so that the information is contained in a single row per asset.

Saving your changes and preparing for Import

When you have completed making your changes, save your file as a delimited text file. If Excel shows a message indicating the file may contain features that are incompatible with delimited text files, select the option to leave out incompatible features. Note that the character used to delimit your text file must match the character configured in your importer (*attributeDelimiter* property), which defaults to the tab character.

When you are ready to import your assets using the Delimited File Importer, determine if you need to create a zip file or if the delimited text file is sufficient for importing assets:

- If your delimited text file contains **all** the asset information needed, without referencing any other files, then you can directly import the text file. Asset overview text can be defined using the overview.text attribute. Relationship properties can be defined by specifying properties as a list of `name=value` pairs, as described in relatedasset.*name*.
- If you reference any other files (for example, by-value artifact files or properties files), then you must zip up the contents of your delimited text file and the associated files and subdirectories. Be sure the delimited text file is at the root of your zip and any references to by-value artifacts or other files are resolved relative to the delimited text file within the zip file. Additionally, the delimited text file *must* be called `assets.txt`.

Importing Assets

After you have completed making changes to your assets, you can import the assets into a library. Before attempting to perform the import, note the following:

- If you import the assets into a library which is different from the one you exported assets from, be sure the library you are importing into contains the same asset metadata configuration (classifiers, artifacts, etc) as the original library. Recall that in order to create new assets, you must either pass an empty asset.id attribute for the asset, or configure the library's Delimited File Importer with *ignore-asset.id* set to "true." See Add / Update / Replace behavior.
- If you are importing a large number of assets at once, you may want to consider the following:
    - Reducing the logging and/or altering the number of log files
    - Temporarily removing contacts from the publish template
    - Coordinating with your application administrator to disable email from the library

To start the import process, log in to your thin client application as an Asset Capture Engineer. This role is required in order to create and update assets. Your Library Administrator may have configured your importer to require one or more roles, in addition to Asset Capture Engineer, in order to perform the import. When additional roles are required, you must select an Active Production Group before performing the import. You must hold at least one of the required roles in order to import the assets.

Click on the *Production* > *Import Assets* link on the left navigation bar to display the Import Assets page. Select an import source of *Delimited File Importer*. Selecting this option will show the parameters for the importer. You can hover your mouse over the parameters to view hover help.

URL or File - Select the option that describes where your delimited text file or zip file resides.

Import File - Enter the URL location of the file you want to import, or browse to the location in your file system that contains your file.

Require Validation - Indicates whether you require the imported assets to pass asset validation prior to saving them into your library. Enter a value of `true` or `false`.

Submission Note - Submission request note.

Replace Assets - Specifies the update or replace behavior of existing assets. Your library configuration determines whether existing assets targeted for import are replaced or updated by default. You can override the default configuration by setting the value. Setting Replace Assets to `true` will cause existing assets to be completely replaced. Setting the value to `false` will cause existing assets to be updated with the data from your delimited text file.

When you are ready, click the **Retrieve** button. The list of assets found in your delimited text file are shown in the retrieval results list. See Retrieval Results to complete your asset import.

An informational email will be sent once the import request is complete.

Work With an Asset

The Asset Capture Engineer role is assigned to library users who will create assets in your library's asset source. If you are an Asset Capture Engineer, you can add an asset to your library's asset source by creating it as an asset in progress.

As an Asset Capture Engineer, you work with an asset in the following ways:

- Create an Asset
- Edit an existing Asset
- Submit an Asset for publish to the library
- Delete an Asset from the library

Assets in Progress

Your application provides the ability to create and edit assets in what is called the library Asset Source. This ability is limited to users who are assigned the Asset Capture Engineer role and may be further constrained to require additional asset edit roles corresponding to asset types and in some cases by individual asset elements depending on the library configuration. Assets in the Asset Source are called assets in progress to distinguish them from published assets.

The purpose of an asset in progress is to eventually be used in the creation or update of a published asset, which is available to asset users. As an Asset Capture Engineer, you can submit an asset in progress for publish or republish once it meets all constraints imposed by its asset capture template and you determine it ready. Once a submission request receives full approval (if required), the asset is published and the published asset reflects the content established in the asset in progress.

Assets in progress are only available for viewing or editing by users who have the role of Asset Capture Engineer plus any additional roles related to asset type.

Assets in Progress Reside in the Asset Source

Each library has an associated Asset Source which contains assets created by and available to its Asset Capture Engineers. Users are assigned the Asset Capture Engineer role for one or more library groups. Any add-on roles for asset edit are also assigned by library group. As an Asset Capture Engineer, the assets available to you for edit are those owned by the groups for which you have Asset Capture Engineer responsibility and any supplementary edit roles necessary for the lifecycle state of the asset. All users who have like asset creation/edit role assignment are able to view the same set of assets in progress at any time. Any of these users may open an asset for edit that is not currently *locked* by another Asset Capture Engineer.

Working with Assets in Progress

As an Asset Capture Engineer, you can get to your assets in progress by using either the web browser application or one of the rich client applications. Click on the **Assets in Progress** link in the **Production** section of the left navigation bar of the web browser application to display your assets in progress. If you are using a rich client application, open the **Production** folder in your rich client Library Explorer view to display the three sub-folders of your assets in progress. Alternatively, if you want to edit an asset that has been published, you can first search your library to find the published asset using either the web browser or rich client application. Next, click on the edit link or icon to bring up the asset's edit page.

Click **[Edit]** to open the asset in progress for your editing. This action locks the asset in progress so that no one else can open it for edit while you are working on it. This lock remains in place until you remove it by clicking **[Unlock]** or submitting the asset in progress for publish (which automatically removes the lock). While you have an asset in progress locked, other Asset Capture Engineers can view its information by clicking its name link (from an asset in progress list) or by selecting the View option for this asset in progress from a context menu in a rich client application.

Your assets in progress are organized into three groups. Click on an edit link corresponding to the asset you wish to edit from any of these three pages to display its Edit Asset page:

1. Assets you currently have locked (no other Asset Capture Engineers have the ability to open these assets for edit until you or a Usage Controller releases them)
2. Assets you have recently edited
3. All assets in progress which are available to you for edit

Usage Controller Asset Management

Users with the Usage Controller role are provided access to assets in progress for the purpose of managing asset locks. In cases where an asset or set of assets are locked by an individual who is not available to unlock them, a Usage Controller can use their Asset Management link to discover locked assets and unlock them when necessary. If you are a Usage Controller, you can display all assets in progress from your active administration group's asset source by clicking on your **Asset Management** left navigation item. This action provides a page where you can use the assets in progress filter to display a list of assets you are interested in. From this list, you can click the **[Unlock]** link corresponding to any asset you wish allow edit access.

Working With Assets in Progress

This page displays a list of the assets in progress you have available to you from the library's asset source. There are three tabs provided, and the tab that is displayed is the tab that was active the last time you displayed this page. Each row contains information about an asset in progress: asset name and version, plus other information established as classifier columns by your library, project or user settings. In addition, there is an **[Edit]** link for each asset which is available for edit (to display the asset edit page) and the asset name provides a link to the read-only display of asset in progress information.

If you are an Asset Capture Engineer, you can display this page by clicking on the **Assets in Progress** item in your left navigation bar.

From this page you can:

- View the assets you currently have locked.
- View a list of your recently edited assets and their current status.
- Click on an **[Edit]** link to display the Edit Asset page in order to make changes to an asset.
- Click on an asset name link to display the asset source information for an asset. Note: this will display a read-only view of the information for the asset in progress.

This page contains the following selections and information:

Home

Click on this link to display your home page.

Locked Assets tab

Your locked assets are shown in this group in alphabetical and version order. Hover over a column to click on a sort arrow which provides the means to select a different sort order. This list includes any assets you have selected for edit and have not unlocked or submitted. These assets are not available to other Asset Capture Engineers for modification. No one else can edit an asset locked by you until you unlock it. When you submit an asset for publish, it is automatically unlocked. Alternatively, you can open the asset's edit page and select the **Unlock** link to make it available to others.

The following information is displayed for each asset you have locked:

Actions

[Edit] Click on the **[Edit]** link corresponding to an asset to display the Edit Asset page, enabling you to modify asset information and/or take action on the asset.

Asset Name (version)

This is the name and version of the asset. Click on the Asset Name (version) link to display a read-only view of the information for the asset in progress.

Other...

Other columns of classifier information may be displayed, based on the settings established for your library, your project or your account. Use the Change Classifier Columns control located at the bottom of the page to change the classifiers used.

Last Edit

The date and time the asset was last modified in the asset source.

Recently Edited Assets tab

The Recently Edited Assets tab displays a subset of the assets available to you, which includes assets you have recently created or recently edited. This list is paginated and is sorted in descending order by the last edit date. Hover over a column to click on a sort arrow which provides the means to select a different sort order.

The following information is displayed for each asset you have recently edited:

Actions

[Edit] Click on the **[Edit]** link corresponding to an asset to display the Edit Asset page, enabling you to modify asset information and/or take action on the asset. This link is only available when the asset's Edit Availability column shows the asset is available for edit.

Asset Name (version)

This is the name and version of the asset. If you hold your mouse pointer over the asset name, the asset description is displayed. Click on the Asset Name (version) link to display a read-only view of the information for the asset in progress.

Edit Availability

If this asset is available for edit, this column displays the status of *Available*. If, however, the asset is locked by a user, this column displays *Locked by <user name>*, where the name of the locking user provides a link to generate an email to this user. If the availability is set to *Locked by Repository Application*, the asset has been submitted for publication or deletion, and is pending approval.

Active Changes

This column provides a change status for the asset. One of four status values will be displayed. If you are the one who submitted the asset for publish, a link is provided to the request details page.

- None - No changes have been made to the asset in progress since the asset was last published, or the asset was created but has not yet been submitted for publish.
- Unsubmitted Changes - Changes have been made to the asset in progress since the last publish; the asset has not yet been submitted for publish since these changes were made.
- Changes Submitted for Approval - Changes have been made to the asset in progress since the last publish; the asset has been submitted for publish since these changes were made. The submission request is pending approval.
- Deletion Requested - An Asset Capture Engineer has requested that this asset be deleted from the asset source and your library. The deletion request is pending approval. With this status, the asset will show as locked and will not have an edit link.

Other...

Other columns of classifier information may be displayed, based on the settings established for your library, your project or your account. Use the Change Classifier Columns control located at the bottom of the page to change the classifiers used.

Last Edit

The date and time the asset in progress was last modified in the asset source. Your list of recently edited assets is ordered by the value in this field, in descending order.

All Assets in Progress tab

The All Assets in Progress tab provides access to all the available assets which you have the authority to edit. This list is paginated and is sorted in descending order by the last edit date. Hover over a column to click on a sort arrow which provides the means to select a different sort order. In addition, this tab provides a filter widget at the top to enable you to display a portion of the assets available to you.

You can use the filter widget to apply a filter based on asset name, owning group, edit availability and the change status.

The following information is displayed for each asset in progress:

Actions

[Edit] Click on the **[Edit]** link corresponding to an asset to display the Edit Asset page, enabling you to modify asset information and/or take action on the asset. This link is only available when the asset's Edit Availability column shows the asset is available for edit, or when it is locked by the current user.

Asset Name (version)

This is the name and version of the asset. If you hold your mouse pointer over the asset name, the asset description is displayed. Click on the Asset Name (version) link to display a read-only view of the information for the asset in progress.

Owning Group

The group that owns the asset.

Edit Availability

If this asset is available for edit, this column displays the status of *Available*. However, if the asset is locked by a user, this column displays *Locked by <user name>* where the name of the locking user provides a link to generate an email to this user. If the availability is set to *Locked by Repository Application*, the asset has been submitted for publication or deletion, and is pending approval.

Active Changes

This column provides a change status for the asset. One of four status values will be displayed. If you are the one who submitted the asset for publish, a link is provided to the request details page.

- None - No changes have been made to the asset in progress since the asset was last published, or the asset was created but has not yet been submitted for publish.
- Unsubmitted Changes - Changes have been made to the asset in progress since the last publish; the asset has not yet been submitted for publish since these changes were made.
- Changes Submitted for Approval - Changes have been made to the asset in progress since the last publish; the asset has been submitted for publish since these changes were made. The submission request is pending approval.
- Deletion Requested - An Asset Capture Engineer has requested that this asset be deleted from the asset source and your library. The deletion request is pending approval. With this status, the asset will show as locked and will not have an edit link.

Other...

Other columns of classifier information may be displayed, based on the settings established for your library, your project or your account. Use the Change Classifier Columns control located at the bottom of the page to change the classifiers used.

Last Edit

The date and time the asset in progress was last modified in the asset source. Your list of recently edited assets is ordered by the value in this field, in descending order.

Editing Assets

Assets in your library are originally created in the asset source. These assets are called "assets in progress" to distinguish them from the published assets. An asset in progress is visible only to those users assigned the role or roles necessary to create and edit it. When an asset in progress is approved for publish into the library, a copy of the information in the asset in progress is made and used to create a published asset. Published assets are visible to your library's Asset Users, subject to library configuration related to asset visibility. Asset modifications are accomplished by editing an asset in progress and submitting the changes for publish. If the publish request is approved, the published asset information is refreshed to reflect the changes made to the asset in progress.

Roles Needed for Asset Edit

In general, if you are an Asset Capture Engineer you can make changes to any assets within your assigned scope of responsibility. However, in some cases additional roles may be required to edit specific types of assets at certain lifecycle stages, or specific metadata elements within an asset type, depending on your library configuration. See your Library Administrator for more information on asset metadata edit constraints.

- Edits you make to an asset in progress are reflected in its corresponding published asset only after the asset has been submitted and approved for publish.
- You have the ability to edit the asset metadata included on the asset edit page, with the exception of any elements that are designated as read-only or are constrained to be edited by a role you are not assigned.
- The assets available in the All Available Assets tab of your Assets in Progress include all assets of the type or types you are assigned to edit which are owned by groups within the scope of your role assignments.

Performing Asset Edit

Editing an asset involves these high-level steps:

1. Find the asset you wish to edit using one of these methods:
    1. Click on **Assets in Progress** in your left navigation bar to display the three tabs that list assets in your library's asset source. Then click the **[Edit]** link for your asset from one of the lists provided.
    2. Display a published asset by using the search mechanism of your choice, such as by using the asset tree, the Search Box or a model based search. Next, click on the **[Edit]** link provided for the asset in the search result.
    3. If you're coming from an Edit Asset page, open the expandable item on the right side of the page and use the quick search to display the asset in progress in the quick result list. Next, click the asset name in the quick result list to open it into a popup window. Finally, click the popup window icon provided to bring the asset into primary focus and click **[Edit].**
2. Make the necessary changes to the asset information. Note that Changes to the asset in progress are automatically saved according to the interval you establish for your account. See Manage My Account for more information. Optionally, you can save your changes periodically by explicitly clicking **[Save]**
3. Click **[Submit]** to submit your asset for publish. This action may trigger asset validation and/or asset submission governance depending on your library configuration.
4. If your submission for publish does require governance approval, you can follow the status of your submission request by clicking on **My Requests** in the left navigation bar.

For more information about editing assets, see Edit Asset.

Asset Edit

This page provides a complete view of information stored in the asset in progress. You can modify asset information on this page. This page also makes a number of links available for actions on this asset in progress.

Any changes you make to the asset in progress are saved to the library asset source. In addition, the updated information can be submitted for publish by yourself or another Asset Capture Engineer when it is ready to be shared with the asset user community. Changes to the asset in progress are not used to update the published asset until the asset in progress is republished. See About Editing Assets for more information.

You can display an asset's Edit Asset page if you are an Asset Capture Engineer responsible for the asset and also hold any other roles necessary for editing the asset at its current lifecycle stage. There are various ways to display an Edit Asset page corresponding to an asset you wish to modify:

- When you create a new asset the Edit Asset page is displayed automatically after you click **Create** on the Create Asset page.
- To return to an Edit Asset page for an existing asset in progress, choose the corresponding **[Edit]** link from an assets in progress list.
- Once an asset has been published at least once, you have the option to open an asset for edit by clicking on the **[Edit]** link available on its published asset information page. Note: the edit link will only appear on published assets that fall within your scope of Asset Capture Engineer responsibilities.

Click on any of the following topics to learn more about editing sections of the asset in progress:

Edit Asset Page Contents

Status Icon

Edit Asset Information Page Links

Overview

Attributes

Asset Context

Artifacts

Classifiers

Relationships

Role-based Asset - Editing Assets in Progress

Quick Search

Edit Asset Page Contents

Detailed asset in progress information is divided into three main sections: Overview, Attributes and Relationships. Within the Attributes section you have access to three sub-sections: Asset Context, Classifiers and Artifacts. Asset metadata can be edited in the elements of each section by clicking on the value space corresponding to the element.

This page contains the following links and information:

Edit Asset Page Header

- Asset Type Icon - Displays the icon that is used as quick reference for the asset type classifier.

- Asset Name and Version

Status Icon

Directly below the asset icon, a validation icon is displayed representing the validation status of the asset. This icon indicates whether or not the asset currently meets all constraints supplied by its capture template and the results of any additional validation provided for the edit of this asset in your library configuration.

Asset Validation

Asset validation is first performed when an asset in progress is created or opened for edit. Initially, the asset's validation icon represents whether asset content meets the specifications established by its associated capture template. Capture Template validation is also run each time a section of asset metadata is modified and saved. In addition, further validation may be employed when you click **[Validate]** or **[Submit]**. Validation beyond that supplied by the asset's capture template is optional and depends on your library's configuration for the asset you're editing. Note: additional asset validation can also come into effect during asset creation and the creation of a new version. See your Library Administrator for more information about asset validation.

Validation Icon Types

When an asset successfully validates, an icon with a green check mark is displayed. In other cases one of three other types of icons is displayed with corresponding validation information provided as a tool tip. You can display the tool tip by hovering over a validation icon. Notice that the tool tip remains open until you either close it or select another validation icon on the asset edit page. Validation icons include:

- **Green Check Mark** - asset validation is fully successful and no validation errors, warnings or overrides exist.
- **Red X** - validation errors exist and possibly warnings and overrides as well. When this icon is displayed, the asset cannot be successfully submitted for publish.
- **Yellow Warning Triangle** - validation warnings exist and possibly overrides as well. The asset can be successfully submitted for publish if you choose to ignore the warnings. Note: validation warnings will be included on the Request detail page if the asset submission is governed.
- **White with Blue !** - validation overrides exist. This icon provides access to information related to the overrides that have occurred. The asset can be successfully submitted for publish.

Edit Asset Page Links

The links shown on the Edit Asset page include the predefined and custom user actions configured for your library. Depending on your library configuration, an item may display as a link directly on the Edit Asset page, or it may be shown as an option under the [More Actions] link. A Library Administrator typically configures the user actions so that the most commonly-used options are shown as links directly on the page, and the less commonly-used options are shown as links on the [More Actions] menu.

Home

Click on this bread crumb link to display your home page.

Assets in Progress

Click this bread crumb link to display a list of your assets in progress.

[Submit]

Click on **[Submit]** to present the asset in progress information for potential publish to the library. Any external validation in place for the asset is performed. If the validation results are:

- successful validation - the asset is submitted for publish and may become subject to the asset production governance process for the asset. See Submitting an Asset for Publish/Republish for more information.

- warnings and/or overrides, but no validation errors - a popup dialog is displayed listing the warnings and overrides. You are prompted to choose between ignoring the warnings/overrides to continue with the publish submission or to abort the submission. Aborting the submission will return you to the Edit Asset page with updated status icons and tool tip validation results.
- validation error(s) - you are returned to the Edit Asset page with updated status icons and tool tip validation results.

Star Icon

The star icon indicates that you've made changes to the asset in progress that are not yet saved to the asset source. You can click the **[Save]** link to explicitly save changes to the asset in progress. Note: asset changes are also saved automatically according to the interval designated in your account. See Manage My Account for more information.

[Save]

Click the **[Save]** link to save changes to the asset in progress.

[Validate]

Clicking on **[Validate]** causes external validation to be performed, if any is in place for the asset. Validation results are reflected in the status icons of the asset and details are included in the corresponding tool tips.

[Unlock]

When you open an asset in progress for edit, the asset is locked for your use and becomes unavailable for edit by any other Asset Capture Engineers. If you edit an asset and do not choose to submit it for publish, it remains locked for your use until you click **[Unlock]** to release it. An asset in progress is also unlocked automatically when you submit the asset for publish.

[Delete]

Click on this link to completely remove this asset in progress and its corresponding published asset (if it has been published) from your library. The result of clicking on **[Delete]** varies with the configuration of your library's asset deletion governance process. See Submitting an Asset for Delete for more information.

[Create Like]

Click on this link to create a new asset in progress that will be similar to this asset. The new asset in progress will automatically be populated with metadata according to the asset template provided for the Create Like function by your library configuration. You can edit this asset as necessary before submitting it for publish.

When you click Create Like, you are transferred to the Edit Asset page of the new asset. By default, the new asset will be named with the same name as the original asset, but with words "Copy of" added to the beginning of the name. You can edit the asset name to provide the correct asset name according to your convention. See your Library Administrator for more information.

[Revert Asset Changes]

Click this link to remove all changes made to the asset in progress since it was last published. By clicking this link, the information for the asset in progress is re-set to contain the current information of its corresponding published asset. Note: this link is only available if the asset has been published at least once and there have been changes made to the asset in progress since the last publish. See [Show Changes] for information on viewing the differences between the current asset in progress and the published asset.

[Show Published Asset]

Click this link to display the published asset corresponding to this asset in progress. This link is not available if the asset has never been published.

[Email]

Click this link to open a new email message in your default email client that includes a URL link for the asset in progress. The recipient of your email must have access to the library where the asset is located and also hold the Asset Capture Engineer role in order for the link to successfully bring them into the asset in progress.

[Show Relationship Tree]

Click on this link to display a list of assets related to this asset in a new popup window. Related assets are depicted in a hierarchical manner. Click the +/- icons to expand/contract the sections of the display. See Asset Relationship Tree for more information.

Click on this link to display a graphical Asset Relationship Visualization (ARV) view which will display in a new browser window. The Asset Relationship Visualization provides you the capability to view assets in your library that are related to the asset you are interested in. See Asset Relationship Visualization for more information.

[Show XML]

Click on this link to display the asset's XML file in a new browser window. The **Show XML** link is only available if you have the role of Usage Controller, and if your library configuration includes the definition for this custom user action.

[Show Changes]

Click on this link to display the change history for the asset as a text document in a new browser window. The **Show Changes** link is only available if you have the role of Usage Controller, and if your library configuration includes the definition for this custom user action. User-defined metadata changes are not shown as differences.

[Return to Parent]

This option will return you to the parent asset you were viewing originally. Note: This option only becomes available when you have previously clicked on a related asset name and taken the action to open this related asset into the main window for primary focus.

[More Actions]

This link displays a menu with links to user actions your Library Administrator configured for display on the secondary menu.

+ or - Icon (Blue on White)

Use the corresponding **+** or **-** icon to expand or collapse a section. You can also click on the section heading to perform this toggle.

Overview

See Overview for more information about this section of the edit asset page.

Attributes

See Attributes for more information about this section of the edit asset page.

Asset context

See Asset Context for more information about this section of the edit asset page.

Classifiers

See Classifiers for more information about this section of the edit asset page.

Artifacts

See Artifacts for more information about this section of the edit asset page.

Relationships

See Relationships for more information about this section of the edit asset page.

Role-based Asset - Editing Assets in Progress

Roles you are assigned in conjunction with the Asset Capture Engineer role can affect the display and availability of metadata on your asset edit page. If your library is configured for role-based asset edit, the artifacts, classifiers, and relationships included on the Edit Asset page will be based on the group roles you are assigned for the owning group of the asset.

- The metadata view(s) corresponding to your assigned roles determine the asset information you see and the order in which it is presented.
- If you have multiple role assignments related to asset edit presentation, your asset edit page represents a composite of all asset edit views corresponding to these roles.
- Changing the asset's owning group may change the asset metadata available for editing, if your role assignments differ for the new owning group.
- If your library is using role-based asset editing, but you do not hold any group roles for an asset's owning group other than Asset Capture Engineer, your asset edit pages will include the default asset elements determined by your library configuration for this situation.
- If your library is not using role-based asset editing, all Asset Capture Engineers assigned responsibility for an asset will see the default metadata elements for the asset, as configured by your Library Administrator.

For more information on your library's configuration for role-based asset editing, please see your Library Administrator.

Quick Search

When viewing an asset in progress, you may find it useful to view other assets at the same time, in a secondary snapshot window. This can be useful, for example, as a way to identify related assets or assets you may wish to establish a relationship with. You can do this by using the Quick Search pane to search for assets while leaving the current asset information in view. While the Quick Search pane is hidden by default, you can make it visible by dragging the edge of the pane to the left while viewing a published asset. For more information, see Quick Search for Assets in Progress.

Editing Attributes

The Attributes section provides access to Asset Context, Classifiers and Artifacts. Click on the **+ Icon** to expand the Attributes section to view the asset context, classifiers and artifacts sections for edit.

From this page you can:

Edit, remove and add metadata to the asset context, classifiers and artifacts of an asset.

Click on the following topics to learn more about the information provided on this page:

Attributes Asset Validation

Attributes Header

Edit, Add and Remove Attributes Options

Working with Attributes

Attributes Asset Validation

Asset validation is performed on the asset you are editing. Validation results for asset context, classifiers and artifacts are displayed as a status icon at the top of the Attributes section with a tool tip. See asset status icon for information on the types of asset validation performed and when each type is performed.

When validation results in anything short of a fully successful validation, the details are presented in the tool tip associated with the asset's validation icon. In addition, any messages produced that pertain to a particular asset context, classifier and artifact included in the asset are also presented next to the individual value.

Attributes Header

The following icons, controls and columns are displayed in the Attributes Header:

Asset Validation Icon is displayed next to the section title.

Green + Icon - Click the **Green +** icon to open a pop up add new attribute window which allows you to add additional artifacts or classifiers. Click the dropdown and select an artifact or classifiers to be added, click the **Next** button. Enter the correct information and hit the **Save** button.

Red - Icon - The **Red -** icon will remove a classifier or artifact if allowed. Highlight the row of the classifier or artifact to be deleted and then click on the **red -** icon.

+ or **- Icon** to expands or collapses this section.

Name and Value - The Name and Value column headers show the metadata name and it's corresponding value. The vertical line between name and value can be moved right or left to increase or decrease the column width.

Edit, Add and Remove Attributes Options

When editing in the Attributes section can use the **Green + Icon** and **Red - Icon** for adding and removing asset context, classifiers and artifacts. Asset Context, Classifiers and Artifacts sections have there own edit, add and remove options. To see these options go to Asset Context, Classifiers, and Artifacts for more information.

Editing Overview

This section provides a view of the asset overview. The overview of an asset may provide an expanded description of the asset. Click on the **+ Icon** to expand the Overview section for edit.

From this page you can:

Write a detailed description of the asset as well as add, edit and remove to the overview.

Click on the following topics to learn more about the information provided on this page:

Overview Asset Validation

Overview Header

Edit, Add and Remove Overview Options

Working with Overview

Overview Asset Validation

Asset validation is performed on the asset you are editing. Validation results for asset overview are displayed as a status icon at the top of the Overview section with a tool tip. See asset status icon for information on the types of asset validation performed and when each type is performed.

When overview validation results in anything short of a fully successful validation, the details are presented in the tool tip associated with the asset's overview validation icon.

Overview Header

The following icons and options are displayed in the Overview Header:

Asset Validation Icon is displayed next to the section title.

+ or **- Icon** to expand or collapse this section.

Edit, Add and Remove Overview Options

Edit Options for Overview

- **Edit** the Overview by right mouse click to display a context menu offering the option of **Edit** or double click on the white space inside this section. A Change Asset Overview popup will be displayed. After you finish with your overview click the **Save** button.
- **Add** to the overview by opening the Change Asset Overview popup and adding the text desired.
- **Remove** parts or all of the overview by highlighting the text you want to delete and press the delete key on your keyboard.

Right Mouse Options context menu

- **Edit** - will open the Change Asset Overview popup for edit.
- **Add** - is not available in the Overview section.
- **Remove** - is not available in the Overview section.

Change Asset Owning Group

If you are an Asset Capture Engineer, you can change the owning group of an asset in the asset context section of the asset edit page. To change the owning group, double-click on the Owning Group field, and you will be presented with the Change Asset Owning Group dialog.

You can also change the owning group of an asset without opening the asset for edit. To do so, view the assets in progress, click on your asset to display it, and use the **[Change]** link provided to change the owning group.

Change Asset Owning Group dialog contents

This dialog contains the following selections and information:

Filter by name

If you are assigned to work with a large number of groups, you can make it easier to find the one you want to work with by typing in part of the name and clicking on the **Apply Filter** button. The list of groups is refreshed to reflect only those whose name contains your filter.

Group List

The groups to which you are assigned as Asset Capture Engineer are listed, optionally filtered by name. Information shown for each group includes the Name and Description. Your current selection is shown by default.

Updating the owning group selection

To select a different owning group for your asset, select the radio button next to the group you wish to assign the asset to.

Save

Click on this button to set the asset's owning group to the group you selected.

Cancel

Click on the **Cancel** button to exit the dialog without changing the asset's owning group.

Change Project Context

If you are an Asset Capture Engineer, and your library is configured to use asset-based acquisition, you can change the project context of an asset in the asset context section of the asset edit page. To change the project context, double-click on the Project Context field, and you will be presented with this dialog.

You can also change the project context of an asset without opening the asset for edit. To do so, view the assets in progress, click on your asset to display it, and use the change link provided to change the project context.

Change Project Context dialog contents

This dialog contains the following selections and information:

Filter by name

If you are assigned to work with a large number of projects, you can make it easier to find the one you want to work with by typing in part of the name and clicking on the **Apply Filter** button. The list of projects is refreshed to reflect only those whose name contains your filter.

Project List

The projects to which you are assigned as a participant are listed, optionally filtered by name. Information shown for each project includes the Name and Description. Your current selection is shown by default.

Updating the project context selection

To select a different project context for your asset, select the radio button next to the project you wish to assign the asset to.

Save

Click on this button to set the asset's project context to the project you selected.

Cancel

Click on the **Cancel** button to exit the dialog without changing the asset's project context.

Change Asset Capture Template

You can change the capture template associated with the asset. Each asset is assigned an asset type upon creation. Once a type is selected, a set of one or more corresponding templates are available to assign to the asset. The asset's capture template is used to define the asset and constrain and validate its information during creation and subsequent update. If there is more than one template associated with the asset's type, you can choose to switch the asset template to a different one associated with the type.

None of the changes described above will result in a loss of asset metadata. However, in changing the asset's capture template, you may be imposing new or different constraints on the asset metadata. Therefore, when the asset is modified and republished, the new template will be used to constrain its values and validate it for publish.

If you are an Asset Capture Engineer, you can edit the asset capture template by displaying the asset edit page and selected to edit the asset context.

Edit Asset Identifiers

This page allows you to modify the asset context information of an asset. The Asset Context section of Attributes allows you to make changes to the asset context values defined for your asset. In addition, an asset will contain some asset context that are presented as read-only.

From this page you can:

> View the asset validation, current status, and capture template of the asset in progress. You can also can also take various actions to the asset context metadata.

Click on the following topics to learn more about the information provided on this page:

Working with Asset Context

Asset Context Validation

Edit Asset Context Options

Right Mouse Options context menu

Working with Asset Context

The current asset context for the asset are displayed in this section and some of these values are also available for edit.

- **Asset Type**: Is the value of the asset type classifier
- **Capture Template**: Identifies the capture template currently in use to validate asset information.

  You can modify the capture template associated with an asset. The set of capture templates available are those that are associated with the asset type you designated and may also be limited to the templates appropriate for the lifecycle stage of the asset. The capture template you choose determines the classifiers, artifacts, and relationships that are available for use in defining the asset. The capture template provides validation constraints that will govern the capture and update of the asset. In addition, the template associated with your asset can designate which types of artifacts, relationships or classifiers will populate the corresponding entry/edit pages for these categories of metadata by default.
- **Name**: The name of the asset your creating or editing. The maximum number of characters allowed for an asset name is 320.
- **Version**: Enter the version of the asset you are creating. It is useful to have the asset name and version (combined) be unique for each asset in your library. However, this is not required as each asset is assigned a unique asset ID in your asset source. The maximum number of characters allowed for an asset version is 40.
- **Aliases**: An alias is used as an alternate asset name. Enter one or more alternate names for your asset. You can search for an asset by name and the search will include asset aliases as well, depending on your library configuration. The maximum number of characters allowed for an asset alias is 320.

  Note: if the alias field is not displayed, or alias editing is not available, this means your library's metadata view configuration is constraining the alias classifier. See your Library Administrator for more information.
- **Description**: Enter a description of your asset. The description is used to provide brief information about the asset for display throughout the application. The maximum number of characters allowed for an asset description is 480.
- **Created**: The date this asset was created as an asset in progress.

- **Last Updated**: The date this asset was last published.
- **Owning Group**: The name of the group which owns the asset. You can change the owning group associated with your asset. The groups provided in your list of options represent those groups in which you are assigned as Asset Capture Engineer as well as their subordinate groups. See About an Asset's Owning Group for more information.
- **Project Context**: You can change the project chosen as the project context for this asset. The Project Context field is used for acquiring assets if your library is configured to support asset-based acquisition. The projects provided in your list of options represent those projects where you are assigned as a participant. See asset-based acquisition for more information. If your library is not configured to support asset-based acquisition, this field may not be present.
- **Active Changes**: A status field which reflects the status of asset information as compared to its corresponding published asset. One of four status values (listed below) will be displayed and a **[Show Changes]** link may be available. If you submitted the asset for publish, you are provided a link to the request details page.
  - Active Changes status include:
    - None - No changes have been made to the asset in progress since the asset was last published. This is also the status shown when an asset has not yet been published for the first time.
    - Unsubmitted Changes - Changes have been made to the asset in progress since the last publish of the asset. The asset has not yet been submitted for publish since these changes were made.
    - Changes Submitted for approval - Changes have been made to the asset in progress since the last publish of the asset. The asset has been submitted for publish since these changes were made. The submission request is pending approval. To view the request information click the **[Details]** link. Note, this asset cannot be edited until request has been approved or rejected.
    - Deletion Requested - An Asset Capture Engineer has requested that this asset be deleted from the library. The deletion request is pending approval.
  - **[Show Changes]:** If the asset has been published previously, this link will appear when the asset in progress has changed from the last time the asset was published. This link is not available until the asset has been published for the first time. Click on this link to open a browser window showing differences between the asset in progress and the information last published for the asset. Additions, modifications or removals of asset information are displayed in sections corresponding to metadata types: context, artifacts, relationships and classifiers. Asset information that has not changed is not included in the differences window, though it remains displayed in the original browser window of the asset in progress. User-defined metadata changes are not shown as differences.
  - In some cases when by-value artifacts are modified, asset differences information will include a **[File Differences]** link. File difference links are available where your library configuration supports the comparison of the artifact type. For example, file difference links may be available when the mime type of the modified artifact is either XML or a type corresponding to an artifact comparator defined in your library's configuration. File difference links, if available, are provided for changed artifacts in the Artifacts>Modified section. They enable you to display specific file differences in addition to the "old value" and "new value" file links. See your Library Administrator for more information about your library's configuration for displaying changes to asset artifacts.

Asset Context Validation

Asset validation is performed on the asset you are editing. Validation results for asset classifiers are displayed as a status icon next to each deficient classifier and at the top of the Asset Context section with a tool tip. See asset status icon for information about the types of asset validation performed and when each type is performed.

When asset context validation results in anything short of a fully successful validation, the details are presented in the tool tip associated with the asset's asset context validation icon. In addition, any messages produced that pertain to a particular asset context included in the asset are also presented next to the individual asset context.

Edit, Add and Remove Asset Context Options

Edit options for Asset Context

- **Edit** an existing asset context field by using a right mouse click to display a context menu offering the option of **Edit**, or by double clicking on the value column. If the field can be edited, the box will either change to an editable entry box with the text highlighted, or a dropdown box or a popup will appear to show the options for that metadata type.
- **Add** an additional value to the Aliases field by double clicking on the value column, or by using a right mouse click to display a context menu offering the option of **Edit**. A popup will be displayed with an **Add** button. Click the **Add** button and enter the value desired for Aliases. To add an additional value, click the **Add** button. When complete, click the **Save** button. Unless constrained by the asset's template, you can add more than one value for the aliases field.
- **Remove** an Alias value by double clicking on the value column, or by using a right mouse click to display a context menu offering the option of **Edit**. A popup will be displayed with a **Remove** button next to the value to be removed. Click the **Remove** button to delete the value desired. When complete, click the **Save** button. Unless constrained by the asset's template, you can remove more than one value for each asset context type defined for your asset.

Your asset context type and value widgets may differ according to the definition of the asset context in the asset's template. For example:

- Values provided for read-only asset context cannot be removed, except by users who are assigned the Usage Controller role in addition to Asset Capture Engineer. Some items can never be changed or removed, for example the asset type or asset creation date.
- If a value is required for an asset context type, the **Remove** option will not be available unless you have entered more than the required number of values for that type.
- If only one value is allowed for a required asset context type, you can only edit the value.
- Some non-required asset context values can only be removed by highlighting the value and hitting the delete button on your keyboard.

Right Mouse Options context menu

- **Edit** - will open the selected asset context value for edit. Note: the availability of this feature depends on the type of asset context.
- **Add** - is only available when doing a right mouse on the Asset Context title row. Select the Asset Context you want to add, if it is available from the drop down.
- **Remove** - is not available in the Asset Context section.

Note: some right mouse options may not be available depending on the configuration of your library.

Edit Asset Artifacts

This page describes the Artifacts section, common library configuration and controls for specific types of artifacts. The Artifacts section of Attributes allows you to make changes, additions or deletions to the artifacts included with the asset you are editing. There may be some artifacts presented as read-only.

From this page you can:

> View the current asset validation for the artifacts section and edit, add and remove artifacts to the asset in progress.

Click on the following topics to learn more about the information provided on this page:

Working with Asset Artifacts

The names and values for the asset's current artifacts are displayed in this section. The artifacts for an asset are the files, text and referenced information included in the asset's metadata. Artifacts that are required are determined by the capture template associated with the asset. Additional artifacts may be included as well. Validation status will show an error until all required artifacts are added, as specified in the asset template.

Asset Validation - Artifacts

Asset validation is performed on the asset you are editing. Validation results for asset artifacts are displayed as a status icon next to each deficient classifier and at the top of the Artifact section with a tool tip. See asset status icon for information about the types of asset validation performed and when each type is performed.

When artifact validation results in anything short of a fully successful validation, the details are presented in the tool tip associated with the asset's artifact validation icon. In addition, any messages produced that pertain to a particular classifier included in the asset are also presented next to the individual artifact.

Edit, Add and Remove Artifact Options

- **Edit** - an existing artifact field by right mouse click to display a context menu offering the option of **Edit** or double clicking on the value column and if the field can be edited an Edit Artifact popup window will appear for that artifact type. Click the **Save** button for the changes to be saved to the asset in progress. These changes, if saved, will not appear in the published asset until you republish it. Note: you cannot edit the value of an artifact designated as read-only unless you are assigned the Usage Controller role in addition to Asset Capture Engineer.

- **Add** - an artifact field that is displayed on the asset in progress page, by going to the Artifacts title row, right mouse click to display a context menu offering the option of **Add** or go to the green + icon in the Attributes section and select an artifact name label from the dropdown list. Artifact types that are not yet included for the asset or for which the template allows additional instances can be added by clicking the **green + icon** or by right mouse click to display a context menu offering the option of **Add** and select an artifact name label from the dropdown list.

In some cases, whether an artifact can be provided as a reference, a file or a description is constrained by the asset's capture template.

- **Remove** - an existing artifact by right mouse click to display a context menu offering the option of **Remove** on the artifact or by highlighting the row and clicking on the red - icon in the Attributes section. If you save this page after removing an artifact, the artifact will be removed from the asset in the asset source. These deletions, if saved, will not appear in the published asset until you republish it. Note: you cannot remove the value of an artifact designated as read-only unless you are assigned the Usage Controller role in addition to Asset Capture Engineer.

  Your artifact type and value widgets may differ according to the definition of the artifact in the asset's template. For example:

  - Values provided for read-only artifacts cannot be removed, except by users who are assigned the Usage Controller role in addition to Asset Capture Engineer.
  - If a value is required for an artifact type, the **Remove** feature will not be available unless you have entered more than the required number of values for that type.
  - If only one value is allowed for a required artifact type, clicking on **Remove** will not allow you to remove the artifact. You can edit the artifact but not remove.

Right Mouse Options context menu

- **Edit** - will open the selected artifact value for edit.
- **Add** - will allow you to add an artifact or add additional metadata to the highlighted artifact.
- **Remove** - will remove the highlighted artifact value.

Note: some right mouse options may not be available depending on the configuration of your library.

Artifact Types

The artifact values that are currently included with the asset are listed to the right of the corresponding artifact type. If the type of artifact you wish to add is already listed on this page, simply double click on the value related to the artifact to bring up the Edit Artifact popup. Choose from the drop down whether the artifact will be referenced, included as a file or consists of text. If you want to add an additional instance of an artifact type, click on the **green + icon** on the Attributes title section or by doing a right mouse click to display a context menu offering the option of **Add** in order to open a new Edit Artifact popup. If the artifact type you wish to add is not yet displayed on this page, choose it by clicking the **green + icon** and selecting from the **Add New Attribute** drop down list.

When you are creating a new instance of an artifact, choosing one of the three selections from the dropdown list designates the form of the artifact you are creating.

- URL -- Entering an artifact as a URL enables you to enter a URL reference to the source of the artifact itself. When the asset is found by a library user, they will examine or download this form of artifact from the source (not from the asset in the library). This is called a *by-reference* artifact. Your application supports standard URL format and also certain custom URL protocols. Please see your System Administrator for more information.
- File -- Entering an artifact as a file enables you to upload the actual file into the library asset. This form of artifact is persisted in your library. When the asset is found by a library user, they will examine or download this form of artifact from the asset in the library. You can create a "file" artifact by typing in its path or by clicking on Browse to point to it. This is called a *by-value* artifact. Note: an artifact file name is limited to 160 characters.
- Description -- Entering an artifact as a description enables you to use text to describe either the artifact itself or how the library user would locate and obtain the actual artifact. In this form, the artifact description is stored in your library. This is called a *by-description* artifact.

Once you select the form of the artifact you are entering, the widgets available adjust accordingly to support your entry of the artifact in the form chosen. Artifact information is entered into the text box provided.

- *URL*, a link is displayed to allow you to launch the artifact referenced.
- *File*, a **Browse** button is made available to enable you to browse to the file you wish to include.
- *Description* artifact, the text box is expanded to accommodate the text you will enter.

Determining which artifact types are offered in this section and in what order

The types of artifacts available to be included with the asset are either listed in this section or are available from the drop down list by using the **green +** icon or by right mouse click to display a context menu offering the option of **Add** on the artifacts title line. Whether or not an artifact type appears in this section or in the drop down list is determined initially by its definition in the asset's capture template. An artifact type will be listed on the Editing Asset Artifacts section if:

- The capture template specifies its inclusion. See the Configuration Designer Capture Template Editor for more information about *Always insert this relationship into the asset editor if not yet specified*.
- It has been assigned a value. Artifacts that have a value entered for the asset will appear on the Edit Artifacts section.
- The capture template designates that a value is required for this artifact type. See the Configuration Designer Capture Template Editor for more information about the *Minimum occurrences* setting.

The order of the artifacts included on the Edit Artifacts section is alphabetic by default. However, artifact display order can be designated explicitly through use of metadata view configuration. See the documentation provided with Akana Configuration Designer for more information.

Read-only Artifact Values

The Artifact section may include some artifacts that are "read only." Read only artifacts are provided for the purpose of displaying values to the Asset Capture Engineer, though the values are not available for edit. Read-only artifact values are created and edited by users who are assigned the Usage Controller role in addition to the Asset Capture Engineer role for the asset.

Email Artifacts

Email artifacts, if configured in your library, require special processing that is different from other artifact types. For more information, see Email Artifacts.

User Defined Artifacts

User Defined artifacts allow you to add information to an asset that is not predefined in your library's configuration. While providing flexibility, this type of artifact is not searchable and will not be included in asset comparison operations. You cannot add a description to user defined artifacts, so the name you provide for the item should make its purpose clear.

Edit Asset Relationships

This section allows you to make changes to the relationships defined for an asset. There may be some relationships presented as read-only which do not allow edit except by users that have the Usage Controller role in addition to the Asset Capture Engineer role.

The name of the asset being edited is displayed at the top of the page. The current relationship information for that asset is displayed below. If you are an Asset Capture Engineer, you can display this section by by clicking on the **+ icon** corresponding to the relationships section of the Edit Asset page.

From this page you can:

> View the current asset validation for the relationships section and edit, add and remove relationships to the asset in progress.

Click on the following topics to learn more about the information provided on this page:

Asset Validation - Relationships

Edit, Add and Remove Relationship Options

Right Mouse Options context menu

Adding a Relationship using the Quick Search

Add Relationship Popup Control

Buttons at bottom of Add Relationships Popup

Context-enabled Relationships

View Changes

Determining which relationship types are offered and in what order

Read-only Relationship Values

Working with Asset Relationships

The Relationships section for an asset lists the name and version of other assets that are related to this asset. Relationships are grouped by relationship type, which indicates the manner in which the assets are related. Once a relationship is established and the asset is published, the name and version of the related asset is provided as a link on the Asset Information page. In addition, the related asset shows a "reverse relationship" which identifies the asset which registered the relationship. The reverse relationship view may use a different name for the relationship, indicating its direction. The reverse relationship is only shown on published assets; it is not included in the asset metadata for an asset in progress.

The asset relationship can only be edited in the original asset.

Relationships that are required are determined by the capture template associated with the asset. Additional relationships may be included as well. The names and versions of the asset's current related assets are displayed in this section. Validation status will show an error until all required relationships are added, as specified in the asset template.

Asset Validation - Relationships

Asset validation is performed on the asset you are editing. Validation results for asset relationships are displayed as a status icon next to each deficient relationship and at the top of the Relationship section with a tool tip. See asset status icon for information about the types of asset validation performed and when each type is performed.

When relationship validation results in anything short of a fully successful validation, the details are presented in the tool tip associated with the asset's asset context validation icon. In addition, any messages produced that pertain to a particular relationship included in the asset are also presented next to the individual relationship.

Edit, Add and Remove Relationship Options

Green + Icon - will open a pop up Add Relationship window which allows you to add additional relationship types. Click the drop down and select a relationship type to be added. Relationship types that are not yet included for the asset or for which the template allows additional instances will be in the drop down list.

Red - Icon - will remove a relationship. Highlight the row of the relationship to be deleted and then click on the **red -** icon. Note: not all relationships can be removed. See red - icon for more information.

Asset Name (Version) - column displays the name and version of the related asset grouped by seb-sections by relationship type. Additional columns will depend on the classifier columns for the asset lists settings in Manage my Account. The columns can be rearranged by dragging and dropping.

Edit options for Relationships

- **Edit** - an existing relationship can only be done by removing or revoking the relationship. Note: you cannot edit the value of a relationship designated as read-only unless you are assigned the Usage Controller role in addition to Asset Capture Engineer.

- **Add** - a relationship by clicking the green + icon at the top of the Relationship section and an add relationship pop up window will be displayed. Select your relationship type from the drop down menu. User Defined relationships will require a Relationship Name before you can click the **Next** button. A new relationship window will be displayed that will allow you to create a relationship with the asset in progress using one of the following options; search, create a new asset, enter asset information manually, create new version and create like. See Add Relationship Popup Control for more detailed information about the relationship popup control.

- **Remove** - an existing relationship by right mouse click to display a context menu offering the option of **Remove** on the relationship or by highlighting the row and clicking on the red - icon in the Attributes section. Note: some acquired relationships can only be removed after revocation.

  Your relationship type and value widgets may differ according to the definition of the relationship in the asset's capture template. For example:

  - Values provided for read-only relationships cannot be removed, except by users who are assigned the Usage Controller role in addition to Asset Capture Engineer.

  - If a value is required for a relationship type, the remove option will not be available unless you have entered more than the required number of values for that type.

  - If only one value is allowed for a required relationship type, clicking on the remove option removes the relationship from the Relationships section. You will need to re-add a new relationship before the asset will validate.

Right Mouse Options context menu

- **Add** - will allow you to add a new relationship. Note: right mouse needs to be done over an existing relationship or relationship type title.

- **Remove** - will remove the highlighted relationship value. Note: some acquired relationships can only be removed after revocation.

- **Show in Existing Snapshot Window** - if an existing asset details snapshot window is open the relationship asset will open in the existing window. If no snapshot window is open a new window will open with the asset detail.

- **Show in New Snapshot Window** - if an existing asset details snapshot window is open a new snapshot window will be open, leaving the existing snapshot window open. If no snapshot window is open, a new window will open with the asset detail.

- **Edit Asset**- will open the selected relationship in the main content window in the Edit Asset page.

Note: some right mouse options may not be available depending on the configuration of your library.

Adding a Relationship using the Quick Search

When editing an asset in progress you can add a relationship to an asset in progress in the main content window by using the Quick Search. Once you have found the asset you want to create the relationship with in the quick search results, click the name link to open the asset in the Asset in Progress snapshot popup. Click the **green + icon** to open the Add Relationship popup. Select from the dropdown the type of relationship you want to create with the asset in progress in the main content window. The relationship will be added to the asset in progress, or if governance is required the Asset Acquisition Details popup will be displayed. See Context Enabled Relationships for more information about relationship governance.

Note: the **[Save]** link at the top of the page will display the unsaved changes icon when you add a relationship. The relationship additions, if saved, will not appear in the published asset until you **[Submit]** them for republish.

Add Relationship Popup Control

The relationship values that are currently included with the asset are listed to the right of the corresponding relationship type.

The Add Relationship popup allows you to select one of the following radio choices: Note: some of these options may not be available depending on the type of relationship acquisition and your library configuration.

1. **Search for assets(s)** - This option allows you to search for published or assets in progress. See If Search for asset(s) radio is chosen below for more information.
2. **Create a new asset** - This option allows you to create a new version of an asset without having to leave the edit process. The popup will change to allow you to add a new asset. The asset type will come defaulted to the relationship type you selected. See If Create a new asset radio is chosen below.
3. **Enter asset information manually** - This option allows you to enter a related asset's name and version. See If Enter asset information manually radio is chosen below for more information.

- ## If Search for asset(s) radio is chosen:

  - **Search for:** - This search box allows you to further narrow your search results by putting in a search string that refers to the asset your looking for. Example would be to add the word **web*** to the search box to find all assets with the word web in the content. Click the **?** icon for further examples. The relationship type you are working with may be configured to filter the assets shown initially in your result set. See your Library Administrator for more information about filters.
  - **Search button** - Clicking the search button causes the system to use the search string entered in the **Search for:** text box (if any) and the criteria specified by the filter from the Global Definition Template and Asset Capture Template and present the results in the tabbed results section. Clicking the **Search** button without criteria in **Search for:** box has no effect on the tabbed result list. Clicking on the **Search** button when both offer criteria requires matching assets to match both sets of criteria to be included in the results. See **Tabs** below for the next steps in choosing an asset.

    Note: the assets included in your initial Search Results (prior to applying a filter) may be all published assets available or may represent a subset of published assets that meet criteria established for the type of relationship you are creating. For more information about establishing a filtered set of assets to be available for a relationship type, please see Global Definition Template and Asset Capture Template.

Tabs

After performing a search you can pick one or more assets, if the relationship type allow multiple relationships, by selecting a check box from the search results from one or both of these tabs:

1. **Published Asset tab** - Displays a published list of assets that meet the criteria established by the configuration of this asset type and/or any criteria established by selection of a filter and/or entry of a search string in the Related Asset Name text box. The following asset information is offered for each asset in the list:

   - **Selection box** - Click on the selection box in this column that corresponds to the asset(s) you wish to designate as the asset related to the asset you are editing. Once you have made your selection, you must click the **Finish** button for your changes to cause the asset relationship to be created for the asset in the asset source.

   - **Asset Type Icon** - This icon shows the asset type in a tool tip.

   - **Asset Name (Version)** - Shows the name and version of an asset and will have an asset link so the asset can be viewed in an Asset Popup window. Click the name link or right mouse click to display a context menu offering the options of **Show in Existing Snapshot Window** or **Show in New Snapshot Window**.

2. **Asset in Progress tab** - Displays a list of assets in progress that meet the criteria established by the configuration of this asset type and/or any criteria established by selection of a filter and/or entry of a search string in the Related Asset Name text box. The following asset information is offered for each asset in the list:

   - **Selection box** - Click on the selection box in this column that corresponds to the asset(s) you wish to designate as the asset related to the asset you are editing. Once you have made your selection, you must click the **Finish** button for your changes to cause the asset relationship to be created for the asset in the asset source.

   - **Asset Type Icon** - This icon shows the asset type in tool tip.

   - **Asset Name (Version)** - Shows the name and version of an asset in progress and will have an asset link so the asset can be viewed in a Asset in Progress Popup window. Click the name link or right mouse click to display a context menu offering the options of **Show in Existing Snapshot Window** or **Show in New Snapshot Window**.

See Buttons at bottom of Add Relationships Popup section below for additional options or to finish your selection. See Asset Popup window for more information about viewing relationship assets.

- ### If **Create a new asset** radio is chosen:

    The Add Relationship popup window changes to allow you to add a new asset if you choose the *Create a new asset* radio. Fill in the required information about the asset and hit the **Finish** button. The **Finish** button will load the new asset into the main content window, fill in the required fields and click the **[Submit]** link when done. The relationship will be created and you will be taken back to the parent asset you were previously editing. See Create an Asset for more information.

    See Buttons at bottom of Add Relationships Popup section below for additional options or to finish your selection.

- ### If **Enter asset information manually** radio is chosen:

    If you choose to enter a related asset's name and version instead of selecting it from your search results, you can enter an asset name and version that refers to an asset that is not currently published in your library. This may be your intent. If you enter the name and version of an asset that is not currently published, the relationship will be recorded, but the link to the related asset will not be live in the related asset section of the asset information page. However, if at any time you republish the asset that owns the relationship when the related asset is available as a published asset in the library, the related asset link will become live.

    Asset Name: Enter the Asset Name you wish to use for this relationship.

    Asset Version: Enter the version of the asset you are creating.

    Add Another Asset button: This button will open another set of Asset Name and Asset Version boxes.

Buttons at bottom of Add Relationships Popup

The bottom of the Add Relationship popup has the following buttons:

Previous button - The Previous button will bring you back to the select a new relationship type popup.

Finish button - Click on this button to save any new relationship or changes to an existing relationship to the asset in the asset source. Relationships that are added to the asset or modified will not appear with the published asset until the asset is published or republished.

- If creating a relationship from the *search for assets* or *enter asset information manually* option, the **Finish** button will create a relationship between the asset in progress and the selected or manually entered asset.
- If choosing the *create a new asset* radio, clicking the **Finish** button will load the new asset into the main content window, fill in the required fields and click the **[Submit]** link when done. The relationship will be created and you will be taken back to the parent asset you were previously editing.

Create New Version button - This button will allow you to create a new version of the selected asset from one of the tabs. First you need to select an asset for the one of the tabs. See Asset Information **[Create New Version]** for more information. Fill in the required information about the asset and click the **[Submit]** link when done. The relationship will be created and you will be taken back to the asset you were previously editing. See Create an Asset for more information.

Create Like button - This button will allow you to create a like version of the selected asset from one of the tabs. First you need to click on the selection box in the search column that corresponds to the asset you wish to create a like version. See Asset Information **[Create Like]** for more information. Fill in the required information about the asset and click the **[Submit]** link when done. The relationship will be created and you will be taken back to the asset you were previously editing. See Create an Asset for more information.

Cancel button - Click the button to close the Add Relationships Popup without saving the changes you've made.

Note: the **[Save]** link at the top of the page will display the unsaved changes icon when you add a relationship. The relationship additions, if saved, will not appear in the published asset until you **[Submit]** them for republish.

Context-enabled Relationships

Some relationship may include contextual information. These are called "context-enabled" relationships and are primarily used when a consumption relationship is established between two assets. A context enabled relationship is unique in that it provides additional icons with information about the acquisition (for example) and relationship properties. See Acquisition Status Icon and Relationship Status Icon for more information about relationship icons.

If your library is configured to support asset-based acquisition, each acquiring asset will contain an entry representing the acquisition relationship with the asset that is acquired (or has been requested for acquisition). These relationships are created automatically as a result of requesting the acquisition of an asset for your active asset. Relationships representing asset acquisitions are of a special type called context-enabled relationships. Acquisition relationships include the relationship name and a link to the related asset like standard asset relationships. However, they also include:

- Acquisition Status Icon - which provides the approval status of the acquisition request. Approval status may be *Pending* or *Approved*. The status provides a link to the Request Detail page of the acquisition request.
- Relationship Status Icon - which states whether or not the acquired asset is currently registered to the acquiring asset. Registration status may be *Registered* or *Revoked*. The registration status provides a link to the Context page corresponding to the acquisition request.

When asset-based asset registrations are revoked, the acquisition relationship remains in the acquiring asset with a *Revoked* registration status. If desired, you can remove the asset acquisition relationship on the relationship edit page.

Relationships used for acquisition are defined as context-enabled in your library's Global Definition Template. See your Library Administrator for more information.

View Changes

Two types of relationships offer you the ability to view a comparison of asset information between the asset in progress you are viewing and a related asset in progress. These relationship types are "Predecessor" and "Successor". In cases where there is more than one version of an asset in progress, the asset information for each version will contain links to either a related predecessor, a related successor or both in the Relationship section. Clicking on the **[View Changes]** link corresponding to a predecessor or successor asset in progress will open a browser window showing asset differences. Additions, modifications or removals of asset metadata are displayed in sections corresponding to metadata types: identifier, artifacts, relationships and classifiers. Asset information that has not changed is not included in the differences window, though it remains displayed in the original browser window. User-defined metadata changes are not shown as differences.

In some cases when by-value artifacts are modified, asset differences information will include a **[File Differences]** link. File difference links are available where your library configuration supports the comparison of the artifact type. For example, file difference links may be available when the mime type of the modified artifact is either XML or a type corresponding to an artifact comparator defined in your library's configuration. File difference links, if available, are provided for changed artifacts in the Artifacts > Modified section. They enable you to display specific file differences in addition to the "old value" and "new value" file links. See your Library Administrator for more information about your library's configuration for displaying changes to asset artifacts.

Determining which relationship types are offered and in what order

The types of relationships available to be included with the asset are either listed in this section or are available from the drop down list by using the **green +** icon or by right mouse click to display a context menu offering the option of **Add** on the relationship type title line. Whether or not a relationship type appears in this section or in the drop down list is determined initially by its definition in the asset's capture template. A relationship type will be listed on the Editing Asset Relationship section if:

- The capture template specifies its inclusion. See the Configuration Designer Capture Template Editor for more information about *Always insert this relationship into the asset editor if not yet specified*.
- It has been assigned a value. Relationships that have a value entered for the asset will appear on the Edit Relationships section.
- The capture template designates that a value is required for this relationship type. See the Configuration Designer Capture Template Editor for more information about the *Minimum occurrences* setting.

The order of the relationships included on the Edit Relationships section is alphabetic by default. However, relationship display order can be designated explicitly through use of metadata view configuration. See the documentation provided with Akana Configuration Designer for more information.

Read-only Relationship Values

The Relationships section may include some relationships that are "read only." Read only relationships are provided for the purpose of displaying values to the Asset Capture Engineer, though the values are not available for edit. Read-only relationships values are created and edited by users who are assigned the Usage Controller role in addition to the Asset Capture Engineer role for the asset.

User Defined Relationships

User Defined relationships allow you to add information to an asset that is not predefined in your library's configuration. While providing flexibility, this type of relationship is not searchable and will not be included in asset comparison operations. You cannot add a description to user defined relationships, so the name you provide for the item should make its purpose clear.

Add Relationship

This dialog allows you to enter information about a new asset relationship. Begin by selecting the asset(s) that will be referenced by this relationship. Depending on the type of relationship you are acquiring, and your library configuration, the following options can be used to locate assets:

1. **Search for assets(s)** - This option allows you to search for published or assets in progress. See If Search for asset(s) radio is chosen below for more information.
2. **Create a new asset** - This option allows you to create a new version of an asset without having to leave the edit process. The popup will change to allow you to add a new asset. The asset type will come defaulted to the relationship type you selected. See If Create a new asset radio is chosen below.
3. **Enter asset information manually** - This option allows you to enter a related asset's name and version. See If Enter asset information manually radio is chosen below for more information.

- ## If Search for asset(s) radio is chosen:
  - **Search for:** - This search box allows you to further narrow your search results by putting in a search string that refers to the asset your looking for. Example would be to add the word **web*** to the search box to find all assets with the word web in the content. Click the **?** icon for further examples. The relationship type you are working with may be configured to filter the assets shown initially in your result set. See your Library Administrator for more information about filters.
  - **Search button** - Clicking the search button causes the system to use the search string entered in the **Search for:** text box (if any) and the criteria specified by the filter from the Global Definition Template and Asset Capture Template and present the results in the tabbed results section. Clicking the **Search** button without criteria in **Search for:** box has no effect on the tabbed result list. Clicking on the **Search** button when both offer criteria requires matching assets to match both sets of criteria to be included in the results. See **Tabs** below for the next steps in choosing an asset.

    Note: the assets included in your initial Search Results (prior to applying a filter) may be all published assets available or may represent a subset of published assets that meet criteria established for the type of relationship you are creating. For more information on establishing a filtered set of assets to be available for a relationship type, please see Global Definition Template and Asset Capture Template.

    ### Tabs

    After performing a search you can pick one or more assets, if the relationship type allow multiple relationships, by selecting a check box from the search results from one or both of these tabs:

    1. **Published Asset tab -** Displays a published list of assets that meet the criteria established by the configuration of this asset type and/or any criteria established by selection of a filter and/or entry of a search string in the Related Asset Name text box. The following asset information is offered for each asset in the list:
       - **Selection box** - Click on the selection box in this column that corresponds to the asset(s) you wish to designate as the asset related to the asset you are editing. Once you have made your selection, you must click the **Finish** button for your changes to cause the asset relationship to be created for

the asset in the asset source.

- **Asset Type Icon** - This icon shows the asset type in a tool tip.
- **Asset Name (Version)** - Shows the name and version of an asset and will have an asset link so the asset can be viewed in an Asset Popup window. Click the name link or right mouse click to display a context menu offering the options of **Show in Existing Snapshot Window** or **Show in New Snapshot Window**.

2. **Asset in Progress tab** - Displays a list of assets in progress that meet the criteria established by the configuration of this asset type and/or any criteria established by selection of a filter and/or entry of a search string in the Related Asset Name text box. The following asset information is offered for each asset in the list:

   - **Selection box** - Click on the selection box in this column that corresponds to the asset(s) you wish to designate as the asset related to the asset you are editing. Once you have made your selection, you must click the **Finish** button for your changes to cause the asset relationship to be created for the asset in the asset source.
   - **Asset Type Icon** - This icon shows the asset type in tool tip.
   - **Asset Name (Version)** - Shows the name and version of an asset in progress and will have an asset link so the asset can be viewed in a Asset in Progress Popup window . Click the name link or right mouse click to display a context menu offering the options of **Show in Existing Snapshot Window** or **Show in New Snapshot Window**.

See Buttons at bottom of Add Relationships Popup section below for additional options or to finish your selection. See Asset Popup window for more information about viewing relationship assets.

- If **Create a new asset** radio is chosen:

The Add Relationship popup window changes to allow you to add a new asset if you choose the *Create a new asset* radio. Fill in the required information about the asset and hit the **Finish** button. The **Finish** button will load the new asset into the main content window, fill in the required fields and click the **[Submit]** link when done. The relationship will be created and you will be taken back to the parent asset you were previously editing. See Create an Asset for more information.

See Buttons at bottom of Add Relationships Popup section below for additional options or to finish your selection.

- If **Enter asset information manually** radio is chosen:

If you choose to enter a related asset's name and version instead of selecting it from your search results, you can enter an asset name and version that refers to an asset that is not currently published in your library. This may be your intent. If you enter the name and version of an asset that is not currently published, the relationship will be recorded, but the link to the related asset will not be live in the related asset section of the asset information page. However, if at any time you republish the asset that owns the relationship when the related asset is available as a published asset in the library, the related asset link will become live.

Asset Name: Enter the Asset Name you wish to use for this relationship.

Asset Version: Enter the version of the asset you are creating.

Add Another Asset button: This button will open another set of Asset Name and Asset Version boxes.

Buttons at bottom of Add Relationships Popup

The bottom of the Add Relationship popup has the following buttons:

Previous button - The Previous button will bring you back to the select a new relationship type popup.

Finish button - Click on this button to save any new relationship or changes to an existing relationship to the asset in the asset source. Relationships that are added to the asset or modified will not appear with the published asset until the asset is published or republished.

- If creating a relationship from the *search for assets* or *enter asset information manually*, the **Finish** button will create a relationship between the asset in progress and the selected or manually entered asset.
- If choosing the *create a new asset* radio, clicking the **Finish** button will load the new asset into the main content window, fill in the required fields and click the **[Submit]** link when done. The relationship will be created and you will be taken back to the parent asset you were previously editing.

Create New Version button - This button will allow you to create a new version of the selected asset from one of the tabs. First you need to select an asset for the one of the tabs. See Asset Information **[Create New Version]** for more information. Fill in the required information about the asset and click the **[Submit]** link when done. The relationship will be created and you will be taken back to the asset you were previously editing. See Create an Asset for more information.

Create Like button - This button will allow you to create a like version of the selected asset from one of the tabs. First you need to click on the selection box in the search column that corresponds to the asset you wish to create a like version. See Asset Information **[Create Like]** for more information. Fill in the required information about the asset and click the **[Submit]** link when done. The relationship will be created and you will be taken back to the asset you were previously editing. See Create an Asset for more information.

Cancel button - Click the button to close the Add Relationships Popup without saving the changes you've made.

Note: the **[Save]** link at the top of the page will display the unsaved changes icon when you add a relationship. The relationship additions, if saved, will not appear in the published asset until you **[Submit]** them for republish.

Edit Asset Classifiers

This section allows you to make changes to the classifier values defined for your asset. In addition, an asset may contain some classifiers that are presented as read-only. Read only classifiers do not allow edit except by users that have the Usage Controller role in addition to the Asset Capture Engineer role.

From this page you can:

> View the current asset validation for the classifiers section and edit, add and remove classifiers to the asset in progress.

Click on the following topics to learn more about the information provided on this page:

Working with Asset Classifiers

The names and values for the asset's current classifiers are displayed in this section. The classifiers for an asset are the searchable attributes of the asset. Classifiers that are required are determined by the capture template associated with the asset. Additional classifiers may be included as well. Validation status will show an error until all required classifiers are added, as specified in the asset template.

Classifiers Asset Validation

Asset validation is performed on the asset you are editing. Validation results for asset classifiers are displayed as a status icon next to each deficient classifier and at the top of the Classifiers section with a tool tip. See asset status icon for information about the types of asset validation performed and when each type is performed.

When classifier validation results in anything short of a fully successful validation, the details are presented in the tool tip associated with the asset's classifier validation icon. In addition, any messages produced that pertain to a particular classifier included in the asset are also presented next to the individual classifier.

Edit, Add and Remove Classifier Options

- **Edit** - an existing classifier field by right mouse click to display a context menu offering the option of **Edit** or double clicking on the value column and if the field can be edited the box will change to an editable entry box with the text highlighted or a dropdown box or a popup window will appear for that classifier metadata type.

- **Add** - a classifier field that isn't displayed on the asset in progress page, go to the Classifiers title row, right mouse click to display a context menu offering the option of **Add** or go to the green + icon in the Attributes section and select a classifier name label from the dropdown list. Unless constrained by the asset's template, you can add more than one value for each classifier type defined for your asset.

- **Remove** - an existing classifier by right mouse click to display a context menu offering the option of **Remove** on the classifier or by highlighting the row and clicking on the red - icon in the

Attributes section. Your classifier type and value widgets may differ according to the definition of the classifier in the asset's template. For example:

- Values provided for read-only classifiers cannot be removed, except by users who are assigned the Usage Controller role in addition to Asset Capture Engineer.
- If a value is required for a classifier type, remove will not be available unless you have entered more than the required number of values for that type.
- If only one value is allowed for a required classifier type, clicking **Remove** will open a tool tip noting that the classifier can not be removed. The classifier type can only be edited.

Right Mouse Options context menu

- **Edit** - will open the selected classifier value for edit.
- **Add** - will allow you to add new classifier or add additional metadata to the highlighted classifier.
- **Remove** - will remove the highlighted classifier value.

Note: some right mouse options may not be available depending on the configuration of your library.

Classifier Type Controls

The classifiers that are currently included with the asset are listed to the right of the corresponding classifier type. Their values can be edited or removed by doing a right mouse or double clicking on the classifier value (unless the classifier is designated as read-only) enabling you to modify or delete the classifier from the asset.

Classifier types that are not yet included for the asset or for which the template allows additional instances can be added by right mouse click to display a context menu offering the option of **Add** for the classifier type. You can also add a classifier by going to the green + icon in the Attributes section and select a classifier name label from the dropdown lists. Click on either of these to add a classifier of the corresponding type to your asset.

The actual controls displayed for each classifier type will vary based on the definition of the classifier type in the corresponding template configuration. See Capture Template for more information about classifier type definition. For example:

- If a classifier type is defined to have a *date* value, the control will offer you a calendar widget.
- Classifier types that are constrained to a designated list of values will offer a control that limits input to these values.
- Classifier types that offer a list of values, but also allow user input values will have a control that enables both.
- Classifiers types that are constrained to a specified number of instances will only offer the **Add** button until the limit of instances allowed for the asset is reached.
- Format instructions accompany the text box for *decimal* type classifiers.

See Capture Template for more information about classifier type definition.

Working with Compound Classifiers

If you add a classifier type that is defined as compound, you will notice that the accompanying widgets accommodate multiple related classifier fields. When you are working with a compound classifier:

- The classifier can be defined as required or optional as a whole.
- You are not required to enter values for all fields of a compound classifier. If necessary, you can leave trailing fields blank. However, when you do this, the classifier's value will only be considered a match for a search criteria value that leaves the same fields as unspecified. In other words, leaving trailing fields unspecified in a compound classifier does not result in the unspecified values as being "any" value. Rather, the value is unspecified and will match only to search criteria that

are also unspecified.

- Each field within the compound classifier is affected individually by whether or not a value list is provided in designating the field value and further whether or not you are allowed to enter a value outside of a provided list.

Determining which classifier types are offered and in what order

The types of classifiers available to be included with the asset are either listed in this section or are available from the drop down list by using the **green +** icon or by right mouse click to display a context menu offering the option of **Add** on the classifiers title line. Whether or not a classifier type appears in this section or in the drop down list is determined initially by its definition in the asset's capture template. A classifier type will be listed on the Editing Asset classifiers section if:

- The capture template specifies its inclusion. See the Configuration Designer Capture Template Editor for more information about *Always insert this relationship into the asset editor if not yet specified*.
- It has been assigned a value. Classifiers that have a value entered for the asset will appear on the Edit Classifiers section.
- The capture template designates that a value is required for this classifier type. See the Configuration Designer Capture Template Editor for more information about the *Minimum occurrences* setting.

The order of the classifiers included on the Edit Classifiers section is alphabetic by default. However, classifier display order can be designated explicitly through use of metadata view configuration. See the documentation provided with Akana Configuration Designer for more information.

Read-only Classifier Values

The Classifiers section may include some classifiers that are "read only." Read only classifiers are provided for the purpose of displaying values to the Asset Capture Engineer, though the values are not available for edit. Read-only classifier values are created and edited by users who are assigned the Usage Controller role in addition to the Asset Capture Engineer role for the asset.

User Defined Classifiers

User Defined classifiers allow you to add information to an asset that is not predefined in your library's configuration. While providing flexibility, this type of classifier is not searchable and will not be included in asset comparison operations. You cannot add a description to user defined classifiers, so the name you provide for the item should make its purpose clear. User Defined classifiers are always defined as a String type.

About Asset Submission for Publish

When an Asset Capture Engineer determines that an asset in progress has reached the point where it is ready to be made accessible to asset users, he or she will click on the **Submit** link/icon. The action to request the publish of the asset creates an "asset submission request." The submission of an asset for publish triggers any asset validation established for the asset beyond its asset capture template. In addition, asset submission may trigger pre-governance, governance and/or post-governance processing depending on your library's asset submission process configuration.

- assets that are not published exist only in your library's asset source. Unpublished assets are accessible only to users assigned the Asset Capture Engineer role for the asset's owning group (or a group above it in the library group hierarchy).
- assets that are published exist both as an asset-in-progress in your library's asset source and as a published asset. Published assets can be found by using standard methods to search the library and are available for asset acquisition.
- Assets in progress become available for submission to publish once they meet the metadata constraints imposed by their associated capture template. Upon submission, further validation may be performed depending on the validation process in place for the asset. See your Library Administrator for more information about the asset validation configuration of your library.

Assets are Owned by a Group

Each asset in progress is owned by a group within your library's group hierarchy. When an asset is submitted for publish, any governance process applied will rely on the users assigned the applicable approval roles for the assets owning group or the groups above it in the library's group hierarchy.

Asset Submission Process Governance

Your library process configuration may have established a governance process for the submission of assets for publish. This process may vary by asset type or other asset classifications. If asset submission process governance is in place for an asset, a submission request will be created and pending request notification will be sent to user's with the appropriate approval roles when submission is requested.

Asset Submission Approval Status

The asset submission status is displayed with the asset in progress listed on the pages accessible from the Assets in Progress item in the left navigation bar or Production folders. In addition, if you are the submitter of the request to publish an asset, you have access to the submission request and its updated information from your **My Requests** list available from the left navigation bar or the My Requests view.

Once all necessary approvals are received, the asset becomes available as a published asset in the library.

Submit Asset for Publish

As an Asset Capture Engineer, you can click on the **[Submit]** link at the top of an Edit Asset page once an asset in progress is ready to be published to the library. The results of taking this action is determined by your library's configuration regarding the submission of an asset for publish.

Asset Validation

Assets in progress are validated during the entry or edit of their information in the asset source. In addition, your library may be configured to provide additional validation upon the submission of the asset for publish.

- **template validation** - The capture template associated with an asset prescribes the metadata constraints the asset must meet in order to be published. The metadata for an asset in progress is validated against the capture template each time the edit page for a category of asset metadata (such as artifacts, classifiers or asset relationships) is saved. The completeness of each metadata category is noted in the header of each section of the Edit Asset page as well as the overall header for the asset in progress. If an asset in progress fails to meet the constraints of its capture template, messages to this effect are displayed on the asset edit pages and the asset cannot be successfully submitted for publish.
- **external validation** - If your library provides additional asset validation via external validation, an asset may be further tested upon its submission for publish. The results of this type of validation are also included on the asset edit page. In some cases, reports resulting from validation testing may also be added to the metadata of the asset. There are four possible outcomes for external validation. Assets that fail validation do not result in a continuance of the asset submission process. However, asset that validate with warnings and/or overrides may be submitted at the discretion of the Asset Capture Engineer.
  - validation errors exist and possibly warnings and overrides also- asset submission is aborted and validation results are displayed on the asset edit pages.
  - validation warnings exist and possibly overrides also - asset may be submitted for publish at the discretion of the Asset Capture Engineer.
  - validation overrides exist - asset may be submitted for publish at the discretion of the Asset Capture Engineer.
  - no validation errors, warnings or overrides exist - asset may be submitted for publish at the discretion of the Asset Capture Engineer.

Publication Notes

As submitter of the asset for publish or republish, you may have the option to add a publication note, depending on your library configuration. Submitting an asset for publish may result in the display of a page enabling you to add a note regarding the asset you are submitting for initial publish or on the changes you are submitting for an asset that has been previously published.

- If your library is configured to suppress the publication note, the publication note page will not be displayed.
- Entry of a publication note is optional, even if the submission note page is displayed.
- If you enter a submission note with the initial publish of an asset, the content of the note will be added to the Publication Notes topic of the asset's discussion forum
- If you enter a submission note on a subsequent publish of the asset, the content of the note will be included in the email notification sent to asset subscribers as well as being added to the Publication Notes topic of the asset's discussion forum.
- Whether or not you choose to add a publication note, clicking on **Save** results in a continuation of the asset submission process.

- If publication notes are suppressed for your library, continue with a description of the submission process in the next section of this document.

Asset Submission Request popup

The results of clicking **Save** on the Publication Note page (or in the absence of the Publication Note page, the results of clicking **[Submit]** on the Edit Asset page for an asset that passes any necessary validation) is determined by the asset submission governance in place for the asset submitted. In some cases, the Asset Submission Request Detail popup is displayed. In other cases, the asset is published immediately, without the creation of a request for approval. For example:

- If your library has an established asset submission governance process that applies to this asset:
  - the asset submission request popup may be displayed providing you (as asset submitter) with the opportunity or requirement to add comments and/or additional information to your request. See Asset Submission Request detail popup for more information.
  - the Asset Submission popup may be suppressed for the asset submitter if there is no further information expected to be gathered from you for the request.
  - the asset submission request popup is available to all users who are potentially involved in submitting, reviewing and approving or rejecting the submission request. These users will receive an email notice and a pending request with links to the request detail page.
- If your library configuration does not include an asset submission governance process for the asset submitted, your asset may be published automatically according to its corresponding asset publish template. In this case, the asset submission request popup is not created.

Asset Submission Request

When your library is configured to require approval prior to the publish of an asset, an asset submission request is created when the asset is submitted for publish. See Asset Submission Request detail popup for more information.

Regardless of whether the submission request is presented to the asset submitter (as described in the previous section), the request is routed to the users who hold the approval roles specified in the library's asset submission process configuration. These users receive both email notification and a pending request at appropriate times in the approval and review cycle established for this asset submission.

The original submitter of the request (the submitting Asset Capture Engineer) is informed by email of the actions taken and can also view the submission request detail popup by selecting the request from their My Requests list.

Depending on the specific configuration of your library's asset submission governance process:

- There may be multiple steps included for the approval process.
- Multiple approval roles may be involved and the approvals may be required to take place in sequential order or in parallel.
- Each approver will receive notification and access to the request detail page at appropriate times of the approval cycle.
- In cases where multiple users share responsibility for approving a step in the process, only one individual needs to take action.

Each user taking action on a request will have the opportunity, and in some cases the obligation, to add information to the request in the form of property information.

If and when the request becomes fully approved, the asset is published into the library according to its corresponding publish template. If the request is rejected by any of the approvers, the asset fails to publish yet remains as an asset in progress retaining the asset metadata in place upon submission. The asset submitter is informed of either outcome.

See Asset Submission Request detail popup for more information on the request triggered by the submission of an asset for publish. Please see your Library Administrator for more information about your library's asset submission process configuration.

About Asset Deletion

When an Asset Capture Engineer determines that an asset should be removed from the library, he or she will click on the **Delete** link/icon. The action to request the deletion of the asset creates an "asset deletion request." The request to delete an asset may trigger pre-governance, governance and/or post-governance processing depending on your library's asset deletion process configuration.

- Unpublished assets exist only as assets in progress in your library's asset source. Published assets exist both as assets in the asset source and are also available to Asset Users using standard library searches. Deleting an asset removes it from the asset source and also from the library if it had been published.
- An alternative to deleting an asset is to manage asset availability through use of an asset filter and corresponding asset classifier values. For example, your Library Administrator can configure your library to filter out assets that are deprecated, retired or withdrawn so that they are unavailable to the searches of asset users unless specifically requested. If this method of logically removing asset availability is used, an asset classifier is simply updated to indicate its change of status. Logically changing the availability status of an asset is often more desirable than physically removing the asset so that the asset history and the history of asset registrations to projects and assets is preserved.

Assets are Owned by a Group

Each asset in progress is owned by a group within your library's group hierarchy. When an asset is requested for deletion, any governance process applied will rely on the users assigned the applicable approval roles for the assets owning group or the groups above it in the library's group hierarchy.

Asset Deletion Process Governance

Your library process configuration may have established a governance process for the deletion of assets. This process may vary by asset type or other asset classifications. If asset deletion process governance is in place for an asset, a deletion request will be created and pending request notification will be sent to user's with the appropriate approval roles when deletion is requested.

Asset Deletion Approval Status

The asset deletion status is displayed on the deletion request detail page. If you are the submitter of the request to delete an asset, you have access to the deletion request and its updated information from your **My Requests** list available from the left navigation bar or the My Requests view.

Once all necessary approvals are received, the asset is removed as a published asset in the library and is removed from the asset source.

Delete Asset

As an Asset Capture Engineer , you can click on the **[Delete]** link available at the top of your Edit Asset page in order to request the removal of the asset from your library. The results of taking this action is determined by your library's configuration regarding the request for asset deletion.

Asset Deletion Request popup

The results of clicking **[Delete]** on the Edit Asset page is determined by the asset deletion governance in place for the associated asset. In some cases, the Asset Deletion Request Detail popup is displayed. In other cases, the asset is deleted immediately upon confirmation of the deletion by the Asset Capture Engineer, without the creation of a request for approval. For example:

- If your library has an established asset deletion governance process that applies to this asset:
  - the asset deletion request popup may be displayed providing you (as deletion requester) with the opportunity or requirement to add comments and/or additional information to your request. See Asset Deletion Request detail popup for more information.
  - the asset deletion request popup may be suppressed for the asset deletion requester if there is no further information expected to be gathered from you for the request.
  - the asset deletion request popup is available to all users who are potentially involved in submitting, reviewing and approving or rejecting the submission request. These users will receive an email notice and a pending request with links to the request detail popup.
- If your library configuration does not include an asset deletion governance process for the associated asset, your asset may be deleted immediately upon your confirmation that you want to proceed with the delete action. In this case, the asset deletion request popup is not created.

Asset Deletion Request

When your library is configured to require approval prior to the deletion of an asset, an asset deletion request is created when an Asset Capture Engineer clicks on the **[Delete]** link on the Edit Asset page. See Asset Deletion Request detail popup for more information.

Regardless of whether the deletion request is presented to the deletion requester (as described in the previous section), the request is routed to the users who hold the approval roles specified in the library's asset deletion process configuration. These users receive both email notification and a pending request at appropriate times in the approval and review cycle established for this asset deletion request.

The original submitter of the request (the Asset Capture Engineer requesting deletion) is informed by email of the actions taken and can also view the deletion request detail popup by selecting the request from their My Requests list.

Depending on the specific configuration of your library's asset deletion governance process:

- There may be multiple steps included for the approval process.
- Multiple approval roles may be involved and the approvals may be required to take place in sequential order or in parallel.
- Each approver will receive notification and access to the request detail popup at appropriate times of the approval cycle.
- In cases where multiple users share responsibility for approving a step in the process, only one individual needs to take action.

Each user taking action on a request will have the opportunity, and in some cases the obligation, to add information to the request in the form of property information.

If and when the request becomes fully approved, the asset is removed as a publish asset from the library (if applicable) and is also removed as an asset in progress from the asset source. If the request is rejected by any of the approvers, the asset remains as a published asset and as an asset in progress. The deletion requester is informed of either outcome.

See Asset Deletion Request detail popup for more information on the request triggered by the request to delete an asset. Please see your Library Administrator for more information about your library's asset deletion process configuration.

Email Artifacts

Your library may be configured to support email artifacts. This type of artifact behaves differently from other artifact types. The following considerations should be noted when using email artifacts:

Initialization by ACE

When an Asset Capture Engineer (ACE) adds an email artifact to an asset, the Edit Artifact dialog displays the artifact with a text description, and the artifact is considered uninitialized and not yet ready for use. Once the artifact is saved, the value changes from a text description to a file containing a link, and the artifact is then ready to be used for email discussions.

First use

After an email artifact has been initialized for use, an email discussion can be started. Click on the artifact link, and you will be directed to a web page containing a link to start a discussion. Clicking on the "start a discussion" link brings up a new email message. From here you can add recipients, add email contents, and send the email when you are ready. Once the new email is sent and the artifact update takes place (see Delayed updates, below), the artifact value is replaced with a file called "message.eml." Clicking on message.eml brings up the email message in your email application.

Delayed updates

Email artifacts require background processing by the Akana application. This background processing checks for email artifact updates on a scheduled interval, configured by your Library Administrator. After sending a new email or replying to an existing email artifact, a delay may be seen before the new or updated email artifact is reflected in the asset.

Email artifact values

When viewing or editing an asset in progress, email artifacts are shown as *Email*. Once the asset is published, the artifact value reflects its current state:

- *send.eml* indicates an email discussion has not yet been started
- *message.eml* indicates an email has been sent and the asset was updated to reflect the new or updated artifact

Email Subject and addressee list

Because of how email artifacts are processed, the following guidelines must be followed:

1. Each email artifact message *Subject* identifies the enclosing artifact by encapsulating library and artifact information inside of [...] brackets, for example:

   ```
   RE: MyApplication (1) [SOA:11:119:1]
   ```

   In order for emails to be reflected in the asset artifact, you must not modify the information enclosed in brackets.

2. Email artifact processing involves use of a special email account which monitors email messages and performs artifact updates. This special email account is included in the "copy to" list of new email artifacts. This email account must be copied on all subsequent email updates, or the artifact will not reflect the changes. Note that using an email "forward" or "reply" instead of "reply all" may inadvertently cause this account to be removed from the email "copy to" notification list, so using "reply all" is generally recommended.

Publish Assets

Asset Capture Engineers create and modify assets as assets in progress in your library's asset source. When an Asset Capture Engineer determines that an asset is ready to publish or republish, he or she submits the asset. The submission of an asset triggers the asset submission governance in place for the asset, according to your library's asset submission governance process configuration. Once an asset submission receives full approval, the asset is published to the library according to the publish template applicable to the asset's owning group for the asset type. See Asset Editing for more information

If you have a role that is involved in asset submission governance or asset publish, you will receive email notification at the appropriate time within the process. In addition to the email notification, you will get a pending request added to your Pending Request list. Display your pending requests list by clicking on the **Pending Requests** item in your left navigation bar. This list will display requests related to the responsibilities of asset production governance or asset publish. See Working with Requests for more information.

Publish Process

A Usage Controller for your library configures the publish process for assets by associating the appropriate publish template(s) with each group that owns assets. As needed, the Usage Controller may associate publish templates for the group with specific asset types as well. Each group in your library group hierarchy can have one or more publish templates associated with it:

- A group may or may not have a publish template associated with it. If the group owns assets and does not have an associated publish template, the system relies on an inherited template to govern the publish of its assets.
- If a group has a publish template associated as a *default* publish template, the publish of its assets will be governed by this template only if a publish template specific to the asset type is not found in the group's inheritance chain.
- If a group has a publish template available specifically for the type of asset being published, this template will be used to govern the publish of the asset.

Publish Template Usage

The publish template used for an asset's publish and subsequent republish is determined by the owning group of the asset and in some cases also by the asset's type as discussed in the previous section. Here is the process used to determine which template to apply to the publish of an asset owned by the group:

1. The system looks at the templates available for the owning group of the asset. If there is a type-specific template available, it is used for the publish.
2. If a type-specific publish template is not found for the asset's owning group, the system looks in turn at each parent group in the owning group's hierarchy for a type-specific template. If found, this type-specific publish template is used for the publish.
3. If a type-specific publish template is not found in the owning group's inheritance chain, the system returns to the owning group and looks for a default publish template. If a default publish template is found, it is used for the publish.
4. If a default publish template is not found in the owning group, the system looks in turn at each parent group in the owning group's hierarchy for a default publish template. If a default publish template is found associated with a group in the inheritance chain, it is used for the publish. In most cases, the default template provided with your initial library configuration is encountered as associated with the Enterprise group if no other default publish templates are found.
5. If a default publish template is not found in the parent groups, the publish of the asset takes place as a manual publish. In the case of a manual publish, a publication request is added to the responsible publishers' publication Pending Request list. This step is rarely used by the system due to the default publish template provided and associated with your library's enterprise group in your library's default configuration.

Publish Templates

The publish template feature of your library allows you to control the method of asset publish and republish. The template can also provide additional information for published assets, such as the designation of which asset artifacts are private and which asset views will include the asset. This additional information is called asset *publish information* and is separate from the asset metadata.

Once the submission of an asset for publish has received full approval, a publish template is used to control the actual publish of an asset. Assets are published using the publish template for their owning group (or a parent of their owning group). The publish template used may or may not be specific to the type of asset published. Alternatively, publish templates can be provided to a script using Akana™ Automation Extensions or Application Programming Interfaces (APIs) for your application.

A default publish template is provided in your library configuration. See the Default Library Configuration information provided in your web browser help system for more information. The use of additional publish templates is optional. Please see About Publishing Assets for more information on the use of publish templates.

Publish Template Content

You can use a publish template to specify various information and parameter values for the asset being published, such as:

- asset publish method (manual or automatic)
- asset republish method (manual or automatic)
- contact names and information (Note: depending on your library configuration at least one contact may be required; you can specify multiple contacts)
- specification of asset group ownership (Note: this is used only in the case where an automated script is used to publish assets. In this case, the owning group specified is used to override asset group ownership assignment)
- notify owner of asset usage setting
- owner authorization required setting
- default cross-charge amount
- asset-specific forum topics
- asset view(s) in which to include a reference to the asset
- designation of whether or not to remove the asset from asset views not included in the publish template
- designation of individual asset artifacts as private (identifies the specific artifacts that cannot be viewed or downloaded until the asset is registered to the user's project)
- designation of artifact categories as private (identifies the artifact categories where all artifacts of this category are designated as private and cannot be viewed or downloaded until the asset is registered to the user's project).

Publish Template Usage

Publish templates are associated with groups defined in your library's group hierarchy by a Usage Controller. In some cases, they are also mapped to specific asset types. When an asset is submitted for publish, the publish is governed by the publish template associated with the asset's owning group for the type of asset. In the case of publishing with an automated script, a publish template may be provided for use in the script's publish process.

For more information on Publish Template assignment, see About Publishing Assets.

Default Publish Template

A default asset publish template is provided for your library upon library creation. In addition to designating automatic publish and republish, the default publish template establishes a set of asset-specific discussion forum topics. See the Default Library Configuration help topic provided in your web browser application help system for more information.

The default publish template is associated with your Enterprise group. If no other publish templates are uploaded and associated with groups, all assets submitted for publish will be published according to the default publish template. If you are a Publisher, you can view the default publishing template and upload customized publish templates to your library by clicking on the **[Manage Publish Templates]** link on your support center page.

Implementing a Custom Publish Template

If you wish to vary the publish parameters to be used for a group of assets from the default publish template provided, you can do so by creating a custom publish template, uploading it to your library and associating it with the appropriate owning group and asset type. This process is carried out by users assigned the Publisher role and users assigned the Usage Controller role.

Publisher

1. Create custom publish template (see below), using the publish template schema and your schema-aware editor to create, review and validate the template. The publish template schema is available from your Manage Publish Templates page.
2. Provide a meaningful template name in the body of the template's XML document. This is the name that will be used to list the template in your library. **Warning:** A template name cannot use **restricted characters,** such as: **\ / * < > , : ? ' $ ~ " |** and **`**. These restricted characters are invalid for template names.
3. Save the template with a meaningful file name.

Usage Controller

1. Each publish template uploaded by a publisher must be associated with one or more groups in order to be used for the publish of assets owned by the group. To do so, display the group edit page by clicking on the **Groups** item from your left navigation bar and selecting a group or project from the resulting list. Note: when choosing where to associate a publish template in your group hierarchy, keep in mind that assets owned by a group without an associated publish template will use the template next available from higher in the group hierarchy. In fact the system will first look for a type-specific template in the owning group, then search the inheritance chain for a type-specific template, before using the first default publish template found. See the publish template section of the Group Detail page or Project Detail page for more information on associating a publish template with a group and specific asset type.

Creating a Custom Publish Template

A publish template is a specifically-structured XML file that the system can parse to control publishing methods, provide asset publish information, designate asset owner reuse setting, etc. The default template that is included for your library will probably be the best starting point for the custom templates you create. If you are a Publisher, you can access a copy of the default publish template from your Manage Publish Templates page.

Publish Templates are created outside your application by using the XML editing tool of your choice. The resulting template file must have an extension of .xml and conform to the strict XML conventions. In order to aid in the creation and validation of the template structure, your application provides a corresponding XML schema. You can access the schema from your Manage Publish Templates page, if you are a Publisher.

The top level (root) element of an XML template is the **<template>** element. The simplest template (an empty template) would be the following:

```
<?xml version="1.0" encoding="UTF-8"?>
<template/>
```

Each of the schema changes is accomplished by specifying and redefining child elements of the **<template>** element.

Here is an example of a custom publish template:

```
<?xml version="1.0" encoding="UTF-8" ?>
<PublishTemplate xmlns:xsi="http://www.w3.org/2000/10/XMLSchema-instance"
  autoPublish="true"
  autoRepublish="true"
  name="Sample Publishing Template"
  description="Used to publish assets owned by Reuse Competency"
  notifyOwnerOfUsage="false"
  ownerAuthorizationRequired="false"
  crossChargeAmount="1000.00"
  <supportAssetViewRemoval="false">
  <artifactVisibility artifactName="artifact1name" publiclyVisible="false"/>
  <artifactVisibility artifactCategory="architecture-document"
publiclyVisible="false"/>
  <forumTopic>Usage Guidelines</forumTopic>
  <assetViewName>Asset View 1</assetViewName>
</PublishTemplate>
```

Explanation of Publish Template child elements

The following table describes the elements shown in the sample publish template above.

Sample Element	Description
autoPublish="true"	Designates that an asset publish submission, once fully approved, will result in the automatic publish of the asset without Publisher involvement.
autoRepublish="true"	Designates that an asset publish submission (for a previously published asset), once fully approved, will result in the automatic publish of the asset without Publisher involvement.
name="Sample Publishing Template"	Identifies the name of the template that will be used in the list of publish templates provided to Publishers and Usage Controllers.
description="Used to publish assets owned by Reuse Competency"	Identifies the description of the template provided to Publishers and Usage Controllers.
notifyOwnerOfUsage="false"	Designates that assets published using this template will not require email notification be sent to the asset owners when a project participant requests the acquisition of the asset for their project.
ownerAuthorizationRequired="false"	Designates that assets published using this template will not require approval by an asset owner when a project participant requests the acquisition of the asset for their project.

crossChargeAmount="1000.00"	A cross charge amount will be associated with each approved reuse of this asset.
supportAssetViewRemoval="false"	A *false* value for this flag indicates that an asset published using this template *will not* be removed from asset views where it is currently included. Conversely, a *true* value for this flag indicates that an asset published using this template *will be* removed from all asset views where it was included prior to publish, except for asset views identified in this publish template. Note: possible confusion can be introduced if asset views are managed both manually and through the use of publish templates. It is recommended that asset views be managed through exclusive use of one method or the other.
artifactVisibility artifactName="artifact1name" publiclyVisible="false"	All artifacts named "artifact1name", if published with an asset, will be listed on the asset information pages, but will not provide a live link to access the artifact to project participants unless and until the asset is registered to the project. By default, the artifact name is the same as the artifact category, but it can be changed in order to differentiate among different instances of an artifact within a category.
artifactVisibility artifactCategory="architecture-document" publiclyVisible="false"	All artifacts within the "architecture-document" category, if published with an asset, will be listed on the asset information pages but will not provide a live link to access the artifact to project participants unless and until the asset is registered to the project. The artifact category generally identifies the purpose of the artifact. Artifacts are grouped for display by category.
<forumTopic>Usage Guidelines</forumTopic>	Creates a forum topic of "Usage Guidelines" in the asset-specific forum of each asset published using this template.
<assetViewName>Asset View 1</assetViewName>	Specifies an asset view where the asset will be added by reference when published. Note: the publish template may designate that the asset will also be removed from any asset views not included as a view where the asset will be added in the publish template. See Support Asset View Removal.

Publish Template Management

This page is used to enable you to view, add, modify or remove publish templates for your library. If you are a Publisher, you can display this page by clicking on the **[Manage Publish Templates]** link in the Asset Publisher Tasks section of your Support Center page.

From this page you can:

- View a list of publish templates that are currently available in your library.
- View the contents of a publish template.
- Remove a publish template from your library.
- Point to and upload a new or replacement publish template file.
- Note: publish templates are not used in asset publish or republish unless they are associated with a group. The association of publish templates to one or more groups is a task performed by a Usage Controller. See the publish template section of the Group detail page or Project detail page for information on associating publish templates.

Publish Template Manager page Content

This page contains the following selections and information:

Current Templates

Click on the drop-down list to display the templates available to your library. If you wish to view, download or remove a template, select its name from the list. Once you select a template name, you have these options:

[Get]

Clicking on this link opens your selected template in a new browser window. You can then view the template and save it using File/Save As from your browser menu. This action will enable you to open the template into the editor of your choice for modification.

[Remove]

Clicking on this button will remove your selected template from your library. Note that this also removes any associations groups and projects have to this template. Asset publish and republish actions will use other templates that are currently in place, or for which you create new associations. See About Publishing Assets for information on publish template usage.

[Get the publish template schema]

Select this link to open the library schema for the selected publish template in a new browser window.

Template file to Upload:

Use this section to designate a template to upload to your library as a publish template. You can select a file name of the template file by clicking on the **Choose File** button to navigate and point to the file. Note: publish templates are not used in asset publish or republish unless they are associated with group or project as either the default or as asset type specific publish templates. The association of publish templates is a task performed by a Usage Controller. See the publish template section of the Group detail page or Project detail page for information on associating publish templates with a group.

Choose File

Click on this button to browse for the template file.

Note: The template name, as designated in the template file, cannot contain the following

reserved characters:
\ / * < > , : ? ` ' $ ~ " |

Upload

Click on this button to cause the file identified in the File to Upload field to be uploaded to the library as a publish template.

Cancel

Click on this button to abort the changes you have made on this page.

Edit Group Templates page

This page enables you to designate a default publish template for your group, and associate a publish template with specific asset types, if desired. The rules for determining which publish template is used when publishing an asset can be complex. For more information, see About Asset Publish Templates and About Publishing Assets.

From this page you can:

- Designate a default asset publish template for your group.
- Associate publish templates with specific types of assets being published.

Edit Group Templates page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Group List

Click on this bread crumb link to display a list of the groups in your library.

Group Detail

Click on this bread crumb link to display the details for your group.

Select the default publish template you wish to use. This template will be used during publication of an asset when there is no specific template associated with the asset type, either in your group or in any of the org groups up the hierarchy chain.

To associate a publish template with particular asset types, click on **Add Mapping** and select the asset type and publishing template to associate with that asset type. Perform this operation as many times as needed to set up the publish template(s) for each of the asset types that you wish to use with particular publish templates.

› Click on the **Save** button to record your changes and return to the Detail page.

› Click on the **Add Mapping** button to associate one or more templates with specific types of assets being published. The Edit Group Templates/Add Mapping page displays, enabling you to associate an asset type with a template.

› Click on the **Cancel** button to return to the Detail page without recording any changes.

Add Asset Contacts

If you are a Publisher, you can add contacts to an asset during the adding or editing of the asset's publish information. In addition, contacts can be associated with an asset through a publish template. See About Publishing Assets for more information on using a publish template to associate contacts with an asset.

If you are a publisher, you can display the Add Asset Contacts page by clicking on the **[Add Contacts]** link on your Edit Publish Information page. The Edit Publish Information page is accessible by selecting an asset from your Publication Requests page or by clicking on the **[Edit Publish Information]** link on a published asset's information page.

This Add Asset Contacts page provides the ability to:

- Display a list of contacts available to your installation.
- Filter the contacts shown by entering a search string with which to match the contact's Email address and/or Full Name.
- Sort the displayed users by contact Email address or Full Name.
- Add the association of one or more contacts to the asset.

Add Asset Contact Content

The Add Contacts page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Asset Publish Information

Click on this bread crumb link to display your Edit Publish Information page.

[Add Selected Contacts]

Click on this link or button to save any changes you have made to add contacts to the asset.

[Cancel]

Click on this link or button to display the Edit Publish Information page, ignoring any changes you had made to add a contact(s).

The following information is displayed for the potential project participants shown:

Asset Contact

Use this column to click on the check box corresponding to a contact you wish to add to the asset you are editing. Note that these changes are only saved if you click on the **[Add Selected Contacts]** or **Save**.

At the top of this column, just below the heading, is the **Run** and **Clear** buttons for your filter. If you designate and apply a filter, you can affect which contacts are displayed in the contact list from which to choose those to associated with the asset you are editing.

Use **Run** to apply a filter you have designated in the text box above the Email and/or Full Name columns. The contacts displayed are those that meet the conditions you've entered for these columns. Note that you can use an ***** as a leading or trailing wildcard for your filter.

Use **Clear** to remove search strings from the text boxes above the Email and/or Full Name columns. If you then click on **Run**, you will display all contacts available to your installation.

Full Name

This column depicts the full name (that is, the first and last name) of a contact. You can click on the heading of this column in order to sort the displayed contacts in ascending order by Full Name. If you click on the column heading a second time, the contacts will be sorted in descending order instead. Clicking a third time removes the sorting for this column.

User Name

This column depicts the login user name. You can click on the heading of this column in order to sort the displayed contacts in ascending order by User Name. If you click on the column heading a second time, the contacts will be sorted in descending order instead. Clicking a third time removes the sorting for this column.

Email

This column displays the email address associated with a contact. You can click on the heading of this column in order to sort the displayed contacts in ascending order by Email address. If you click on the column heading a second time, the contacts will be sorted in descending order instead. Clicking a third time removes the sorting for this column.

Additional levels of sorting

If you click on one column name only, the result is a primary sort. If you wish to add a secondary sort, click on the secondary column name first, then click on the primary sort column name.

Buttons

When you are finished viewing and/or modifying the Add Asset Contact page, you can choose one of the following:

Save

Click on this button to save any changes you have made to add contacts to the asset.

Cancel

Click on this button to display the Edit Publish Information page, ignoring any changes you had made to add a contact(s).

Edit Private Artifacts page

This page allows you to designate which asset artifacts will be marked 'private'. A designation of private means that this artifact on the asset's information page is listed by name, but its information is not made available to the user unless and until the asset has been registered to the user's active project. This designation is used to enforce registration of the asset to a project before artifact information is provided. If an artifact is not designated as private, the artifact information published with the asset is available to any user, whether or not the user's active project has registered the asset.

Artifacts are generally designated as public for one of two reasons:

- Either the artifact information is made available to all users due to its usefulness in understanding the usability of the asset for a specific purpose (and other artifacts of the same asset are marked private to require registration), or
- Your organization chooses not to enforce asset registration for reuse metrics through these means.

Edit Private Artifacts page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Asset Publish Information

Click on this bread crumb link to return to the Asset Publish Information page.

[Select All]

Click on this link to select all of the listed artifacts.

[Save Changes]

Click on this link to save your changes and return to the Asset Publish Information page.

Asset Artifacts

The artifacts associated with this asset are shown.

Name

The name of the artifact.

Reference

The artifact reference.

Description

The description of the artifact.

Check the Select box next to each artifact you wish to mark as private. Clear the check box to mark the artifact as public. When you have finished setting your asset artifact visibility, click on the **[Save Changes]** link to save your changes, or press your browser's back button to return to the previous page without saving your changes.

Edit Asset Publish Information page

This page allows you to change publish information for your asset. You can:

- Select a different owning group for the asset.
- Identify a default cross charge amount to associate with a request to use the asset.

Edit Asset Publish Information page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Asset Publish Information

Click on this bread crumb link to return to the Asset Publish Information page.

Organizational group to own the asset

Select the library group which will be given ownership responsibility for the asset. For example, Asset Capture Engineers assigned to the owning group will see this asset in their Assets In Progress lists, and Publishers responsible for this group will see the **[Edit Publish Information]** link on the asset's information page.

Cross Charge

Enter the amount to be used as a default amount for cross-charge when this asset is registered to a project. Optionally, this amount can be used as information regarding the amount to be credited to the organizational group owning this asset.

Buttons

When you are finished creating or editing your asset publish information, click on the following button of your choice.

Save

Click on this button to save the publish information and return to the previous page.

Clear

Click on this button to remove values from all the fields on this page.

Cancel

Click on this button to return to the previous page without saving any changes.

Manual Asset Publish/Edit Publish Information page

This page displays the publish information associated with an asset. The most common use of this page is to manually edit the asset's publish information. However, this page may also be displayed as a result of an asset being published manually instead of automatically by template. In the case of a manual publish of an asset, this page includes the ability to publish the asset once the publish information has been entered or confirmed.

If you are an Asset Capture Engineer or Publisher responsible for an asset that has already been published to the library, you can use the **[Edit Publish Information]** link available to you on the asset's information page to display the Edit Publish Information page.

If you are a Publisher responding to a request to manually publish the asset, you can display this page by clicking on the **[Details]** link of a publish request on your Pending Requests list page.

From this page you can:

- View and edit the asset's general publish information.
- View and edit the asset's contact information.
- View and edit asset artifacts' designations of private or public availability
- Publish or republish the asset, making it available to library users with applicable updates to the asset publish information.

Manual Asset Publish/Edit Publish Information page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Pending Requests

This bread crumb link is available only if you are viewing this page as a part of a manual publish process. Click on this link to display the Pending Requests List page, which includes and provides access to publication requests for your publisher group(s).

Asset

This bread crumb link is available if you have displayed this page from the **[Edit Publish Information]** link on an asset detail page. Click on this link to return to your asset detail page.

Manual Asset Publish/Edit Publish Information: Asset Name(Version)

Description:

This section displays the asset name and version and description.

Publish information

This section displays the publish information currently in place for this asset or, if this is a first time publish of the asset, this section may have been populated with information provided by the asset's publish template, or it may be empty.

[Edit]

Click on this link to display the Edit Asset Publish Information page.

Asset Contacts

This section displays a list of contacts and corresponding information that currently exist for this asset.

If this is a first time (manual) publish of the asset, this section may be empty or it may have been populated with information provided by the asset's publish template. After the initial publish of the asset, you can maintain the asset's contact information via the **[Edit Publish Information]** link available to you on the published asset information pages or through use of Automation Extensions. See About Publishing Assets for more information.

[Add Contacts]

Click on this link to display the Add Asset Contacts page.

Information displayed for each contact includes:

Asset Contact

This column includes a check box corresponding to each existing contact. Use this column to click on the check box corresponding to a contact you wish to remove from the asset you are publishing. Contacts can be removed in this manner during the initial publish of an asset only. If you are republishing an asset, this check box is grayed out and not accessible except through the **[Edit Publish Information]** link on the asset information pages. Note that these changes are only saved if you click on **Save**. If the contact you are removing is currently the *Primary* contact, you must first select a different primary contact (in the second column). If there are currently no other contacts existing for the asset, you must first add another contact, then designate this contact as the new primary contact before removing the previous primary contact.

Primary Contact

Depending on your library configuration, each asset may or may not require a primary contact. You can change the primary contact for the asset by clicking on the radio button corresponding to the contact you wish to designate as primary. You must then click on **Save**.

Name

This is the Full Name of the contact.

Email

This is the Email address associated with the contact.

Role

This is the name of the role you wish to designate for the contact as it relates to this asset. This field is optional, and is used to display next to the contact on the asset contact list available to the library user.

Description

This is a description for the contact as it relates to this asset. This field is optional, and is used to display next to the contact on the asset contact list available to the library user.

Private Artifacts

This section displays a list of the asset's artifacts along with a designation of whether each artifact is *private* or not. A designation of private means that this artifact on the asset's information page is listed by name but its information is not made available to the user unless and until the asset has been registered to the user's active project. This designation is used to enforce registration of the asset to a project before artifact information is provided. If an artifact is not designated as private, the artifact information published with the asset is available to any user, whether or not the user's active project has registered the asset. Artifacts are generally designated as public for one of two reasons: either the artifact information is made available to all users due to its usefulness in understanding the usability of the asset for a specific purpose (and other artifacts of the same asset are marked private to require registration) or your organization chooses not to enforce asset registration for reuse metrics through these means.

After the initial publish of the asset, you can update the asset artifact's privacy designation via the **[Edit publish information]** link available to you on the published asset information pages or through the use of Automation Extensions. See About Publishing Assets for more information.

[Edit]

Click on this link to display the Edit Private Artifacts page. This page enables you to designate the artifact as public or private.

Publish

This button is available if you have accessed this page as a result of selecting a manual publish request for the publish or republish of this asset. If you have displayed the Edit Publish Information page by selecting the **[Edit Publish Information]** link, the **Publish** button is not available.

Click on this button to publish the asset (for either an initial manual publish or a manual republish) once you have completed the entry or edit of the asset's publish, contact and artifact designation information. Clicking on this button causes the asset metadata and publish information to be available to library users in a consumable form.

Buttons

When you are finished viewing and/or modifying the Manual Asset Publish/Edit Publish Information page, you can choose one of the following:

Save

If you have displayed this page via the **[Edit publish information]** link available to you on the published asset information pages, you can click on this button to save updates you have made. This action results in asset publish, contact and artifact privacy designation information updates and is independent from republishing asset metadata.

Cancel

Click on this button to abort the changes you have made on this page.

Work With Approval Requests

In the course of viewing and taking action on requests you have generated and requests pending your action, you will use tables of request information. Request information tables are also used by Usage Controllers to manage requests. While the content of the tables will vary with the specific page you are viewing, the manner in which you'll work with request table will be the same. Request tables are provided on many different pages of your application, including:

- My Requests
- My Request History
- Pending Requests
- Pending Request History
- Managing Requests

Request Tables Page Contents

This page contains the following links, information and selections.

Home

Click on this bread crumb link to display your home page.

[Delete Selected Requests]

Click this link to delete selected requests. This link is only offered to you if you are on the Usage Controller's Managing Requests page.

Selection box

Select each request you want to delete and click the **[Delete Selected Requests]** link. This selection box is only offered to you if you are on the Usage Controller's Managing Requests page.

Actions

This column offers:

- the ability to apply or remove a filter to the list of requests displayed. See below for more information on filtering and sorting your requests.
- **[Details]** link to display the detailed information of the request and the activity associated with it.
- **[Delete]** link to enable you to delete the request. This link is only offered to you if you are on the Usage Controller's Managing Requests page.

Type

This column depicts the type of the request. Examples of request types include:

- Asset Acquisition
- Asset Deletion
- Asset Revocation
- Asset Submission

Status

This column depicts the current status of the request, and will reflect the stage of the process this request has reached, according to your library's process configuration for this request type.

Requester

Included only if you are on the Pending Request or Pending Request History page, this column names the user account that generated the request.

Requesting Group

This column depicts the group on whose behalf the request was made. For example, if you requested an asset be acquired for a project you were working in, the Requesting Group would display the name of that project.

Asset Name (Version)

This is name and version of the asset associated with the request. In some cases, the asset name provides a link to the information page of the published asset or the asset edit page of an asset in progress. The pages displayed by these links provide a means to view the changes pending for the asset.

Asset Status

This column depicts the current status of the asset associated with the request.

Date

This is the date and time of your original request.

Filtering

There is a row beneath the request column headings that offers filter widgets in the Type, Status, Requester, Requesting Group, Asset Name (Version) and Asset Status columns. A filter is used to limit or modify which requests are displayed in your list. For example, by selecting a search criteria of *Asset Acquisition* in the Type column, the filter is applied on exit of selection and will only show those requests made on behalf of a Type - *Asset Acquisition*.

Clear Filter

Click on this button to clear all filter boxes.

Sorting

Primary Sort, ascending or descending

If you wish to sort the request rows by a column value, simple click on the column name. An ascending sort is applied (by default). You can switch the sort order to descending by clicking on the column name again. The triangle icon depicts whether the sort order is ascending or descending. Note: only the primary sort key is noted as ascending or descending. In addition, you can also re-arrange the columns by dragging and dropping the column header to a new location in the header row. Use the controls made available by hovering on the column heading and clicking the down arrow at the end of the column header, select sort order from the menu provided. You can also remove a column from the display using this same menu.

See Request Details for information on the various types of requests.

Paginate Controls

In addition to providing the asset information there are additional paginate controls at the bottom of the page:

- Paginates your results. See the controls offered at the bottom of the page to:
    - You can move through the result pages by clicking the **<** or **>** icons as well as entering the page number.

- Click the **Refresh** icon to update your search results.
- Change the number of assets viewed per page by clicking the **Asset per Page:** button.
- View a total count of assets included in the result set, if displayed. Note: see Manage My Account for more information about turning this option on or off.

About Requests

A request is a persisted entity created in your library each time a process is triggered that is associated with enhanced governance requirements. The request is created when the process is triggered in order to solicit approval action from users assigned governance responsibility. Requests enable tracking of the request status and also serve as a means to provide and/or gather information during the request approval process. Information gathered with the request is passed into the request context which enables it to be viewed while the request is active and also when the request approval cycle has concluded.

Request Types

Following is a list of the types of requests that may occur in your library depending on the governance configuration for each of the core processes:

- Asset Submission Requests - these requests are related to the asset production process that may be established in your library for certain categories of assets as they are submitted for publication.
- Asset Deletion Requests - these requests are related to the asset deletion process that may be established in your library for certain categories of assets as they are submitted for deletion.
- Asset Acquisition Requests - these requests are related to the asset acquisition process that may be established in your library for certain categories of assets when the asset is requested for use by your project or your project's asset.
- Asset Acquisition Revocation Requests - these requests are related to process of removing the registration of an asset to your project. The removal of the asset registration is called revocation.

Request Management

In some cases, actions you take result in the creation of a request that is communicated to other users in your library. For example, as an Asset Capture Engineer you may create an asset and submit it for publish. If your library is configured to include a governance process for publishing this asset, your submission results in the creation of a request which is sent to one or more users assigned the role required to approve the publish of the asset. In another example, when you click on the acquire link for an asset you plan to use, if this action requires approval an acquisition request is created and assigned to your project manager or to users with a role required to approve your use of the asset. In both of these examples, you will receive email notification informing you that approval is required. You can use your My Requests list to keep informed as the request is acted upon throughout the governance process.

You may also find that you receive notice of requests requiring your action, depending on the responsibilities associated with your role assignments. The requests you receive are the result of actions taken by other users as they relate to the roles you are assigned. For instance, if you are an Asset Owner you may receive a Pending Request and corresponding email notification when an asset you own is being requested for acquisition by a project participant. Requests are presented to you in your Pending Request list in addition to the email notification you receive.

There are two links on your left navigation bar that provide a means to view the requests you trigger and those pending your action:

- My Requests
- Pending Requests

See Working with Requests for more information.

My Requests

In the course of performing work in the library, you may trigger a work item that requires action be taken by another user. Display a list of your requests that are currently pending action by others by clicking on the **My Requests** item on your left navigation bar. Note: this page includes requests related to asset submission, asset publish, asset deletion, asset acquisition and asset registration revocation.

Specifically, this page provides:

- A displayed list of the requests you have generated that are still active. Note: depending on how many requests you have, this list could be truncated to display the first several, according to the sort that is currently in effect on this information.
- For each request shown, the information displayed includes the type of request, its status, the group on whose behalf the request was made, the name and version of the asset involved and the date and time of the request.
- The capability to apply a filter in order to limit the requests displayed.
- The capability to sort the displayed requests.
- A **[Details]** link for each request to display the request detail page.
- A link to display asset information pages by clicking on the asset name and version link.
- A link to display a list of your requests that have already been acted upon.

My Requests Page Contents

This page contains the following links, information and selections.

Home

Click on this bread crumb link to display your home page.

[My Request History]

Click on this link to display a list of your inactive requests.

My Requests Table

A table of information on your requests that are currently awaiting action by an appropriate user. See Working With Requests for information on working with this table. Also see Request Details for access to information on the different types of requests.

My Request History

In the course of performing work in the library, you may trigger a work item, called a request, that requires action be taken by another user. You can display a history of your requests by clicking on the **[My Request History]** item on your My Requests page. This page displays a list of your requests for which an action has taken place and are therefore no longer active. Note: this page includes requests related to asset submission, asset publish, asset deletion, asset acquisition and asset registration revocation.

Specifically, this page provides:

- A displayed list of the requests you have generated that are now inactive. Note: depending on how many requests you have, this list could be truncated to display the first several, according to the sort that is in effect on this information.
- For each request shown, the information displayed includes the type of request, its status, the group on whose behalf the request was made, the name and version of the asset involved and time of the request.
- The capability to apply a filter in order to limit the requests displayed.
- The capability to sort the displayed requests.
- A **[Details]** link for each request to display the request detail popup.
- A link to display asset information pages by clicking on the asset name and version link.

My Request History Page Contents

This page contains the following links, information and selections.

Home

Click on this bread crumb link to display your home page.

My Requests

Click on this bread crumb link to return to a page displaying your active requests.

My Request History Table

A table of information on your requests that are currently awaiting action by an appropriate user. See Working With Requests for information on working with this table. Also see Request Details for access to information on the different types of requests.

Pending Requests

In the course of performing work in the library, work items may be triggered that require an action from you (or from one of your peers) in respect to the responsibilities associated with a role you hold. Display a list of requests that are currently pending action by clicking on the **Pending Requests** item on your left navigation bar.

Specifically, this page provides:

- A displayed list of requests generated by activity in your library. This list includes those requests that are still active; that is requests that have not been acted upon by yourself or someone else. Note: depending on how many requests there are, this list could be truncated to display the first several, according to the sort that is in effect on this information.
- For each request shown, the information displayed includes the type of request, its status,the user making the request, the group on whose behalf the request was made, the name and version of the asset involved, the asset description and the date and time of the request.
- The capability to apply a filter in order to limit the requests displayed.
- The capability to sort the displayed requests.
- A link to display the details of the request by clicking on **[Details]**.
- A link to display asset information pages by clicking on the asset name and version link.
- A **[Request History]** link to display a list of requests that you have taken action on in the past.

Pending Requests Page Contents

This page contains the following links, information and selections.

Home

Click on this bread crumb link to display your home page.

[Request History]

Click on this link to display a list of inactive requests.

Pending Requests Table

A table of information on your requests that are currently awaiting action by an appropriate user. See Working With Requests for information on working with this table. Also see Request Details for access to information on the different types of requests.

Pending Request History

In the course of performing work in the library, work items may be triggered that require an action from you (or from one of your peers) in respect to the responsibilities associated with a role you hold. These requests are displayed in your Pending Request list until you have taken action on them. Once you have acted upon a request, it is moved to your Request History list. Display a list of requests that you have taken action on by clicking on the **[Request History]** link on your Pending Requests page.

Specifically, this page provides:

- A list of requests that includes those requests you have taken action on. Note: depending on how many requests there are, this list could be truncated to display the first several, according to the sort and filter that is in effect on this information.
- For each request shown, the information displayed includes the type of request, its status, the user making the request, the group on whose behalf the request was made, the name and version of the asset involved, the asset description and the date and time of the request.
- The capability to apply a filter in order to limit the requests displayed.
- The capability to sort the displayed requests.
- A link to display the details of the request by clicking on **[Details]**.
- A link to display asset information pages by clicking on the asset name and version link.

Request History Page Contents

This page contains the following links, information and selections.

Home

Click on this bread crumb link to display your home page.

Pending Requests

Click on this bread crumb link to display a list of your pending requests.

Request History Table

A table of information on your requests that are currently awaiting action by an appropriate user. See Working With Requests for information on working with this table.

Request Detail

Your application provides a **[Details]** link for each request displayed in a Request table that enables you to request information and activity.

Request types and corresponding detail popups include:

- Asset Submission Request detail popup
- Asset Delete Request detail popup
- Asset Acquisition Request detail popup
- Revoke Asset Registration detail popup

See Working With Requests for more information.

Asset Acquisition Context Popup

The acquisition context popup displays information associated with the relationship established once an acquisition request receives all necessary approval. Once an asset becomes registered to a project (and in some cases also to an asset of that project) information about the acquisition relationship can be accessed by clicking on the Relationship Properties icon presented on the information pages of the acquiring asset and the acquired asset (when applicable). Information gathered as a result of the acquisition approval process is also included on the relationship context page.

There are two ways to display the asset acquisition context pop:

1. Click the Relationship Properties icon presented next to the acquisition relationship on the edit or read only view pages of the acquiring asset's asset in progress. This relationship is available if the acquisition was an asset-based acquisition.
2. Click on the **[Details]** link on the Project Details page located in the Acquisition Status column.

Hovering over the Relationship Properties icon will present a tool tip with a summary of the asset acquisition context.

From this page you can:

- View the context information provided with the registration of an asset to a project.
- Revoke the acquisition relationship in the acquiring asset when applicable.
- View Status of request.

Asset Acquisition Context Popup Contents

This page contains the following selections and information:

Status

Registered is the current status of the asset acquisition request. A **[Request Details]** link is provided next to the Registered status which enables you to display the request detail page, which can provide more information about the request and its approval cycle.

Status is followed by other information related to the request, such as:

- **Project Context -** The project credited with the asset registration.
- **Asset -** A name link is provided to the asset acquired.
- **Acquiring Asset -** If the acquisition is asset-based, a name link is provided to the asset which acquired this asset.
- **Relationship Type -** The name of the relationship used to establish the acquisition, if the acquisition is asset-based.

Properties

This section lists the various properties associated with the completed acquisition request. The specific properties included are determined by your library's configuration of the acquisition governance process and also its configuration for the acquisition relationship context. See your Library Administrator for more information about the configuration aspects of your library.

Current View

If your library is configured to provide alternative views of asset information, you will have a Current View box in the upper right hand corner of the asset information display. The value shown in the Current View box is the name of the asset view currently in effect for your asset information page. The view or views available to you are based on the roles you are assigned for the project you have active when you display this page. If you have multiple roles, your **Current View** will provide a drop-down list of the views available to you. You can switch between views by selecting a new view from the list. If you select the asset view named "Default View", you will see the asset information established for non-role-specific presentation.

Buttons

Update

Click on the **Update** button to initiate a new acquisition request to change context information. To be successful, this request must receive all approvals necessary according to the acquisition governance process applied to the original acquisition request. Note: the **Update** button may or may not be included on your context page depending on the configuration of the Update activity in your library configuration and your role assignments.

Revoke

Click on the **Revoke** button to initiate a request to remove the registration of the asset to the project, and the acquisition relationship in the acquiring asset when applicable. To be successful, the revoke request must receive all approvals necessary according to the revocation governance process applicable to this asset registration. Note: the **Revoke** button may or may not be included on your context page depending on the configuration of the Revoke activity in your library configuration and your role assignments.

Cancel

Click the **Cancel** button to close the Asset Acquisition Context Popup.

Asset Acquisition Request Detail Popup

An asset acquisition request is created when an asset users clicks the **[Acquire]** link of a published asset or by adding a consumption-type relationship and the asset qualifies for governance requirements associated with asset acquisition. Request information is displayed on the request's detail popup. In some cases, the request also enables the gathering of information related to the approval process associated with the acquisition of this asset from users involved in the approval process. Asset acquisition request information is made available to all users involved in the request's governance process from origination through asset registration. See Acquiring an Asset for more information.

If you have requested the acquisition of an asset for your project or for an asset within your project or if you have a role responsible for reviewing requests to acquire the asset, you can use this page to:

- View the information associated with the asset acquisition request before submitting the request or when reviewing the request.
    - Note: If the asset being requested for acquisition has pending changes that are not yet published to the asset, you can view these changes by clicking on the asset's name link on your pending request list page. See Pending Requests for more information.
- Enter additional information associated with the request. This information is entered in the form of request properties which are listed on the request detail page. Request properties can take the form of text, numeric or date values, files or references to files. Note: some properties may be display-only, others may solicit optional information and others may require entry before you can submit, approve or reject the request.
- If you are the requester, click on **Submit** to submit the asset acquisition request.
- If you are a request approver, click on **Approve** or **Reject** to record your decision.
- Click on **Save** to persist information you have entered for the request without taking action to approve or reject.

Asset Acquisition Request Detail Popup Contents

This page contains the following selections and information:

Status

This is the current status of this asset acquisition request. It reflects the current step of the workflow for this asset acquisition. For example, if you are the requester, the status will be NEW. However, once the request is submitted the status will be updated to reflect the process state applicable to your library's asset acquisition process. See About Asset Acquisition for more information on the various process configurations that are available for the governance of asset acquisition.

Status is followed by other information related to the request, such as:

- **Required Role(s)** - the name of the role which is currently required to take the next action on the request. If you are the request submitter, you can hover over the **? icon** of the required role to display a pop-up window listing users assigned the required role. A link to each user's email is also provided.
- **Requesting Group** - the name of the project for which the asset is being requested for reuse.
- **Requester** - the name of the user who originated the acquisition request
- **Acquiring Asset** - the name, version and description of the asset which will be given the acquisition relationship. This information is displayed only if the acquisition requested is an asset-based acquisition.
- **Relationship Type** - the name of the relationship used to record the asset-based acquisition in the acquiring asset. This information is displayed only if the acquisition requested is an asset-based acquisition.

- **Publish Acquiring Asset** - this check box indicates whether the acquiring asset will be submitted for publish once the acquisition relationship is added as a result of the request to acquire an asset. This information is displayed only if the acquisition requested is an asset-based acquisition.
- **Asset** - the name and version of the asset. Click on the asset's name link to display the published asset information.
- **Asset Status** - shows the status of the acquired asset.
- **Asset Source Library** - the library associated with the asset source where the asset resides.
- **Asset Owning Group** - the name of the group that owns the asset being requested.

Approval\Rejection Properties Tabs

This section lists the various approval or rejection properties associated with this request. The properties included with the request may differ at different stages of the approval cycle. Depending on your role in the approval process, you may be required to enter property information prior to submission of the request or taking an approval or rejection action. If so, this is indicated beneath the name of the property. You may also be able to view property information entered by others earlier in the submission approval process.

There are various types of properties possible. Those that are displayed on your asset submission request depends on what has been configured in your library for the asset you are submitting. Some properties will accept a text, numeric, date or boolean value, for example. Other properties may indicate the need for you to name (or browse to) a file. Still others require a reference to a file stored outside of the application. Depending on the type of property, input is supported by an appropriate widget. In some cases, a default value is provided and a value list may be available to choose from.

Comments

Click the **green +** icon to enter an optional comment you would like to associate with this request. Comments entered on a request are viewable from this page, and also from the asset's attachment on the project detail popup.

Note: In the case of the original submission of a request, the following Who/When/Comment information is blank. However, as comments are added throughout the approval process, they are displayed in this section.

Who

This is the name of the user who previously evaluated this submission request and took an action of some type.

When

This is the date and time at which this user processed the asset submission request.

Comment

This is a comment entered by someone participating in this request.

History

This section provides a history of the approval process for this asset submission. In the case of the original submission of a request, the following information is blank. However, as actions are taken throughout the approval process, the system records information about these actions in this section.

The history of a request may include log entries providing details of request activity that are associated with its work flow process. These log entries are included in a request if designated by the work flow configuration for this process. If you are a Library Administrator, please see the Akana Configuration Designer on-line help system for more information regarding the inclusion of trace entries in the history of a request.

Who

This is the name of the user who has performed an action for this request.

When

This is the date and time of the action.

What

This is the action taken. Click the **[View Changes]** link to view the updates made to the request when the specified action was taken.

Buttons

The buttons included with the request may differ at different stages of the approval cycle and depending on your role in the approval process.

Submit

This button is displayed if you are a project participant and have requested to acquire an asset. Once you have entered any required information and are ready to submit the request, click on the **Submit** button. If you are viewing this request as an approver, this button is not shown.

Save

Click on the **Save** button to persist information you have entered for the request without taking action to approve or reject.

Approve

If you are a request approver, this button is displayed on a request submitted by the project participant or a request that has been approved by another approver. Click on this button to grant approval to the asset acquisition request.

Reject

If you are a request approver, this button is displayed on a request submitted by the project participant or a request that has been approved by another approver. Click on this button to deny approval to the asset acquisition request. The Rejection Properties tab must be in focus for this button to be active.

Previous Requests

If you are a request approver, this button is only displayed if the most recent acquisition request for this asset by the same project was rejected. Click on this button to view the details of the acquisition request that was most recently rejected.

Show XML

This button will show the asset acquisition request details in XML form.

Cancel

Click the **Cancel** button to close the Asset Acquisition Request Detail Popup.

Asset Deletion Request Detail Popup

An asset deletion request is created when an Asset Capture Engineer requests the delete of an asset and the asset qualifies for governance requirements associated with asset deletion. Request information is displayed on the deletion request's detail popup. In some cases, the deletion request detail popup also enables the gathering of information related to the approval process associated with the deletion of this asset from users involved in the approval process. Asset deletion request information is made available to all users involved in the request's governance process from origination through asset deletion or request rejection. See Deleting an Asset for more information.

If you have requested the deletion of an asset or have a role responsible for reviewing assets submitted for deletion, you can use this page to:

- View information associated with the asset deletion request before submitting the request or in order to determine whether to approve or reject the request.
    - Note: If the asset being submitted for delete has any changes pending, you can view these changes by clicking on the asset's name link associated with this request on your pending request list page. See Pending Requests for more information.
- Enter additional information associated with the request. This information is entered in the form of request properties which are listed on the request detail popup. Request properties can take the form of text, numeric or date values, files or references to files. Note: some properties may be display-only, others may solicit optional information and others may require entry before you can submit, approve or reject the request.
- If you are the request submitter, click on **Submit** to submit the asset deletion request.
- If you are a request approver, click on **Approve** or **Reject** to record your decision.
- Click on **Save** to persist information you have entered for the request without taking action to approve or reject.

Asset Deletion Request Detail Popup Contents

This page contains the following selections and information:

Status

This is the current status of this asset deletion request. It reflects the current step of the workflow for asset deletion governance. For example, if you are the Asset Capture Engineer submitting this request, the status will be NEW. However, once the request is submitted the status will be updated to reflect the process state applicable to your library's asset deletion process configuration.

Status is followed by other information related to the request, such as:

- **Required Role(s)** - the name of the role or roles required to take the next action on the request. If you are the request submitter, you can hover over the ? icon next to the required role to display a pop-up window listing users assigned the required role. A link to each user's email is also provided.
- **Requesting group** - the name of the group for which the asset is being submitted. In the case of an asset submission request, this group is the same group as the asset owning group.
- **Requester** - the name of the user who originated the submission request.
- **Asset** - the name and version of the asset. Click on asset's name link to display the asset in progress being submitted for publish.
- **Asset Status** - shows the status of the asset.
- **Asset Source Library** - the library associated with the asset source where the asset resides.
- **Asset owning group** - the name of the group in your library which owns the asset being

submitted.

Approval\Rejection Properties Tabs

This section lists the various approval or rejection properties associated with this request. The properties included with a request may differ at different stages of the approval cycle. Depending on your role in the approval process, you may be required to enter property information prior to submission of the request or taking an approval or rejection action. If so, this is indicated beneath the name of the property. You may also be able to view property information entered by others earlier in the submission approval process.

There are various types of properties possible. Those that are displayed on your asset submission request depends on what has been configured in your library for the asset you are submitting. Some properties will accept a text, numeric, date or boolean value, for example. Other properties may indicate the need for you to name (or browse to) a file. Still others require a reference to a file stored outside of the application. Depending on the type of property, input is supported by an appropriate widget. In some cases, a default value is provided and a value list may be available to choose from.

Comments

Click the **green +** icon to enter a optional comment in this field to be included with the request.

Note: In the case of the original submission of a request, the following Who/When/Comment information is blank. However, as comments are added throughout the approval process, they are displayed in this section.

Who

This is the name of a user who has evaluated this submission request and took an action of some type.

When

This is the date and time this user processed the asset submission request.

Comment

This is a comment entered by someone participating in this request approval cycle.

History

This section provides a history of the approval process for this asset submission. In the case of the original submission of a request, the following information is blank. However, as actions are taken throughout the approval process, the system records information about these actions in this section.

The history of a request may include log entries providing details of request activity that are associated with its work flow process. These log entries are included in a request if designated by the work flow configuration for this process. If you are a Library Administrator, please see the Akana Configuration Designer on-line help system for more information regarding the inclusion of trace entries in the history of a request.

Who

This is the name of the user who has performed an action for this request.

When

This is the date and time of the action.

What

This is the action taken. Click the **[View Changes]** link to view the updates made to the request when the specified action was taken.

Buttons

The buttons included with the request may differ at different stages of the approval cycle and depending on your role in the approval process.

Submit

This button is displayed if you are an Asset Capture Engineer and enables you to submit this asset for publish. Once you have entered any required information and are ready to submit the request, click on the **Submit** button. This button is not available if you are viewing this request via the My Requests page because in that case the request has already been submitted.

Save

Click on the **Save** button to persist information you have entered for the request without taking action to approve or reject.

Approve

This button is displayed if you are a request approver and the request is active. Click on this button to grant approval to the asset submission request.

Reject

This button is displayed if you are a request approver and the request is active. Click on this button to deny approval to the asset submission request. The Rejection Properties tab must be in focus for this button to be active.

Previous Requests

If you are a request approver, this button is only displayed if the most recent deletion request for this asset was rejected. Click on this button to view the details of the deletion request that was most recently rejected.

Show XML

This button will show the asset delete request details in XML form.

Cancel

Click the **Cancel** button to close the Asset Deletion Request Detail Popup.

Revoke Asset Registration Request Detail Popup

An asset revocation request is created when a user clicks the **Revoke** button on the asset acquisition context popup associated with an asset registration and the request is associated with a governance process established for revoking the registration of an asset. Request information is displayed on the request's detail page. In some cases, the request also enables the gathering of information related to the approval process associated with the revocation of the asset registration from users involved in the approval process. Asset revocation request information is made available to all users involved in the request's governance process from origination through revocation or request rejection. See Revoking an Asset Registration for more information.

If you have requested the revocation of an asset registration or have a role responsible for reviewing requests for asset registration, you can use this page to:

- View information associated with the asset revocation request before submitting the request or in order to determine whether to approve or reject the request.
  - Note: If the asset being requested for registration revocation has pending changes that are not yet published to the asset, you can view these changes by clicking on the asset's name link on your pending request list page. See Pending Requests for more information.
- Enter additional information associated with the request. This information is entered in the form of request properties which are listed on the request detail page. Request properties can take the form of text, numeric or date values, files or references to files. Note: some properties may be display-only, others may solicit optional information and others may require entry before you can submit, approve or reject the request.
- If you are the request submitter, click on **Submit** to submit the asset revocation request.
- If you are a request approver, click on **Approve** or **Reject** to record your decision.
- Click on **Save** to persist information you have entered for the request without taking action to approve or reject.

Revoke Asset Registration Request Detail Popup Contents

This page contains the following selections and information:

Status

This is the status of the asset registration revocation request. It reflects the current step of the revocation workflow. See About Asset Acquisition for more information on the various process configurations that are available for the governance of asset registration revocation.

Status is followed by other information related to the request, such as:

- **Required Role** - the name of the role which is currently required to take the next action on the request. If you are the request submitter, you can click on the name of the required role to display a pop-up window listing users assigned the required role. A link to each user's email is also provided.
- **Requesting group** - the name of the group (project) for which the request for revocation is being submitted.
- **Requester** - the name of the user who originated the revocation request.
- **Acquiring Asset** - the name, version and description of the asset which will be given the acquisition relationship. This information is displayed only if the acquisition requested is an asset-based acquisition.
- **Relationship Type** - the name of the relationship used to record the asset-based acquisition in the acquiring asset. This information is displayed only if the acquisition requested is an asset-based acquisition.

- **Publish Acquiring Asset** - this check box indicates whether the acquiring asset will be submitted for publish once the acquisition relationship is removed as a result of the request to revoke registration. This information is displayed only if the acquisition being revoked is an asset-based acquisition.
- **Asset** - the name and version of the asset associated with the revocation request.
- **Asset Status** - shows the status of the acquired asset.
- **Asset Source Library** - the library associated with the asset source where the asset resides.
- **Asset owning group** - the name of the group in your library which owns the asset associated with the revocation request.

Approval\Rejection Properties Tabs

This section lists the various approval or rejection properties associated with this request. The properties included with the request may differ at different stages of the approval cycle. Depending on your role in the approval process, you may be required to enter property information prior to submission of the request or taking some action with it. If so, this is indicated beneath the name of the property. You may also be able to view property information entered by others earlier in the submission approval process.

There are various types of properties possible. Those that are displayed on your asset submission request depends on what has been configured in your library for the asset you are submitting. Some properties will accept a text, numeric, date or boolean value, for example. Other properties may indicate the need for you to name (or browse to) a file. Still others require a reference to a file stored outside of the application. Depending on the type of property, input is supported by an appropriate widget. In some cases, a default value is provided and a value list may be available to choose from.

Comments

Click the **green +** icon to enter a optional comment in this field to be included with the request.

Note: In the case of the original submission of a request, the following Who/When/Comment information is blank. However, as comments are added throughout the approval process, they are displayed in this section.

Who

This is the name of a user who has evaluated this revocation request and took an action of some type.

When

This is the date and time this user processed the revocation request.

Comment

This is a comment entered by someone participating in this request approval cycle.

History

This section provides a history of the approval process for this asset submission. In the case of the original submission of a request, the following information is blank. However, as actions are taken throughout the approval process, the system records information about these actions in this section.

The history of a request may include log entries providing details of request activity that are associated with its work flow process. These log entries are included in a request if designated by the work flow configuration for this process. If you are a Library Administrator, please see the Akana Configuration Designer on-line help system for more information regarding the inclusion of trace entries in the history of a request.

Who

This is the name of the user who has performed an action for this request.

When

This is the date and time of the action.

What

This is the action taken. Click the **[View Changes]** link to view the updates made to the request when the specified action was taken.

Button

The buttons included with the request may differ at different stages of the approval cycle and depending on your role in the approval process.

Submit

This button is displayed if you are the requester of the asset revocation. Once you have entered any required properties and are ready to submit this asset acquisition request, click on the **Submit** button.

Save

Click on the **Save** button to persist information you have entered for the request without taking action to approve or reject.

Approve

This button is displayed if you are a request approver and the request is active. Click on this button to grant approval to the asset revocation request.

Reject

This button is displayed if you are a request approver and the request is active. Click on this button to deny approval to the asset submission request. The Rejection Properties tab must be in focus for this button to be active.

Previous Requests

If you are a request approver, this button is only displayed if the most recent revocation request for this asset by the same project was rejected. Click on this button to view the details of the revocation request that was most recently rejected.

Show XML

This button will show the asset revocation request details in XML form.

Cancel

Click the **Cancel** button to close the Revoke Asset Registration Request Detail Popup.

Asset Submission Request Detail Popup

An asset submission request is created when an asset is submitted for publish and the asset qualifies for governance requirements associated with asset publish. Request information is displayed on the submission request's detail popup. In some cases, the submission request detail popup also enables the gathering of information related to the approval process associated with the publish of this asset from users involved in the approval process. Asset submission request information is made available to all users involved in the request's governance process from origination through asset publish or request rejection. See Submitting an Asset for Publish for more information.

If you have submitted an asset for publish or have a role responsible for reviewing assets submitted for publish, you can use this page to:

- View information associated with the asset submission request before submitting the request or in order to determine whether to approve or reject the request.
    - Note: You can view the asset in progress proposed for publish by clicking on the asset's name link associated with this request on your pending request list page. See Pending Requests for more information.
- Enter additional information associated with the request. This information is entered in the form of request properties which are listed on the request detail page. Request properties can take the form of text, numeric or date values, files or references to files. Note: some properties may be display-only, others may solicit optional information and others may require entry before you can submit, approve or reject the request.
- If you are the request submitter, click on **Submit** to submit the asset publication request.
- If you are a request approver, click on **Approve** or **Reject** to record your decision.
- Click on **Save** to persist information you have entered for the request without taking action to approve or reject.

Asset Submission Request Detail Popup Contents

This page contains the following selections and information:

Status

This is the current status of this asset submission request. It reflects the current step of the workflow for this asset submission. For example, if you are the Asset Capture Engineer submitting this request, the status will be NEW. However, once the request is submitted the status will be updated to reflect the process state applicable to your library's asset submission process configuration.

Status is followed by other information related to the request, such as:

- **Required Role(s)** - the name of the role or roles required to take the next action on the request. If you are the request submitter, you can hover over the ? icon next to the required role to display a pop-up window listing users assigned the required role. A link to each user's email is also provided.
- **Requesting group** - the name of the group for which the asset is being submitted. In the case of an asset submission request, this group is the same group as the asset owning group.
- **Requester** - the name of the user who originated the submission request.
- **Asset** - the name and version of the asset. Click on asset's name link to display the asset in progress being submitted for publish.
- **Asset Status** - shows the status of the asset.
- **Asset Source Library** - the library associated with the asset source where the asset resides.
- **Asset owning group** - the name of the group in your library which owns the asset being

submitted.

Approval\Rejection Properties Tabs

This section lists the various approval or rejection properties associated with this request. The properties included with a request may differ at different stages of the approval cycle. Depending on your role in the approval process, you may be required to enter property information prior to submission of the request or taking an approval or rejection action. If so, this is indicated beneath the name of the property. You may also be able to view property information entered by others earlier in the submission approval process.

There are various types of properties possible. Those that are displayed on your asset submission request depends on what has been configured in your library for the asset you are submitting. Some properties will accept a text, numeric, date or boolean value, for example. Other properties may indicate the need for you to name (or browse to) a file. Still others require a reference to a file stored outside of the application. Depending on the type of property, input is supported by an appropriate widget. In some cases, a default value is provided and a value list may be available to choose from.

Comments

Click the **green +** icon to enter a optional comment in this field to be included with the request.

Note: In the case of the original submission of a request, the following Who/When/Comment information is blank. However, as comments are added throughout the approval process, they are displayed in this section.

Who

This is the name of a user who has evaluated this submission request and took an action of some type.

When

This is the date and time this user processed the asset submission request.

Comment

This is a comment entered by someone participating in this request approval cycle.

History

This section provides a history of the approval process for this asset submission. In the case of the original submission of a request, the following information is blank. However, as actions are taken throughout the approval process, the system records information about these actions in this section.

The history of a request may include log entries providing details of request activity that are associated with its work flow process. These log entries are included in a request if designated by the work flow configuration for this process. If you are a Library Administrator, please see the Akana Configuration Designer on-line help system for more information regarding the inclusion of trace entries in the history of a request.

Who

This is the name of the user who has performed an action for this request.

When

This is the date and time of the action.

What

This is the action taken. Click the **[View Changes]** link to view the updates made to the request when the specified action was taken.

Buttons

The buttons included with the request may differ at different stages of the approval cycle and depending on your role in the approval process.

Submit

This button is displayed if you are an Asset Capture Engineer and enables you to submit this asset for publish. Once you have entered any required information and are ready to submit the request, click on the **Submit** button.

Save

Click on the **Save** button to persist information you have entered for the request without taking action to approve or reject.

Approve

This button is displayed if you are a request approver and the request is active. Click on this button to grant approval to the asset submission request.

Reject

This button is displayed if you are a request approver and the request is active. Click on this button to deny approval to the asset submission request. The Rejection Properties tab must be in focus for this button to be active.

Previous Requests

If you are a request approver, this button is only displayed if the most recent acquisition request for this asset by the same project was rejected. Click on this button to view the details of the acquisition request that was most recently rejected.

Show XML

This button will show the asset submission request details in XML form.

Cancel

Click the **Cancel** button to close the Asset Submission Request Detail Popup.

Relationship Properties Popup

The relationship properties popup is displayed when a context-enabled relationship is added to an asset, and the relationship includes properties. The properties you see depends on what has been configured in your library for the type of asset you are adding the relationship to.

Some properties will accept a text, numeric, date or boolean value, for example. Other properties may indicate the need for you to name (or browse to) a file. Still others require a reference to a file stored outside of the application. Depending on the type of property, input is supported by an appropriate widget. In some cases, a default value is provided, and a value list may be available to choose from.

Once a relationship with properties is added to an asset, information about the relationship properties can be accessed by clicking on the Relationship Properties icon presented on the information page of the asset.

Relationship Properties

This section includes general information about the relationship.

Asset: The name and version of the related asset.

Relationship Type: The type of relationship used to associate the two assets with each other.

Properties

This section lists the various properties associated with the relationship. The specific properties included are determined by your library's configuration of the relationship consumption context. See your Library Administrator for more information about the configuration aspects of your library.

Buttons

Save

Click on the **Save** button to save the property values that have been configured, and complete configuration of the new relationship.

Defer

Click on the **Defer** button to continue adding the relationship, and wait to enter the property information until a later time.

Defer All

This button is only displayed when adding more than one relationship at a time. Click on the **Defer All** button to continue adding the relationships, and wait to enter the property information for all the relationships until later.

Configuration of required relationship properties must be completed in order for the asset submission process to continue.

About Asset Searches

One way to search for library assets is by conducting a search. Searches enable you to find published assets by using a variety of search criteria without persisting the search specification for your project. An example of a search using the Akana web browser application would be to enter a search string into the search box text field and execute the search. An example of a search using a Akana™ rich client application is to click on the Search icon of the Search Results view, then enter search text and click find in the wizard panel.

When a search is triggered, a resulting list of qualified items is displayed on a result page or in the result view of a rich client application. In the event a search finds no qualified items (i.e. no assets or library elements satisfy your search criteria) you are notified of this. Searches differ from other types of searches in the types of search criteria that can be used and in the fact that they are not saved for your project automatically. You do have the option to save the specification for a search if you wish.

Search Features

- Text strings are often used, but are optional for a search. See each of the search context choices following for a discussion of the behavior of a search in each case.
- If a text string is included in your search, all strings assume a leading and trailing wild card. Items qualify if they contain the search string.
- Asset searches are not automatically persisted for your project. However, you do have the option to persist the search if you wish.
- If you choose to persist a search, this results in an asset query search specification being saved in your project. The asset query specification will contain the applicable criteria values from your search.

Search context

You can choose from the following context selections to determine how the search criteria will be applied:

Asset (open context)

An asset search will return a list of assets available to your project whose name, overview, description, function name, function description or classifier value includes the text string (if any) you have entered as search text. The resulting asset Search Results page will display a list of the assets (asset names, versions, and descriptions) that meet your criteria. If you do not include a text string in your search, all assets that are available to your project are included in this list.

Asset by Name

An Asset by Name search will return a list of assets available to your project whose name (or alias) includes the text string given (if any). The resulting Search Results page will display the name, version, and description of all the assets that meet this condition. If you do not include a text string in your search, all assets that are available to your project are included in this list.

Asset by Keyword

An Asset by Keyword search will return a list of assets available to your project which have a keyword classifier value matching the full or partial text string you have entered. Note that the keyword classifier value of the asset must be an exact match to the text string you have entered. Partial text strings must include wildcard characters (* or ?).

Search for Assets

Every user in your library has the Asset User role. In other words, all library users have the ability to search for assets published to their library and create saved searches. Asset Users can research assets of interest and collaborate with others through the asset's discussion forum. Click on one of the links below for the particular search type you want more information about.

Search Mechanisms

There are six primary ways to conduct an asset search:

- Asset Tree navigation
- Search Box search
- Custom Search
- Asset Query
- Model Based Search
- Quick Search

Asset Search

With asset searching, your library provides:

- for all queryable artifacts to be included in each search, unless the search specifically indicates content that does not include searchable artifacts.
- the means to establish search criteria based on
  - custom search types established with XPath expressions
  - classification criteria
  - search string criteria
- a search result page
  - including your choice of classifier information provided for each result asset
  - that is paginated and sorted by best match
  - can be reordered by classifier values
- Asset in Progress lists are provided on a single page with tabs and each tab is sort-enabled

See your Library Administrator for more information on the search configuration of your library.

Search Specification List

The Search List displays a list of all search specifications you have created and saved whether from an asset query search, search box search, custom search, model based search or asset tree search. This page only includes those saved searches you have created yourself. To view all saved searches, view the Searches section of the main content window on the Home page.

Search List Details

From this page you can:

- View the list of search specifications that have been created.
- Click on **[Create New Asset Query]** to display the Asset Query specification page.
- Click on **[Run]** to execute the saved query.
- Click on a search name link to display the saved search criteria on the search specification page.

Search List Page Contents

Home

Click on this bread crumb link to display your home page.

[Create New Asset Query]

Click on this link to display the Asset Query specification page, enabling you to create a new asset query.

Name

This column displays:

- Saved searches with the alert feature set will display a special icon  next to the Name on your Home page and Search List page.
- Clicking the **[Run]** link performs the saved search.
- The name of the search as a link. By clicking on the search name link, you can display the search specification page enabling you to view, modify and/or run the search.

Description

This is a text description of the search.

Last Modified

This column shows the date and time each search was last saved.

View/Edit Specification Detail

The Asset Query Specification enables you to display, edit and save an existing asset query specification. To display the specifications for an existing asset query, click on the asset query name link in the Search section of your home page or on a Search List page. You can also display the specifications of an asset query by clicking on **[Edit Search Properties]** on any search results page.

From this page you can:

- Enter, view and edit information about the asset query.
- Designate "Alert" status for your Asset Query Specification. Setting a search alert causes you to receive email notification when new or updated assets become available that meet the criteria of your asset query.
- Save the Asset Query Specification as a different name in order to duplicate its criteria for use in a new asset query.
- Delete the asset query.
- Run the asset query to view its results.

Asset Query Specification Page Contents

This page contains the following links and asset information and selections.

Asset Query Specification Page Links

Home

Click on this bread crumb link to display your home page.

Searches

Click on this bread crumb link to display the Search List page, which lists and provides access to the searches available to this project.

RSS

Click on this button to subscribe to an RSS feed for this search. This button is only available to you if your library is configured to support RSS feed subscription to asset searches.

[Run]

Click on this link to perform an asset search according to the current specifications for your asset query. The Search Results page will be displayed, which enables your access to asset information. There is also a **Run** button available to you on the right of the search string entry box.

[Save]

Click on this link to persist this search for future use. On the save dialog, designate the name and description for the search. As an option, you can choose to set an "Alert" for your search. Turning on the alert will result in receiving an email notification each time an asset is publish or republished that meets the criteria of your asset query. Your saved asset query will available to you in the Search section of your home page. No other users will have access to your saved search.

[Save As]

Click on this link to create and save another asset query with the same criteria as your current asset query. Clicking on this link displays a search detail page with the same criteria established as your original asset query, except for name and description. Next, enter a new name and description and save this search specification by clicking on the Save button.

[Delete]

Click on this link to remove this asset query.

Search has unsaved changes

This warning message will be displayed when search criteria has been entered or changed and not saved.

Asset Query Information

Start from:

If you are creating a new asset query, a **Start from:** dropdown list is provided, which allows you to select which predetermined search type you want to base your new search on. Each selection will search predefined data. By default, *Assets by Content* is selected, which searches the broadest range of metadata, classifiers and artifacts. See Advanced Query Criteria for more information about Search Types.

Once the new query is saved, this "start from" information is shown as the search description. The description reflects the search type, for example *Search for Assets by metadata and artifact content*.

Search for:

This section enables you to enter a search string(s) and select the context applied for your search. For example, if you enter the string *bloc* then click on the box next to Asset name (or alias), running the search will find all assets whose name (or alias) includes *bloc.* You must select at least one box in this section if you enter a search string, but can include as many you would like.

You can enter multiple search strings for your search. If you do so, designate the *any* or *all* operator with which to qualify your search. See Help Entering Search Terms for more information about search string criteria, classification criteria, and search type.

Entry of a search string(s) is optional. If you enter a value, result assets must meet the search string criteria in addition to any classification criteria you include in this specification. Searchable asset elements (in addition to classifier values) include:

- Asset Name(or alias)
- Asset Description
- Asset Overview
- Any Classifier Value
- Any Searchable Artifact (Applies only to artifacts defined as "searchable" in your library's Global Definition Template)

Filtered by Selected Classifier Values:

Classification criteria included in this search specification are listed here. Classification criteria are classifier values to be used as criteria when the asset query is run. These values are compared to the classifier values of the library assets. Assets that meet these criteria (in addition to all other criteria on the specification) are included in the list of assets resulting from the search. Examples of classification criteria include: type of operating system, database vendor, and a preferred asset supplier.

Classification criteria values may be populated into each new Asset Query Specification from your project profile as default values, depending on the configuration of your project.

Click on **[Edit]** to display the Edit Classification Criteria page.

Click on **[Clear]** to remove all classifier values from this search specification.

See the Edit Classification Criteria page for more details about adding classifier criteria to your asset query.

Including Columns for Classifiers:

You can select or change the columns displayed for assets resulting from running this asset query. The default result columns are set by the configuration of your project. However, you can select other classifiers for this asset query and even save your selections as your default result columns if desired. The classifiers available for selection as a result column are those that are designated as required values in one or more asset capture templates. See your Library Administrator for more information.

Click on **[Edit]** to display the Edit Classifier Columns popup.

[Show search criteria details]

Click on **[Show search criteria details]** if you want to view information about how the criteria of the search will be used to find qualified assets. **[Hide search criteria details]** hides the search criteria details.

Save a Search popup

Click on **[Save]** to persist any changes to the asset query. On the save dialog, you can modify the name and description for the search. You can also change whether or not an "Alert" is set for your search. Turning on the alert will result in receiving an email notification each time an asset is publish or republished that meets the criteria of your asset query. Your saved asset query will be available to you in the Search section of your home page or from the Search List. No other users have access to your saved search.

To save your asset query click the **[Save]** link and a Save a Search popup will display the following:

Name:

This is the name you are giving this search. This name must be unique within your project.

Description:

This is an optional text description of the search.

Alert me ...

The Alert feature allows you to be notified (by email) of new or modified assets that meet the Asset Query Specification criteria. To set the alert, click the alert check box. For each new or modified asset published you will receive an email alerting you to the Asset Query Specification match if the criteria is met. This email contains the Asset Query Specification name, information about the asset that meets the Asset Query Specification and a hyperlink to the asset. Saved searches with the alert feature set will display a special icon next to the Name on your Home page and Search List page.

Save

Click on this button to save this search to your project. Clicking on **Save** will save all entries or changes to the **Start From, Search for, Remember this search as,** and **Description** entries. The **Classification Criteria** sections following are not saved by clicking this button. Instead, they are saved by independently by clicking on save when changes are made through the edit pop-ups displayed by clicking on each section's corresponding **[Edit]** link.

Create New Asset Query Specification

You can create a new Asset Query Specification by clicking on the **[Create Asset Query]** link in the Searches section of your home page. If coming from the Model Based Search, Search Box search, Custom Search or Asset Tree navigation click the **[Edit Search Properties]** link on the Search Results page. The asset query you create can be saved. See Asset Query Specification detail page for more information.

From this page you can:

- Create an Asset Query
- Run an Asset Query
- Save an Asset Query

How to create a new Asset Query Specification:

1. Display the Asset Query specification page by clicking on the **[Create Asset Query]** link in the Searches section of your home page.
2. Use the default "Start from" search type to search all asset elements or select an alternative search type from the drop down list. The search types available are determined by your library search configuration. See your Library Administrator for more information on the search types configured for your library.
3. Option: you can add a search string for matching to asset elements. See Help Entering Search Terms for more information.
4. Option: you can add classifier values for matching to asset classifiers. The asset query specification may be pre-populated with default values for classification criteria, depending on the configuration of your project. Click **[Edit]** to add or changed classification criteria for the asset query.
5. Option: you can select the columns displayed for assets resulting from running this asset query. The default result columns are set by the configuration of your project. However, you can select other classifiers for this asset query and even save your selections as your default result columns if desired. The classifiers available for selection as a result column are those that are designated as required values in one or more asset capture templates. See your Library Administrator for more information.
6. Option: click on **[Show search criteria details]** if you want to view information about how the criteria of the search will be used to find qualified assets.
7. Click on **[Save]** to persist this search for future use. On the save dialog, designate the name and description for the search. As an option, you can choose to set an "Alert" for your search. Turning on the alert will result in receiving an email notification each time an asset is publish or republished that meets the criteria of your asset query. Your saved asset query will available to you in the Search section of your home page. No other users will have access to your saved search.
8. Optional: click on **[Run]** to perform the Asset Query, results will reflect assets that meet the entered search criteria.

Repetitive queries can be performed with a particular Asset Query by modifying the classification criteria values and/or search string criteria used. If you run the Asset Query again after modifying these values, the query result will reflect assets that meet the modified criteria.

Search Results

The Search Results page displays a list of assets that meet the criteria specified for your search. You can display this page by performing an asset search. Each row of the result list contains information about an asset that meets the criteria of the search.

From this page you can:

- View the list of assets found by performing your search
- Click on an asset name link to display its information
- Modify your search criteria
- Perform actions against assets in your search list
- Add assets to your asset working set

Search Results Page Contents

Home

Click on this bread crumb link to display your home page.

Searches

Click on this bread crumb link to display the Search List page.

Search

Click on this bread crumb link to display the search properties page.

Search Results Page Links

[Edit Search Properties]

Click on this link to display the Asset Query Specification page, enabling you to modify the search criteria and optionally save the search specification.

[Action Name] or [Process Assets]

Depending on whether your Library Administrator has configured additional actions for your library, you may see one of these additional links. Click on the *[Action Name]* link to perform the named action on the selected assets, or click on [Process Assets] to see a dialog allowing you to select from a list of actions you can perform against the selected assets. A common action you might see here is the Delimited File Exporter, which allows asset information to be exported into a format compatible for later use with the Delimited File Importer. For more information about available actions, see your Library Administrator or the Library Configuration Guide.

As you select and deselect assets in your list, the link is updated to reflect the number of assets you have selected. Once you have selected an action to perform, you may be prompted to enter parameter information. Enter the requested information, and click **Process** to complete processing.

[Add to Working Set]

Click on this link to add the selected assets to your asset working set. The Asset Working Set allows you to group together a set of published assets in order to later perform actions against them. When you are ready to perform an action against the assets in your working set, click on the Asset Working Set link on the left navigation bar to bring up the Asset Working Set dialog.

[Clear All Selected Items]

Click on this link to deselect all of the assets you have selected on all pages of the current search results. Each selected asset checkbox is cleared, and the count of selected assets is no longer shown.

Search Result List

Your search results are presented in a list. The columns shown for each asset includes the asset name and version. Depending on your search configuration, your search results may include up to three additional columns of asset classifier information. The included columns default to the classifiers selected for your active project. If your project does not identify the columns to be used, Asset Type is used. Alternatively, you may identify the columns you wish to include for a search on the Search Properties page or on the result page itself. In addition, you can click on the column header to sort the assets. You can also re-arrange the columns by dragging and dropping the column header to a new location in the header row. Use the controls made available by hovering on the column heading and clicking the down arrow at the end of the column header, then selecting sort order from the menu provided. You can also remove a column from the display using this same menu.

Selecting Assets

The selection boxes along the left side of your asset list are used to select the item(s) you want to take action on:

- To select individual assets, click the selection box for each asset you want to use.
- To select all the assets on the current page, click the checkbox next to the search result column headings.
- To select all assets resulting from your search, including assets not currently in view (those on subsequent pages), leave all the checkboxes unchecked. When you click on the *[Action Name]*, [Process Assets], or [Add to Working Set] link, you will be prompted to decide whether to take action on all the assets.

Asset Name (Version)

This is the name and version of the assets that meet the criteria of your search. Each asset name and version is an active link. If you click on an asset name and version link, the asset's information page or asset popup window is displayed. An asset type icon with tool tip is also displayed next to the asset name for quick identification of asset type.

Note: additional columns of information may be included for the assets depending on your Account Settings and your library configuration.

Search Results Paginate Controls

In addition to providing the asset information, there are additional paginate controls at the bottom of the search result page:

- You can move through the result pages by clicking the **<** or **>** icons as well as by entering the page number.
- Click the **Refresh** icon to update your search results.
- Click the **Show Asset Description** button to toggle on/off the display of asset description.
- Click the **Sort By Best Match** button to sort assets more closely meeting your search criteria so they are listed first and the rest follow in descending order.
- Change the number of assets viewed per page by clicking the **Asset per Page:** button.
- View a total count of assets included in the result set, if displayed. Note: see Manage My Account for more information about turning this option on or off.

Search Box Search

The Search Box on your left navigation bar enables you to find published assets. All Users can perform a Search Box search for assets and persisted searches. Using the search box, you can find assets by entering a search string and clicking the **Search** button.

From this page you can:

- Search for assets using a search box search
- See what elements are searched using the search box

Searching for Assets with the Search Box

One way to search for assets in your library is by conducting a search box search. Using the Search box in the consumption section of your left navigation bar produces search results in the main content window based on the search string you enter. A search box search is not persisted unless you choose to do so.

Using the search box, you can find assets by entering a search string and clicking the **Search** button. Each search term is expressed as a character string and may represent a full or partial match to what is expected in the assets or asset artifacts. See Asset Elements Searched for more information about what elements are search when doing a search box search.

Search Box Criteria

The search box string criteria box is optional but if you enter one or more search strings you can use some conditional operators to refine your search results. See Advanced Query Criteria for more information about conditional operators.

Performing a Search

You can initiate a search box search by optionally entering a search string. By clicking the **Search** button the query will be run and displayed on the Search Results page in the main content window.

See Search Results page for more information about refining your search criteria and the Asset Query Specification page for information about persisting a search.

Asset Elements Searched

A Search Box search will return a list of published assets available which include the given text string in any of the following asset elements:

- Asset Name(or alias)
- Asset Description
- Asset Overview
- Any classifier value
- Any searchable artifact (Applies only to artifacts defined as "searchable" in your library's Global Definition Template)
- Search box search results may be limited by your role, project, group and the configuration setting of your library. See your Library Administrator for more information.

Asset Query

One way to search for library assets is through a search called an asset query. An asset query enables you to find assets by specifying a search string and/or a set of classification criteria values. You can perform an asset query by creating an Asset Query specification and running it. Alternatively, you can perform a search, then edit the search properties to add classification criteria to create an Asset Query.

An Asset Query enables you to save the criteria used to perform a query, although this is optional. Saving the Asset Query search specification makes it possible to:

- Rerun the same query at any time to update the resulting asset list.
- Modify the search criteria and rerun the query.
- Set an alert on the query to be notified by email of newly published or republished assets that meet the search criteria.
- Save query specifications with a name and description.
- Rerun a search at any time, with or without modification.

Searching for Assets with an Asset Query

Asset Query creation and use will vary depending on your library's search configuration. See your Library Administrator for more information on the search type configuration of your library.

Asset Query Criteria

Asset query criteria consist of:

1. Search Type: Selection of a search type is optional for new asset queries. If no selection is made, the search will be performed against all asset content. See search types for information on the search types available to you. When creating a new asset query or search box search, you can select the search type from the list available. However, when you choose to edit search properties you will be working within the search type previously selected.
2. Text query strings or search strings: full or partial text strings that can be used to search for matching text in selected parts of asset metadata. Search strings are optional to include in an Asset Query. Asset Queries created from a search box quite often include search strings using the following conditional operators or wild cards in the search strings.
    - You can include more than one search string by leaving a space between each string. If a search string includes an embedded space, enclose the string in **"quotations"**.
    - If you have multiple search strings, you can designate whether the search will qualify results based on an **AND** condition (where *all* search strings must be found in an asset for it to qualify) or an **OR** condition (where an asset will qualify if *any* of the search strings are found in the asset.
    - Each search string you enter is assumed to have both leading and trailing wild card characters. However, if you are searching by keyword, no wild card characters are assumed nor can be added.
    - You can designate which parts of asset metadata will be searched for the text string, such as asset name, asset description, any classifier, keyword classifier, etc.
3. Classification Criteria: Values for one or more of the classifier types available in your library assets. Classification criteria are optional but may consist of the same types of values entered into asset classifiers, such as date, string, boolean, numeric, etc.
    - When entering criteria values for numeric, boolean and date type classifiers, the classifier values must be an exact match.
    - When entering criteria values for string type classifiers, the search differs from other asset

searches in the following ways:

- If you enter two tokens in the search string, and one of the tokens matches a keyword or a single word in a two word keyword, the asset in question is returned.
- When entering only one token in a search string, if the token matches one of the words in a two word keyword value, the asset is returned.
- Partial string searches must use a wildcard character (* or ?) in order to match a specified asset.

4. For an asset to be included in the Asset Query Result list when the asset query is run, it must match both the search string criteria and the classification criteria.

Iterative querying

Repetitive queries can be performed with a particular Asset Query by modifying the classification criteria values and/or search string criteria used. If you run the Asset Query again after modifying these values, the query result will reflect assets that meet the modified criteria.

In cases where desirable assets are not located, an Asset Query alert may be set to notify you when assets matching the search specification are published to the library.

Edit Classification Criteria

This page enables you to add, change, or remove classification criteria, and the values assigned to each.

Assets in your library contain classifiers, which store information about your assets. These classifiers are customized to your library. An example of a classifier might be *asset type* or *asset supplier*. You can search and filter assets based on these classifer values, by specifying classification criteria. For example, you may want to restrict an asset search to only show assets whose asset type is Service.

Classification criteria are used to specify how the classifiers will be used during asset searches and asset filtering. They can either be specified directly during an asset query, or they can be grouped together into a *classification criteria set*, and this set can then be used to perform the asset search or filtering operation.

To edit the classification criteria included with an asset query, click on the **[Edit]** link on your asset query specification. To edit the classification criteria included in your classification criteria set, click on the **[Edit]** link on your classification criteria set detail page.

From this page you can:

- Select new classifiers to include, or remove classifier selections, by clicking on the corresponding check box in the Keep column
- Enter a value into the text box in the Value column, or choose a value from the associated drop-down list. To use this value, click on the > button. This causes the value in the text box list to be included in the Selected Values column. You can remove items from the Selected Values list by highlighting an item and clicking on the < button.
- Save Classification Criteria

Edit Classification Criteria Contents

This page contains the following links and classifier information and selections.

Edit Classification Criteria Page Links

Home

Click on this bread crumb link to display your home page.

Search

Click on this bread crumb link to display the Search specification page for asset queries.

Classification Criteria Sets

Click on this bread crumb link to display a list of the classification criteria sets in your library.

Classification Criteria Set Detail

Click on this bread crumb link to display the details of your classification criteria set.

[Save]

Click on the **[Save]** link to apply your changes to the criteria, and return to the previous page.

[Clear]

Click on the **[Clear]** link to to erase any displayed values on this page.

[Reset]

Click on the **[Reset]** link to restore the classification criteria values to those that were present before you entered any new information.

[Cancel]

Click on the **[Cancel]** link to return to the previous page without recording any changes.

Classification Criteria Information

Column Titles

- **Keep** - You can check mark or remove the check mark from the box in the *Keep* column corresponding to a particular classification criteria. This enables you to add or remove individual classification criteria to this Asset Query Specification or Classification Criteria Set.
- **Name** - The classifier names are displayed under this label. Each classifier name is sorted on this page in alphabetical order.
- **Value** - The **> select** and **< un-select** icons add or remove criteria from the Suggested Values and Valid Values selection box to the Selected Values selection box. Values in the Selected Values box are used in this asset query search.

Classification Criteria Set:

Click on a set name in this drop-down list to populate your classification criteria with the values from the set. This drop-down is optional and may not be displayed depending on your Library's configuration. Choosing a classification criteria set here will cause all of your previous selections to be overwritten and replaced with the selections in the set you selected.

Classification Criteria values:

Alternatively, you can edit the classification criteria individually. You can click to check or remove the check mark from the box in the *Keep* column corresponding to a particular classification criteria. This enables you to add or remove individual classification criteria for this Asset Query Specification or Classification Criteria Set.

For each classification criteria you want to use, you can enter values or choose from the list of *Suggested* or *Valid Values* and click on the **>** button. This will add to the list of Selected Values for this criteria. To remove a *Selected Value* from the criteria, select it from the *Selected Values* list and click on the **<** button. Note: see the section on **Working With: Compound Classifiers** below for information on establishing criteria for classifiers of this type.

Classification Criteria values -- values for one or more of the classifiers available in your library assets.

- Each classification criteria for a string type classifier is considered to have a leading and trailing wild card with the value you enter. Entering a full or partial string value for a string-type classifier will designate that library assets that include this string in their corresponding classifier value will be considered a match.
- Numeric, Boolean and Date classifier values must be an exact match.
- If more than one asset classifier value is included in your specification, *all* classifier values must be matched in order for an asset to be considered a match. In other words, in the case of multiple classifier values being used as search criteria, the classifier values are considered to have an "AND" relationship to other classifier values. All classifier criteria must be a match in order for an asset to be considered a match to the search specification criteria.

Working With:

Compound Classifiers

You may establish classification criteria using classifiers defined as compound. A compound classifier is one that is comprised of two or more fields of information related in a designated order. There are two ways to add a compound classifier to the selected values box.

1. Select from the dropdown list and the value will be populated with the suggested value box above. Once you have selected the first dropdown, the next dropdown box to the right will then be populated with corresponding choices. Once all criteria have been selected, click the **> select** icon to add the criteria to the selected values list. If there is no suggested value box above a corresponding dropdown, then you can only choose from the dropdown list because this is a closed compound classifier list.
2. Type a string value into the suggested value box. Once you are done entering all your criteria, click the **> select** icon to add the criteria to the selected values list.

For example, a compound classifier named "financial-software" may be comprised of the following fields: fs-vendor, fs-package, and fs-version. To establish this classifier as search criteria, you can:

- Designate a value for all three fields. This means assets resulting from the search must contain these three specific values for each of the corresponding fields in their financial-software classifier metadata.
- Designate a value for fs-vendor only. This means assets resulting from the search must contain the fs-vendor value plus any values for fs-package and fs-version. In other words, a wild card is assumed for any trailing fields for which you do not designate a specific value.

Note: Assets which have only partial values in a compound classifier (that is, one or more of the trailing fields have been left blank) will only match classification criteria that have wildcards for those values. They will not match assets whose field values for the classifier have been specifically designated.

Valid Values selection box

This control only allows classifiers values in the list to be selected. Highlight your search values and click the **> select** icon to move the value to the selected values box. This type of control is normally used for boolean and closed classifier lists. Boolean classifier values must be an exact match. To remove a *Selected Value* from the criteria, select it from the *Selected Values* list and click on the **< button**.

Suggested Values selection box

This control allows for the selection of values from the list as well as free form strings to be entered into the Suggested Values box. To add a Suggested Value, type in the string value and click the **> select** icon to move the string value to the selected values box. To move pre-populated values, highlight your value and click the **> select** icon to move the value to the selected values box. To remove a *Selected Value* from the criteria, select it from the *Selected Values* list and click on the **< button**.

- Each classification criteria for a string type classifier is considered to have a leading and trailing wild card with the value you enter. Entering a full or partial string value for a string-type classifier will designate that library assets which include this string in their corresponding classifier value will be considered a match.

Min - Max values

The number control allows you to enter any number, but it must be valid in the form of a whole number or decimal. Numeric classifier values must be an exact match.

Min - Max date values

The date value control has an ellipsis at the end of the value box. Click the ellipsis to open the date control selection popup and select the desired dates. If not using the ellipsis, the date field must be entered in this format: M/D/YY. Date classifier values must be an exact match.

Bottom page Buttons

Buttons at the bottom of the page and corresponding links at the top of the page are available on your

Edit Classification Criteria page:

- Click on the **Save** button to apply your changes to the classification criteria, and return to the previous page.
- Click on the **Clear** button to to erase any displayed values on this page.
- Click on the **Reset** button to restore the classification criteria values to those that were present before you entered any new information.
- Click on the **Cancel** button to return to the previous page without recording any changes.

Model Based Search

One way to search for assets published to your library is through a search called a model based search. A model based search enables you to find assets specified by a set of classifier values by navigating through a reference model (if your active project includes access to one or more reference models). Classification criteria values represent desired asset characteristics that may be linked from your reference model. You can navigate through a reference model then perform a search and alternatively, you can create an Asset Query Search Specification associated with a reference model. See About Reference Models for more information.

A model based search enables you to save the criteria used to perform a search, although you can perform model based searches without saving the specification. Saving your model based search makes it possible to:

- Rerun the same search at any time to update the resulting asset list.
- Modify the search criteria and rerun the search.
- Receive notification by email of new or modified assets.

Model Based Search Criteria

Model based search criteria consists of searches that reference one or more of the classifiers available in your library assets. A search is run when you click on a search link within your reference model. This type of search differs from an asset query only in the method used to populate the search criteria.

In order for an asset to be included in the model based search result list when the model based search is run, it must match the classification criteria.

Reference Model

A reference model provides a visual representation of functionality for a particular domain of interest to library users. Each reference model incorporates hot spots into its graphic representations or textual lists for the purpose of supporting user navigation and also the triggering of asset searches. These model-based asset searches result in a list of assets that are associated with the portion of the model selected by the user. Through use of a reference model, an Asset User can quickly and intuitively navigate to the portion of the model that relates to desired functionality, and discover the assets pertaining to the functionality represented.

Your library can have one or more reference models. Each reference model is established to describe the functionality of a chosen set of assets important to library users. Each reference model can be unique. Reference models are comprised of a domain process model. For example, the process model can be a block diagram, a graphic, a scenario list, etc.

If your active project is associated with one or more reference models, you can use a model based search to find assets for your project.

Specifically, a reference model enables you to select various features you wish to find in library assets. By navigating through the model, you can locate assets which include the features you are looking for.

Reference Model Features

A reference model consists of a process model representing information for a particular domain. The model can consist of a single page or multiple pages. Users navigate through a Reference Model using hot spots that, when selected by a user, cause an action to take place. Hot spot actions may include:

- Navigational links - enabling the user to move from one page of the model to another page of the model.
- Search Triggers - triggers an asset search and results in a list of assets that meet the criteria associated with the hotspot selected. See the **Model Based Search Criteria** section below.

Model Based Search Criteria

Asset searches performed using a Reference Model are implemented by using a type of search known as a c-search. C-search hot spots designate the classifier value(s) used to select the assets to be returned when the hot spot is selected. The classifier values used as criteria can be examined by opening the search properties from the result page.

Edit Asset Classifier Columns

Asset classifier column settings are used to configure the default columns that are shown for assets in an asset list, such as a search result list or a list of assets in progress. This page enables you to add, change, or remove the classifiers selected for displaying assets in asset lists. The classifiers available in the drop-down lists are those defined as required for one or more asset types in your library's Asset Capture Templates.

Library users can override these default settings by configuring their user account or by selecting classifier columns for a search specification.

Edit Asset Classifier Columns page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your Home page.

Profile List

Click on this bread crumb link to display the list of profiles in your library.

Profile Details

Click on this bread crumb link to display the profile you are editing.

To add an additional sort classifier, click on the down arrow next to a sort classifier choice that is currently not set, and select a sort classifier. To remove a sort classifier, click on the down arrow next to the sort classifier to be removed, and change the selection to none, which indicates there is no current selection. To change an entry to use a different sort classifier, click on the down arrow next to a sort classifier choice and change its selection to a different classifier.

Note: If you leave all the classifier settings set to **none**, asset lists will be displayed with the asset type classifier column as the only column in addition to asset name, asset version and asset description.

Buttons

When you are finished selecting the sort classifiers for your profile, click on the following button of your choice.

- Click on **Save** to record your changes and return to the Profile detail page.
- Click on **Cancel** to return to the Profile detail page without recording any changes.

Custom Search

The Custom Search on your left navigation bar enables you to find published assets. All Users can perform a Custom Search for assets and persisted searches. You can perform a custom search by clicking the dropdown list, labeled Custom Search, in the consumption section of your left navigation bar and selecting from the list the type of search you wish to run. From the Advanced Search popup, you can find assets by entering search criteria and clicking the **Search** button. If you are a Usage Controller, you can also choose to search for Administrative Items.

From this page you can:

- Search for assets using a custom search
- See what elements are searched for each custom search type
- Search for other information than just assets

Searching for Assets with the Custom Search

One way to search for assets or other information in your library is by conducting a Custom Search. Using the Custom Search in the consumption section of your left navigation bar produces search results in the center pane based on the type of search you select and the search string you enter. A custom search is not persisted unless you choose to do so. The search type selected for the search determines which asset elements will be searched for the criteria provided and may designate explicit search targets within assets and their artifacts. Each search term is expressed as a character string and may represent a full or partial match to what is expected in the assets or asset artifacts. Depending on your library's search configuration, each custom search type may have one or more search criteria options.

Performing a Search

Select a custom search type from the dropdown to open an Advanced Search popup. See Custom Search Types for more information about each type of custom search.

Advanced Search Popup Criteria

From the Advanced Search popup select or enter any additional search criteria (some of the criteria boxes may be required) and click the **Search** button. By clicking the **Search** button the query will be run and display the search results in the main content window.

- See Search Results page for more information about refining you search criteria.
- See the Asset Query Specification page for information about persisting a search.
- See Advanced Query Criteria for more information about search types, criteria types, search strings and conditional operators.
- See your Library Administrator for more information on the custom search type configuration of your library.

Custom Search Types

By default your library may have the following five custom searches. Your library may have additional custom searches to pick from. See your Library Administrator for more information about creating custom searches.

- Asset by Content (includes asset name, version, description, overview, classifier values, text content of asset artifacts)
- Asset by Name
- Asset by Keyword (the values for Keyword classifiers)
- Services by Operation (search for service assets by looking at their operation names in the assets

wsdl artifacts)

- Searches (saved search names)

Asset Elements Searched

A Custom Search will return a list of published assets available for any of the following asset elements for each custom search type:

Asset by Content

See Advanced Query Criteria for more information about Asset by Content search types.

Asset by Name

See Advanced Query Criteria for more information about Asset by Name search types.

Asset by Keyword

See Advanced Query Criteria for more information about Asset by Keyword search types.

Services by Operation

See Advanced Query Criteria for more information about Services by Operation search types.

Other Elements Searched

A Custom Search will return a list of other items for the following custom search type:

Searches

A search for "Searches" will return a list of saved asset queries that have been created for your projects. This list is not limited to your active project. The result list will be limited to those searches whose name includes the text string you have entered, if you have included a text string. If you do not include a text string in your search, all of your searches are included in this list. The resulting search list page will display the name, description, and last modified date for the searches that satisfy your parameters. See Search List for more information about viewing saved asset queries.

Your library may have additional custom searches to pick from. See your Library Administrator for more information about creating custom searches.

Using the Custom Search for Administration

If you have the role of Usage Controller, your custom search will offer administrative items as well as the searches described above for assets and searches. See Administration for more information about administrative items.

Asset Views

Searching on this item from the Custom Search displays a list of all the asset views that have names that meet the search string criteria. See Asset View list page for more information about asset views.

Groups

Searching on this item from the Custom Search displays a list of all the groups (both project and non-project) that have names that meet the search string criteria. See List Organizational Groups page for more information about groups.

Profiles

Searching on this item from the Custom Search displays a list of all the profiles in the library that have names that meet the search string criteria. See Profile List page for more information about Profiles.

Quick Search for Published Assets

This page describes where and how to use the quick search for published assets. The quick search pane is only available when viewing and editing assets, and is hidden by default.

From this page you can:

- See how to open the quick search pane
- Learn the search controls used for the quick search

Opening the Quick Search pane

The quick search pane is located on the right side of the main content window, and is only available when viewing and editing an asset. When the quick search pane is visible, you can find it on the right side of your browser window. If the quick search pane is hidden, move your mouse cursor to the far right side of the browser window next to the outside border around the asset content, until you reach a thin vertical line near the edge of the window. When you move your mouse over the vertical line, the mouse shape will change to a "move" cursor, allowing you to drag the vertical line to the left. This will make the quick search pane appear. The quick search will now be visible each time you view published assets during your login session, until you make the search pane smaller by dragging the edge of the pane back to the right side of the window.

Working with the Quick Search

The quick search pane contains the following options:

Text search - Using the text search box, you can find published assets by entering a search string.

Asset Type - Using the asset type dropdown list, you can find published assets by looking for assets of the specified type.

Search button - Click the **Search** button to generate a list of published assets that match the search criteria.

Result List

Your search results are presented in a list. The columns shown for each asset includes the asset name and version. Additional columns of information may be included for the asset, depending on your Account Settings and your library configuration.

You can click on the column header to sort the assets. You can also rearrange the columns by dragging and dropping the column header to a new location in the header row. Use the controls made available by hovering on the column heading and clicking the down arrow at the end of the column header, then selecting sort order from the menu provided. You can also remove a column from the display using this same menu.

Each asset name in the list is linked to provide easy access to opening the asset's information in an Asset Popup window. You can also right-click on an asset to perform additional operations, including:

- Show in Existing Snapshot Window - display the asset information for the selected asset in a an existing asset snapshot window.
- Show in New Snapshot Window - display the asset information for the selected asset in a new asset snapshot window.
- Add to Working Set - add the selected asset to the asset working set. After assets have been added to the working set, you can perform actions against them using the Asset Working Set dialog.

Quick Search for Assets in Progress

This page describes where and how to use the quick search for assets in progress. The quick search pane is only available when viewing and editing assets, and is hidden by default.

From this page you can:

- See how to open the quick search pane
- Learn the search controls used for the quick search

Opening the Quick Search pane

The quick search pane is located on the right side of the main content window, and is only available when viewing and editing an asset. When the quick search pane is visible, you can find it on the right side of your browser window. If the quick search pane is hidden, move your mouse cursor to the far right side of the browser window next to the outside border around the asset content, until you reach a thin vertical line near the edge of the window. When you move your mouse over the vertical line, the mouse shape will change to a "move" cursor, allowing you to drag the vertical line to the left. This will make the quick search pane appear. The quick search will now be visible each time you view assets in progress during your login session, until you make the search pane smaller by dragging the edge of the pane back to the right side of the window.

Working with the Quick Search

The quick search pane contains the following options:

> **Text search** - Using the text search box, you can find assets in progress by entering a search string.
>
> **Asset Type** - Using the asset type dropdown list, you can find assets in progress by looking for assets of the specified type.
>
> **Search button** - Click the **Search** button to generate a list of assets in progress that match the search criteria.

Result List

Your search results are presented in a list. The columns shown for each asset includes the asset name and version. Additional columns of information may be included for the asset, depending on your Account Settings and your library configuration.

You can click on the column header to sort the assets. You can also rearrange the columns by dragging and dropping the column header to a new location in the header row. Use the controls made available by hovering on the column heading and clicking the down arrow at the end of the column header, then selecting sort order from the menu provided. You can also remove a column from the display using this same menu.

Each asset name in the list is linked to provide easy access to opening the asset's information in an Asset in Progress Popup. You can also right-click on an asset to perform additional operations, including:

- Show in Existing Snapshot Window - display the asset information for the selected asset in a an existing asset snapshot window.
- Show in New Snapshot Window - display the asset information for the selected asset in a new asset snapshot window.

Advanced Query Criteria

There are four primary ways to find library assets that have been published: Asset Tree, Search Box, Asset Query, and Model Based Search. Each of these search methods are distinguished by the type of search conducted and the type of search criteria that can be used.

From this page you can:

- Get specific information about search types and what elements are searched
- How to use classification criteria in your search
- See what search strings and conditional operators are available for searches

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Search Types

Search types available are defined by your library configuration. By default, searches for Asset by Content, Asset by Name, Asset by Keyword and Services by Operation are provided. Your library may include additional types of searches and may or may not include the four default types as described.

Asset by Content

Running an Asset by Content search will return a list of assets available to your project which include a match to the search string in one or more of the following asset elements:

- Asset Name
- Asset Version
- Asset Description
- Asset Overview
- Any Classifier Value
- Searchable Artifacts (See your Library Administrator for information about the asset artifacts that are searchable in your library.)

Note: If you do not include a character string in your search, all assets that are available to your project are included in this list.

Asset by Name

An Asset by Name search type will return a list of assets available to your project which include a match to the search string in the asset name.

Note: If you do not include a character string in your search, all assets that are available to your project are included in this list.

Asset by Keyword

An Asset by Keyword search will return a list of assets available to your project which have a keyword that exactly matches the text string given.

Note: Keyword searches differ from the other two asset search types described in the following ways:

- If you enter two tokens in the search string, and one of the tokens matches a keyword or a single word in a two word keyword, the asset in question is returned.
- When entering only one token in a search string, if the token matches one of the words in a two word keyword value, the asset is returned.
- Partial string searches must use a wildcard character (* or ?) in order to match a specified asset.

For example, entering the following search strings for an Asset by Keyword search in a library which has an asset named *EuroDisplay Commerce Server 2000* which has three key words: *convert, money, commerce server*

- **convert money** - EuroDisplay Commerce Server 2000 will be returned in the result list.
- **commerce test** - EuroDisplay Commerce Server 2000 will be returned in the result list.
- **convert** - EuroDisplay Commerce Server 2000 will be returned in the result list.
- **commerce server** - EuroDisplay Commerce Server 2000 will be returned in the result list.
- **test** - EuroDisplay Commerce Server 2000 will not be returned in the result list.

Note: If you do not include a text string in your keyword search, all assets in view for the active project will be included in the result list.

Services by Operation

Running a Services by Operation search will search for service assets by looking at operation names in the assets wsdl artifacts.

Search Criteria

Depending on your search method, search criteria may consist of search string criteria, classification criteria, search types or all search criteria. When two or more type of criteria are included for a search, assets must meet the conditions of all to be included in the search result.

- Asset Tree - Classifier values only
- Search Box Search - Search String only
- Asset Query - Classifier values and Search String (either or both)
- Model Based Search - Classifier Values designated by reference model navigation

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Classification Criteria

Entering a value for a classifier as query criteria designates that result assets must include a classifier value that matches.

- Entering a full or partial character string for a classifier search criteria will designate that library assets that include this string in one of their corresponding classifier value will be considered a match. Partial text strings must include wildcard characters (* or ?).
  Note: Numeric, Boolean and Date classifier types require values that are an exact match.
- If more than one asset classifier value is included for your query, all classifier values must be matched in order for an asset to be found by the search. In other words, when you specify multiple values for multiple classifiers, these criteria are considered in an "AND" type of relationship to each other. Conversely, if you enter more than one classifier value for the same classifier, these values are considered to be in an "OR" condition. For example, any asset that matches either of two values given as criteria for a classifier will be included in the result set of the search.

Working with Compound Classifiers as Search Criteria

You may establish classification criteria using classifiers defined as compound. A compound classifier is one that is comprised of two or more fields of information related in a designated order.

For example, a compound classifier named "financial-software" may be comprised of the following fields: fs-vendor, fs-package, and fs-version. To establish query criteria using this example classifier, you could:

- Designate a value for all three fields. This means assets resulting from the search must contain these three specific values for each of the corresponding fields in their financial-software classifier metadata.

- Designate a value for fs-vendor only. This means assets resulting from the search must contain the fs-vendor value plus any values for fs-package and fs-version. In other words, a wild card is assumed for any trailing fields for which you do not designate a specific value.

Note: Assets which have only partial values in a compound classifier (that is, one or more of the trailing fields have been left blank) will only match classification criteria that have wildcards for those values. They will not match assets whose field values for the classifier have been specifically designated.

Working with Date Classifiers as Search Criteria

Date classifier values must be an exact match.

Working with Numeric Classifiers as Search Criteria

Numeric classifier values must be an exact match.

Working with Boolean Classifiers as Search Criteria

Boolean classifier values must be an exact match.

Working with Predetermined Pick list Classifiers as Search Criteria

You may be offered a dropdown list of classifiers. Select the value(s) from the list.

Search String Criteria

A search string included with your asset query may be used to match your choice of one of the following, as determined by the type of search selected:

- Asset Content (includes asset name, version, description, overview, classifier values, text content of asset artifacts)
- Asset Name
- Asset by Keyword (the values for Keyword classifiers)
- Other (Your library may offer other types of searches)

Conditional Operators

Your library may allow the following conditional operators to be used.

- **"double quotes"** - used to query assets with exact match
- **AND** - used to query asset with both strings
- **OR** - used to query assets with either string
- **NOT** - used to query assets that do not contain a string
- **asterisk*** - represents a search for any value, consisting of one or more characters
- **?** - represents a single character
- **(parentheses)** - used to establish precedence of the strings searched

Creating a Search String

You can include more than one term in a search string along with a conditional operator(s) and sets of parentheses (as needed to establish precedence) in order to accurately depict the condition you are looking for in returned assets.

- The conditional operator of ***OR*** can be used as a binary operator only. Search string terms separated from other strings by a blank space imply an **OR** condition between strings, which means if either or any of the terms provided result in a match in an asset, the asset is included in the search result. If a term in your search string is to include an embedded blank, you must enclose the term in **"double quotes"**.

- **tax federal** -> valid search string which will return all assets that contain either tax or federal or both
- **tax or federal** -> valid search string which will return all assets that contain either tax or federal or both
- **"tax or federal"** -> valid search string (single term) which will only return assets that contain an exact match to the string *tax or federal*
- **tax or fed*** -> valid search string which will return all assets that contain either tax or federal or federation
- **medic???** -> valid search string which will return all assets that contain either medicine or medication
- **?** -> an example search string that would find all non-null values
- **or federal** -> invalid search string which will result in no assets matched (even when there are assets that include *federal* in their content

- The conditional operator of ***AND*** can be used as a binary operator only. Search string terms separated from other terms by the word **AND** signifies the *and* condition applies, which means that only assets that contain a match to both or all terms included will be returned in the search result.
    - **tax and federal** -> valid search string which will return all assets that contain both tax and federal
    - **"tax and federal"** -> valid search string (single term) which will only return assets that contain an exact match to the string *tax and federal*
    - **tax and fed*** -> valid search string which will return all assets that contain either tax and federal or tax and federation
    - **and federal** -> invalid term which will result in no assets matched (even when there are assets that include *federal* in their content)
- The conditional operator of ***NOT*** can be used as a binary operator only
    - **tax not federal** -> this is a valid search term which returns assets that contain *tax* and do not contain *federal* in their content
    - **not federal** -> this is an invalid term which will result in no assets matched (even when there are assets that do not include federal in their content)
- When **(parentheses)** are not used to establish order of precedence: *NOT* has first order of precedence, *AND* has second and *OR* is last
    - **(web or service) and device** -> *web or service* - takes precedence because of the **(parentheses)**
    - **web or (service and device)** -> is the same as - *web or service and device* - because **AND** takes precedence before **OR**

Researching and Acquiring Assets

A primary activity supported by your library is the ability to search for and find assets that may be useful to you in your development work. The ability to research and acquire assets published to your library is available to all library users. In some cases you may find that an asset has been configured to repress the option to be acquired. See asset information for more information.

Researching an Asset

Once you find an asset that may be of interest, you can research the asset to learn more about it by:

- Examining information provided in the asset's overview, artifacts, classifiers and properties.
- Exploring the links to assets related to this asset
- Examining the asset's XML
- Discussing this asset with other library users by using the asset's discussion forum.

Acquiring an Asset

When you decide to use an asset your organizational policies may require you to make this request. This is termed "requesting the acquisition" of an asset. See About Asset Acquisition and Acquiring Assets for more information.

Asset Information

Library assets are comprised of a set of information about an entity represented. This information includes:

- Header information - including identifiers, such as asset name, version and description as well as supplemental information on the asset's type, subscription status, business domain classification, lifecycle status and whether there are active changes pending on the asset information
- Overview - an expanded description of the asset
- Attributes - categories of asset information
    - Asset Context - information about the asset provided by the application
    - Classifiers - a type of asset metadata that consists of a set of name/value pairs describing various attributes of the asset
    - Artifacts - a type of asset metadata that may consist of a combination of files, references to asset information provided outside the application, and text descriptions corresponding to artifact type
- Relationships - a set of described links to other assets which are related in some way to the asset you are viewing
- Comments - comments submitted by users of the library about this asset

Viewing Asset Information

You can display information about an asset in an Asset Information page or an Asset Popup Window by clicking on an asset name link. You can gain access to the asset's name link through various means, such as by locating the asset in the asset tree of your left navigation bar, by performing a search from the Search Box, by clicking on the name link of a related asset or by creating and running an asset query. Depending on where the asset link is provided determines whether the full asset information page is displayed or if a snapshot of the asset is provided in a popup window.

The classifiers, artifacts and relationships displayed on an asset information page will vary by asset type and lifecycle status. In addition, these may be also determined by your role assignments. If your library is configured to offer role-based asset presentation, the asset information you see and the order in which it is presented within each asset information section may be configured specifically for your assigned roles. When role-based asset presentation is used:

- The project you have active at the time the asset information page is displayed will provide a default view. You can set the default view used for each of your projects by going to the project detail page from the corresponding link on your left navigation bar when the project is active.
- If you have multiple roles, your **Current View** will provide a drop-down list that includes the role-specific views available to you. You can switch between views by selecting a new view from the list. If you select "Default View," you will see the asset information established for non-role-specific presentation. If you select "Show All," you will see the asset information associated with the Default View as well as the asset information associated with all role-specific views in the list.

View Asset Information

This page provides a complete view of information about an asset published into your library. In addition, a number of links are included to provide access to additional information related to the asset and to enable you to perform various actions. Please see Asset Metadata Display for information regarding the metadata included in your view of the asset.

You can display asset information by clicking on an asset link provided in the Asset Tree of your left navigation bar, Quick Search results or in a search result list.

Click on the following topics to learn more about the information provided on this page:

Asset Information Page Header

Asset Information Page Links

Overview

Attributes

Asset Context

Artifacts

Classifiers

Relationships

Comments

Asset Metadata Display

Quick Search

Asset Information page Contents

This page contains the following links and asset information and selections.

Asset Information Page Header

These items are displayed for the asset in the header section of this page:

- Asset Name and Version
- Description - a brief description of the asset
- Asset Type - the value of the asset type classifier
- Subscription Status - the current status of your subscription to this selected asset. You are currently either subscribed to this asset or not. This item includes an action link to either **[Subscribe]** or **[Unsubscribe]** depending on your current subscription status. For example, if you are currently subscribed to this asset, the Subscription status will be *Subscribed* and the link will be **[Unsubscribe]**. Click **[Unsubscribe]** to remove your subscription from this asset. Note: when viewing asset information from the Asset Popup window, the Subscription Status is shown in the Asset Context section instead of the header section, and the [Subscribe] and [Unsubscribe] links are not available.
- Status – a field showing the lifecycle status of the asset. This field could be named differently depending on the configuration of your library. Note: when viewing asset information from the Asset Popup window, the status is shown in the Asset Context section instead of the header section.
- Active Changes - a current status of changes pending for this asset. This status is provided by the application and is shown to all users. Note: when viewing asset information from the Asset Popup window, the Active Changes status is shown in the Asset Context section instead of the

header section.

One of four status values will be displayed.

- None - no changes have been made to the asset in progress since the asset was last published.
- Changes Pending - changes have been made to the asset in progress; the asset has not yet been submitted for republish.
- Changes Submitted - changes have been made to the asset in progress; the asset has been submitted for publish. The submission request is pending approval. If you are the one who submitted this asset for publish, you are provided a link to the details page of the submission request.
- Deletion Requested - an Asset Capture Engineer has requested that this asset be deleted from the asset source and your library. The deletion request is pending approval.

- Additional Information - depending on the default configuration or your settings, there could be additional information shown. Additional information depends on the classifier columns for asset lists settings in Manage my Account.

Asset Information Page Links

The links shown on the Asset Information page include the predefined and custom user actions configured for your library. Depending on your library configuration, an item may display as a link directly on the Asset Information page, or it may be shown as an option under the [More Actions] link. A Library Administrator typically configures the user actions so that the most commonly-used options are shown as links directly on the page, and the less commonly-used options are shown as links on the [More Actions] menu.

Home

Click on this bread crumb link on the top left side of this page to display your home page.

Current View

If your library is configured to provide alternative views of asset information, you will have a Current View box in the upper right hand corner of the asset information display. The value shown in the Current View box controls the asset detail view in effect for your asset information page. The view or views available to you are based on the roles you are assigned for the project you have active when you display this page. If you have multiple roles, your **Current View** will provide a drop-down list that includes the role-specific views available to you. You can switch between views by selecting a new view from the list. If you select "Default View," you will see the asset information established for non-role-specific presentation. If you select "Show All," you will see the asset information associated with the Default View as well as the asset information associated with all role-specific views in the list.

Until you select a view from this list for the first time, your current view is set to the "Default Asset Details View" provided for your active project. You can change your default asset details view for this project by taking the link to the project detail page provided on your left navigation bar when the project is active. See Project Detail page for more information.

[Acquire]

Click on this link to initiate a request to acquire this asset. Before clicking acquire, be sure you have the intended "active" project and "active" asset (if applicable) selected. You can view or change your current active project and asset in the consumption section of your left navigation bar. If this asset has previously been requested for acquisition by your currently active project, you can view the status of this request on the project's detail page. See About Asset Acquisition for more information.

Your asset information page may or may not include this link. In addition, the placement of the **[Acquire]** link on this page is determined by your library's acquisition mode configuration. See your Library Administrator for more information.

[Edit]

Clicking on **[Edit]** results in the display of the asset in progress corresponding to this published asset and provides the means to modify the asset in the asset source. The asset becomes locked for your edit purposes. If any other Asset Capture Engineer is currently working with this asset, the "Edit Availability" of the asset is shown as "Not Available" and you will not be able to edit the asset until the other user has unlocked it.

The **Edit** link is only available to you if you are an Asset Capture Engineer responsible for creating and updating this asset's information.

[Create New Version]

Click on this link to create a new asset in progress to represent the new version of this published asset. With this action you are transferred to the Edit Asset page for the new asset. The new asset will be named with the same name as the original asset, but with an incremented version designation. You will need to provide the correct version number, according to your convention.

The new asset in progress will automatically be populated with metadata according to the asset template used for creating a new version of this asset. In addition, the new version asset will have a predecessor relationship added to show a relationship back to your original asset. You can edit this asset as necessary before submitting it for publish.

Like the **Edit** link, the **Create New Version** link is only available to you if you are an Asset Capture Engineer responsible for creating and updating this asset's information and if supported by the configuration of your installation. See your Library Administrator for more information.

[Create Like]

Click on this link to create a new asset in progress that will be similar to the existing asset. With this action you are transferred to the Edit Asset page for the new asset. The new asset will be named with the same name as the original asset, but with a "Copy of" at the front of the asset name. You will need to provide the correct asset name, according to your convention.

The new asset in progress will automatically be populated with metadata according to the asset template used for creating a new copy of this asset (see your Library Administrator for more information). In addition, the new asset will have relationships removed as well as other key classifiers and artifacts depending on the asset template. You can edit this asset as necessary before submitting it for publish.

Like the **Edit** and **Create New Version** links described above, the **Create Like** link is only available to you if you are an Asset Capture Engineer responsible for creating and updating asset information and if supported by the configuration of your installation. See your Library Administrator for more information.

[Show Metrics]

Click on this link to display metric information for this asset, such as how many projects have acquired the asset and how many users are subscribed to it.

The **Show Metrics** link is only available if supported by the configuration of your installation. See your Library Administrator for more information.

[Show Contacts]

Click on this link to display the contacts that are associated with your asset. This link is only shown if the asset contains one or more contacts. Contacts are added to an asset by a user with the Publisher role by using the Edit Publish Information page.

[View Requests]

Click this link to display the Asset Request page. From this page you can click the **[Details]** link to view asset requests. See Request Details page for more information about requests.

[Discuss]

Click on this link to display the Asset Forum page for discussion topics on this asset. The forum page enables you to view existing topics and replies, post a new message(topic or reply) or search the forum for existing messages concerning the current asset. Forum topics may include Publication Notes, Usage Questions, Feedback, New Requirements, FAQ and others, for example. For more information, see Asset

Discussions.

[Edit Publish Information]

This link is provided if you are assigned the Publisher role and are responsible for this asset's publish information. Click on this link to display the Edit Publish Information page for this asset.

[Email]

Click on this link to open your default email client and send an URL link for the published asset by email. The person receiving the link must have access to the library the asset is located to display the asset from the email link provided.

[Print]

Click on this link to display a printer-friendly view of the asset information in a new browser window.

[Show Relationship Tree]

Click on this link to display an asset relationship tree view including a hierarchical listing of assets related to the asset you are viewing. This view is provided in a new popup window. See Asset Relationship Tree for more information.

[Visualize]

Click on this link to display a graphical Asset Relationship Visualization (ARV) view which will display in a new browser window. The Asset Relationship Visualization provides you the capability to view assets in your library that are related to the asset you are interested in. See Asset Relationship Visualization for more information.

[Add to Working Set]

Click on this link to add the asset to your asset working set. The asset working set is a list of assets that are grouped together for the purpose of later performing actions against them.

[Show XML]

Click on this link to display the asset's XML file in a new browser window. The **Show XML** link is only available if you have the role of Usage Controller, and if your library configuration includes the definition for this custom user action.

[Show Changes]

Click on this link to display the change history for the asset as a text document in a new browser window. The **Show Changes** link is only available if you have the role of Usage Controller, and if your library configuration includes the definition for this custom user action. User-defined metadata changes are not shown as differences.

[Return to Parent]

This link allows you to return to your original asset in cases where you are currently viewing a related asset you pulled into the primary view from a popup window.

[More Actions]

This link displays a menu with links to user actions your Library Administrator configured for display on the secondary menu.

Overview

Click the + or - icon to expand or collapse this section.

This section provides a view of the asset overview. The overview of an asset may provide an expanded description of the asset.

Attributes

Click the + or - icon to expand or collapse this section as a whole.

The Attributes section provides access to the display of Asset Context information, Classifiers and Artifacts. Much of the information described below also applies to the information displayed from the Asset Popup Window, with differences noted.

Asset Context

Click the + or - icon to expand or collapse this section.

Contextual information is provided by the application. Note that some or all of the items listed will be included, depending on the configuration of your library and whether you are viewing context information from the Asset Information page or the Asset Popup window.

- Status - when viewing asset information from the Asset Popup window, Status is shown in the Asset context section. The Asset Information Page shows Status in the header section of the page.
- Asset Source - indicates the asset's owning repository. An asset may originate in your library, or it may come from another library that is visible to yours. See Assets in Other Libraries for more information.
- Created - the date this asset was originally created in the asset source.
- Last Published - the date this asset was last published to this library.
- Submitter - the user name of the individual who last submitted this asset for publish to the library. If the asset was published to your library as a result of running an automation script or is an asset from an external library, the Submitter may be identified as "Repository Application" instead of a standard user account.
    - If the asset's submission for publish was associated with a governance process and required approval, a **[Submission Details]**link is provided to the corresponding submission request.
- Publisher - the name of the person that last published this asset. If the asset was published automatically, you will see a message to that effect.
    - An **[Edit Publish Information]** link is also provided if you are assigned the Publisher role and are responsible for this asset's publish information. Click on this link to display the Edit Publish Information page for this asset.
- Cross Charge Amount - the amount to be used as a default amount for cross-charge when this asset is registered to a project. Optionally, this amount can be used as information regarding the amount to be credited to the organizational group owning this asset.
- Owning Group - the name of the library group having ownership responsibility for this asset. For example, Asset Capture Engineers assigned to the owning group will see this asset in their assets in progress lists and Publishers responsible for this group will see the **[Edit Publish Information]** link on the asset's information page.
- Project Context - If your library is configured to enable asset-based acquisition, an asset may have a project assigned as its "project context." Project context is used to determine the project associated with asset acquisitions made by this asset. See About Asset Acquisition for more information.
- Edit Availability - This item provides facts about the status of the asset in progress, a status field that reflects whether or not this asset is currently available for edit. Note: Edit Availability is only shown if you are an Asset Capture Engineer responsible for this asset.
    - If the asset is not currently locked, the status will be "available."
    - If it is currently locked by an Asset Capture Engineer, this field will show "Locked by" followed by the locking user's name. This will be your name if you are currently working on the asset. The user name provides a link to generate an email to the locking user.
    - If the asset is provided to your library from an external source, the status will reflect that this is an external asset.
- Active Changes - when viewing asset information from the Asset Popup window, the Active

Changes status is shown in the Asset context section. The Asset Information Page shows Active Changes in the header section of the page.

- Acquisition Status - If your library is configured to enable project-based acquisition, the Acquisition Status field is present. One or more of the following will be displayed depending on the status of the acquisition.
  - **[Acquire]** - Click on this link to initiate a request to acquire this asset. Before clicking acquire, be sure you have the intended "active" project (if applicable) selected. You can view or change your current active project in the consumption section of your left navigation bar. If this asset has previously been requested for acquisition by your currently active project, you can view the status of this request on the project's detail page. See About Asset Acquisition for more information.
  - Pending Approval - A *Pending Approval* status provides an active link to the corresponding Request. Once the request receives approval or is rejected, the asset is shown as registered to the project (if the asset acquisition request is approved) or the asset attachment is removed from the project (if the acquisition request is rejected).
  - Registered - When the request becomes fully approved, the asset is registered to the requester's active project. Click the **Registered** active link to view the Asset Acquisition Details popup.
  - **[Details] -** If registered, a **[Details]** link is provided to access the context page of the asset acquisition.
- Subscription Status - when viewing asset information from the Asset Popup window, the Subscription Status is shown in the Asset context section. The Asset Information Page shows Subscription Status in the header section of the page.

Classifiers

Click the + or - icon to expand or collapse this section.

This section displays the classifier values associated with this asset. The information for each classifier includes its name and one or more corresponding Values. If there is more than one instance for a single classifier type, the values are displayed on a separate line. A single value for a compound classifier (a classifier with multiple fields included) displays with each field value separated by the | symbol.

[Show All]

The [Show All] link, if available, provides a way for you to view all classifiers, including the classifiers that have been designated for non-primary display for this asset. Click the **[Show Only Primary]** link to view only primary classifiers. In addition, your library may designate other classifiers for non-primary display. See your Library Administrator for more information.

Artifacts

Click the + or - icon to expand or collapse this section.

This section displays artifacts included with this asset. Information for each artifact includes its name and value. Artifacts are grouped by artifact category. Depending on the form (containment) of the artifact, its value will either consist of the name of a file (if it is a *by-value* artifact), a URL or other source path (if it is a *by-reference* artifact), or text (if it is a *by-description* artifact).

Viewing and Downloading Artifacts

By-value or by-reference artifacts provide a link to the artifact itself, unless the artifact is designated as *private* (see below). By clicking on an artifact link you are provided means to view and potentially download the artifact. If the artifact consists of a set of html pages with an index, opening it may open a launch page into a browser window.

Artifact Source

By-reference artifacts provide a reference which uses either a standard protocol or a specific protocol defined to link to an external system, such as a source code management system available to your library. Artifacts using a specific protocol have a reference path starting with SOA:// instead of the standard http://. See your Library Administrator for more information about custom artifact sources defined for your library.

Private Artifacts

Asset artifacts listed in the artifact section of a published asset may or may not offer a link to the artifact. The presence or absence of a link depends on whether or not the artifact has been designated as a *private* artifact and whether or not the asset has been acquired by (registered to) your active project. When an asset is not currently registered to your active project, its artifacts are not available to view or download if they have been designated as *private* artifacts in the asset's publish information. However, private artifacts will become available upon the registration of the asset to your active project.

Email Artifacts

Email artifacts, if configured in your library, require special processing that is different from other artifact types. For more information, see Email Artifacts.

[Show All]

The [Show All] link, if available, provides a way for you to view all artifacts, including the artifacts that have been designated for non-primary display for this asset. Click the **[Show Only Primary]** link to view only primary artifacts. In addition, your library may designate other artifacts for non-primary display. See your Library Administrator for more information.

Relationships

Click the + or - icon to expand or collapse this section as a whole.

This section displays information about the assets related to the asset you are viewing. Information for each relationship includes the relationship type, asset type icon, related asset's name, and version. For contextual relationships (acquired relationships), the information may include the acquisition status icon, relationship properties icon and the **[View Changes]** link.

Show All button

The [Show All] button, if available, provides a way for you to view all relationships, including the relationships that have been designated for non-primary display for this asset. Click the **Show Only Primary** button to view only primary relationships. In addition, your library may designate other relationships for non-primary display. See your Library Administrator for more information.

Viewing Related Assets

Related assets are grouped by relationship type. Within a group, each related asset name is linked to provide easy access to opening its information page in an Asset Popup window. As an alternative means, you can also right mouse click on the related asset to display a context menu offering the options to: **Show in Existing Snapshot Window, Show in a New Snapshot Window** or **Load Asset into Main Page**. Note: additional columns of information may be included for the asset depending on your Account Settings and your library configuration. In addition, these columns can be rearranged by dragging and dropping the column header to a new location in the header row.

About Asset Relationships

- **Relationship Source and Target** - Each asset relationship is established in the metadata of the "source" asset. The relationship identifies the asset that is the "target" of the relationship. The name of the relationship is displayed in the Relationships section of the source asset. In addition, the asset information of the target asset will show a relationship back to the source asset. This "reverse relationship" view of the asset may use a different name for the relationship indicating its direction. The reverse relationship is only shown on published assets; it is not included in the asset metadata for an asset in progress. This reverse relationship feature enables you to easily navigate to assets related to the asset you are viewing. In addition, Asset relationships can be displayed graphically through use of Asset Relationship Visualization.

- **Context-enabled Relationships** - Some relationship may include contextual information. These are called "context-enabled" relationships and are primarily used when a consumption relationship is established between two assets. A context enabled relationship is unique in that it provides additional icons with information about the acquisition (for example) and relationship properties:

  Acquisition Status icon - The Acquisition Status Icon shows details about the acquisition status and provides a means of displaying the request details page associated with the acquisition. Hover over the Acquisition Status Icon and a tool tip will appear showing the current acquisition status, project and acquisition properties. Click the Acquisition Status Icon to display a Asset Acquisition Request Details popup. The resulting page displayed shows the Asset Acquisition Details or the Asset Revocation Request Details popup. See About Asset Acquisition for more information.

- If you or another user on the currently active project have requested this asset be acquired, the status shows whether the request is pending approval or if the approval process has been completed. In this later case, if the request is fully approved, the status will show as *Approved* in the Asset Acquisition Details popup window.
- If a revocation request is pending approval, the Asset Revocation Request Details popup window status shows "Pending Approval" until the revocation reaches full approval.
- If a request to revoke the registration of the asset reaches full approval, the asset is no longer registered to the acquiring asset or the acquiring project. The acquisition relationship remains with the asset and provides a link to the relationship context page.

Relationship Properties icon - Relationship Properties Icon shows the relationship status and provides a means of displaying relationship properties and other information on a relationship context details page. Hover over the Relationship Properties Icon and a tool tip will show the relationship status, and relationship properties between the consumed and consuming asset.

- **View Changes Between Two Related Assets** - There are two relationship types that offer you the ability to view a comparison of asset information between the asset you are viewing and a related asset. These relationship types are "Predecessor" and "Successor." In cases where there is more than one version of an asset, the asset information for each version will contain links to either a related predecessor, a related successor or both in the Relationship section. Clicking on the **[View Changes]** link corresponding to a predecessor or successor asset will open a browser window showing asset differences. Additions, modifications or removals of asset metadata are displayed in sections corresponding to metadata types: identifier, artifacts, relationships and classifiers. Asset information that has not changed is not included in the differences window, though it remains displayed in the original browser window. User-defined metadata changes are not shown as differences.
    - In some cases where by-value artifacts are modified, the asset differences information will include a **[File Differences]** link. This link is available in the Artifacts > Modified section for the changed artifact. It enables you to display specific file differences in addition to the "old value" and "new value" file links. The **[File Differences]** link is available when the mime type of the modified artifact is either XML or a type corresponding to an artifact comparator defined in your library's configuration. See your Library Administrator for more information about displaying changes to asset artifacts.

Comments

Click the + or - icon to expand or collapse this section as a whole.

This section displays comments entered by users. Comments are organized by who submitted the comment and when the comment was submitted.

Comments can be added to an asset directly on this page by clicking the **green + icon**. Add your comment to the asset using the resulting dialog.

Asset Metadata Display

Your library may be configured for role-specific asset presentation. If so, the roles you are assigned for your active project will determine the set of asset information views available to choose from to display asset information. Please see your Library Administrator for more information about your library's configuration for role-based asset presentation. If your library is not configured for role-specific asset presentation, all metadata elements are viewed by all users regardless of role assignment.

When role-based metadata views are used:

- The default asset view used to display asset information is determined by the "Default Asset Details View" you have designated for your current active project. Set the default view to be used for each of your projects by going to their corresponding project detail page from the link made available in the Consumption section of the left navigation bar when the project is active.
- If you have multiple role assignments for your active project, you can elect to switch between the asset detail views corresponding to these roles in order to choose the most useful display. Alternatively, you may choose the "Show All" view, which presents an aggregate of the information provided all library users plus the information included for each of the roles you are assigned.
- Changing your active project may change the asset metadata displayed on your asset information page, if your role assignments differ for the new active project.
- If your library is using role-based asset presentation, and you do not hold any group roles for the project you have active, your asset detail information will be displayed according to a default asset details view configured for your use.

Quick Search

When viewing a published asset, you may find it useful to view other assets at the same time, in a secondary snapshot window. This can be useful, for example, as a way to identify related assets or assets you may wish to establish a relationship with. You can do this by using the Quick Search pane to search for assets while leaving the current asset information in view. While the Quick Search pane is hidden by default, you can make it visible by dragging the edge of the pane to the left while viewing a published asset. For more information, see Quick Search for Published Assets.

View Asset Popup

This page provides a snapshot view of the primary asset metadata and other information about the asset. The asset popup window also provides a number of links enabling you to perform various actions including comparing the asset to another and managing the asset information displayed. A more complete set of asset information is provided in the Asset Information page.

You can display an asset popup window by clicking on an asset link in the related assets section of an asset information page or by using the right-click menu provided for each related asset. Alternatively, you can perform a quick search (from the mechanism offered in the upper right side of an asset information display) and click on an asset link provided in the search result to open a corresponding popup window.

This window contains the following information, icons, and links:

Title Bar

The Title Bar of the Asset Details popup window includes the following:

Asset Name (Version)

The name of the asset displayed and its corresponding version.

Collapse or Expand Icon

This icon displays as either an up or down arrow depending on the window's current condition. Clicking on the icon as an up arrow will collapse a popup that is currently expanded. Clicking on the icon as a down arrow will expand a collapsed popup window.

Compare Icon

Use this icon to open a page showing the differences between the asset in your popup window and the asset in the primary display. The comparison is provided in a new popup window and includes the differences between the assets' Identifiers, Artifacts, Relationships and Classifiers. This icon is only available when there is an asset shown in the primary display.

Load Current Asset into Main Content Window Icon

This icon loads the asset from the popup window into the primary asset information display. The popup window is closed as a result.

More Asset Options Icon

This icon provides you with more operations you can perform with the asset. The operations shown here include the predefined and custom user actions configured for your library. For more information, see the Library Configuration Guide or your Library Administrator.

? (Help) Icon

This icon displays this help page.

X (Close) Icon

The X icon will close the Asset Popup window.

Asset Popup Header

These items are displayed for the asset in the header section of this page:

- Asset Type - the value of the asset type classifier
- Description - a brief description of the asset

Asset Context

Click the up or down arrow icon to expand or collapse this section.

See Asset Context for more information.

Classifiers

Click the up or down arrow icon to expand or collapse this section.

See Asset Classifiers for more information.

Artifacts

Click the up or down arrow icon to expand or collapse this section.

See Asset Artifacts for more information.

Relationships

Click the up or down arrow icon to expand or collapse this section.

See Asset Relationships for more information.

Acquire an Asset for Use

When a development team member determines to use an existing asset for current or new development, he or she may click on the **Acquire** link/icon of the asset to request acquisition of the asset for this development effort. The action to request the use of an asset creates an asset acquisition request. If the request is approved, a formal "registration" of the asset is established to the acquiring project and optionally to an acquiring asset.

The Purpose of Asset Acquisition

Asset acquisition can be used to record the use of an asset by a development effort, or project. In addition, if your library uses asset-based acquisition, asset acquisition can also record the use of an asset by a specific acquiring asset within the context of the project. See Asset Acquisition Mode for more information.

- **Enables Reuse Tracking** - When an asset is acquired for a project, it signifies the occurrence of a reuse transaction and has the effect of incrementing the reuse metrics for the consuming project, for the asset itself and for the asset's owning group.
- **Provides for Reuse Governance** - Asset acquisition requests can be used to trigger a governance process related to the use of an asset by a consuming project. Often the governance process involves approval and information gathering from the Project Manager of the consuming project and also a user representing the interests of the asset's ownership.
- **Establishes Acquisition Relationships** - The relationships established as a result of asset acquisition also provide useful information. Asset requested for acquisition by a project participant are attached to the project. Assets that are fully approved for acquisition by a project are said to be "registered" to the project. In addition, when asset-based acquisition is used assets that acquire other assets are provided with a relationship in their asset metadata representing the acquisition relationship.

Is Asset Acquisition Required?

Asset information is presented in the asset detail page and is accessible to you with or without asset acquisition, with one important exception: the asset may have one or more artifacts that are designated as "private." Private artifacts are listed in the asset's artifact section, but are not available until the asset is fully approved for use with the project you have currently active.

Regardless of whether or not an asset has private artifacts, the operational policies of your organization will dictate if there is a need to request acquisition of an asset you want to use for development. In some cases, asset acquisition is not considered necessary. In fact, depending on your library's configuration, some or all assets may not have the **[Acquire]** link available on the asset detail page.

See your Library Administrator for more information on how asset acquisition is used in your organization.

Asset Acquisition Process Governance

Your library process configuration may have established a governance process for the acquisition of assets. This process may vary by asset type or other asset classifications. If asset acquisition process governance is in place for an asset, an acquisition request will be created and pending request notification will be sent to users with the appropriate approval roles when acquisition is requested. The status of the acquisition request is displayed on the asset detail page of the requested asset and on the acquiring project's detail page in the attachment section. In addition, if asset-based acquisition is used the status of the request is also displayed in the relationship sections of the acquiring asset's detail page and its edit page.

Asset Acquisition Context

Asset acquisition is always recorded on behalf of an acquiring project. This is true whether you are using project-based asset acquisition or asset-based asset acquisition. When asset-based acquisition is used, an acquiring asset is designated in addition to the acquiring project. See Asset Acquisition Context for more information.

See the following for information on how to acquire assets when using each asset acquisition mode:

Acquiring Assets with Project-based Asset Acquisition

Acquiring Assets with Asset-based Asset Acquisition for more information

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Asset Surveys

Please see About Asset Acquisition Surveys for information regarding follow-up for assets acquired for use by a project.

About Configuring Your Library to Support Asset-based Acquisition

Asset Acquisition Mode

Library configuration designates the type(s) of asset acquisition that the library will support, whether project-based, asset-based or both project-based and asset-based. This designation is made by a Library Administrator using the Library Configuration item available on the Support Center and indicating the asset acquisition mode on the resulting Library Configuration detail page.

Asset Acquisition Process Governance

Your library's process configuration determines what processing actions, if any, are triggered by an asset acquisition request. Process configuration is generally maintained through use of the Configuration Designer tool. Please see your Library Administrator for more information about the asset acquisition process configuration in place for your library.

Asset-based Acquisition Library Configuration

If your library's acquisition mode is set to either asset-based acquisition or both asset-based and project-based acquisition, there are additional aspects of library configuration that must be established. These are described in the following sections. If your library supports project-based acquisition only, no further library configuration is necessary.

Defining Asset-based Acquisition Relationship Types

An asset-based acquisition requires the availability of a special type of asset relationship called a "context enabled" relationship. Context enabled relationships provide the ability to create a relationship context for the relationship added to the metadata of the acquiring asset and to expose this context to users viewing the relationship. To configure a relationship to be used with asset-based acquisition, use the Global Definition Template Editor, which is part of the Akana Configuration Designer. Navigate to the **Relationships** section of the template, and either add a new relationship, or click on the relationship you wish to configure. In the Workflow section of your relationship, check "on" the option *This relationship can hold properties*. This marks the relationship as context-enabled.

Next, determine if you wish an acquisition request to trigger a governance flow. Typically, libraries using asset-based acquisition are configured to bypass the governance process during acquisition. To configure this setting, set the *Require governance to publish changes to this relationship* checkbox to "unchecked."

Finally, to ensure that the appropriate context enabled relationships are included in the capture templates used by assets that will acquire other assets, modify the capture template(s) using the Capture Template Editor, which is part of the Akana Configuration Designer. Navigate to the **Relationships** section of the template, and add the relationships you wish to use with asset-based acquisition.

Library Configuration Related to the Republish of the Acquiring Asset

Asset-based acquisition involves the addition of a context enabled relationship instance to the metadata of the acquiring asset. This relationship is added to the asset in progress of the acquiring asset upon submission of the request to acquire an asset. Typically your library configuration should support the immediate republish of the acquiring asset so that the acquisition relationship is visible to all library users in addition to the Asset Capture Engineers who can view the asset in progress, although this is optional. To facilitate immediate publish:

1. Ensure your Library Configuration detail page's **Asset Acquisition Settings** section has "Publish Acquiring Asset On Acquisition Submission" set to "Yes."
2. In your library's Global Definition Template, configure each relationship element that should allow a governance bypass upon submission for publish. See Defining Asset-based Acquisition Relationship Types.
3. Note: immediate publish will only occur if there are no changes to asset metadata elements where governance is required.

If you do not want to trigger an immediate republish of the acquiring asset upon requesting the acquisition of an asset, there is no configuration necessary. The acquisition relationship will be added to the acquiring asset's asset in progress as described. However, the acquiring asset will not be submitted for publish until requested by an Asset Capture Engineer. Only after the republish of the acquiring asset will the acquisition relationship and its status become visible to asset users who are not Asset Capture Engineers for the asset.

Migrating to Asset-based Acquisition from a pre-6.2 Library

If you wish to reconfigure your current library to support asset-based acquisition, you have a choice when designating your library's asset acquisition mode to support:

- asset-based acquisition only (recommended)
- both asset-based and project-based acquisition

It is recommended that you choose to use asset-based acquisition exclusively, unless there is a strong reason to support both modes of asset acquisition. Choosing between asset-based and project-based acquisition allows consistent focus on use of the repository and avoids user confusion.

When you switch your library's asset acquisition mode to asset-based acquisition, all previous project-based acquisitions remain with their corresponding projects as assets registered to the project. Details of each registration are provided on the corresponding Project Detail page.

Once you have completed the configuration indicated earlier in this document, all new asset acquisition requests should be carried out using asset-based acquisition.

Acquire Asset Using Project-Based Acquisition

Project-based acquisition is a means of establishing an "acquisition relationship" between a library project and an asset it uses in its development work. All asset acquisitions take place within the context of a library project, however if project-based acquisition is used, the acquisition relationship is recorded as the acquired asset becoming registered to the project, not to a specific acquiring asset. See Project-based Acquisition for more information.

Prerequisites for Recording a Project-based Acquisition

In order to begin the process of recording an acquisition of a "consumed" asset by a project, there are various settings that must be in place:

- Your library must be configured to allow project-based acquisition or both project-based and asset-based acquisition. See designating asset acquisition mode for more information.
- The user requesting a project-based acquisition must be a participant on the acquiring project.

Acquiring an Asset for a Consuming Project

A typical scenario for using project-based acquisition is for a "development effort" such as the building of an application to be represented as a library project. The participants of this project search the library for existing assets to be used in their current development effort. Any assets found that can be used are requested for acquisition for the project by a project participant.

Each acquisition request may trigger approval requirements related to the use of the asset. The requested asset is "attached" to the project while approvals are pending.

If the acquisition request receives all necessary approvals, its status is updated to "Registered" and the asset is considered registered to the project. At this point, reuse metrics for the project, the consumed asset and the owning group of the consumed asset are incremented.

Example Asset-based Acquisition Scenario

In this example, an application development effort is represented by a library project called "Customer On-line Shopping v2r1." Customer On-line Shopping is an application being developed to provide on-line shopping capabilities to international customers.

1. A user participating in the Customer On-line Shopping project conducts searches for existing assets related to currency conversion. Searches are conducted with the Customer On-line Shopping project as the active project.
2. The user determines that his application development team would like to use a service asset currently existing in the library called "Currency Conversion v2.0." To record this:
   - The user ensures that "Customer On-line Shopping v2r1" is his active project.
   - The user navigates to the Currency Conversion v2.0 asset's information page and clicks on the **[Acquire]** link (located in the Asset Context section) to request acquisition.
3. If there are no approvals required to acquire the asset for the project, the asset is registered to the project immediately.
4. If there are approvals required for use of the asset:
   - an acquisition request is created.
   - optionally, the user may be presented with the Acquisition Request Detail popup where additional information may be solicited.
   - the request to acquire the asset for the project is submitted and users with approval roles are notified of the pending request.

5. If the acquisition request receives all required approvals:
   - the status of the acquisition relationship and the status of the asset attachment to the project become "Registered." This information about the asset's registration to the project is presented on the project detail page and on the asset information page of the acquired asset (in the acquisition status) when the acquiring project is active.
   - application metrics are incremented to recognize the reuse transaction for the asset, the acquiring project and the asset's owning group.
   - any artifacts that were designated as private on the acquired asset become available to all participants of the acquiring project.
6. If the acquisition request is rejected, the asset is detached from the project and the requesting user is notified of this action. Reuse metrics are not incremented and private artifacts of the requested asset remain unavailable to project users.

Acquire Asset Using Asset-Based Acquisition

Asset-based acquisition is a means of establishing an "acquisition relationship" between one asset and another. Even though all asset acquisitions take place within the context of a library project, an asset-based acquisition provides the additional capability of recording the acquisition relationship specific to a particular acquiring asset. See Asset-based Acquisition for more information.

Prerequisites for Performing an Asset-based Acquisition

In order to begin the process of initiating a relationship representing the acquisition of a "consumed" asset by a "consuming" or "acquiring" asset, there are various settings that must be in place:

- Your library must be configured to allow asset-based acquisition or both project-based and asset-based acquisition. See designating asset acquisition mode on the Update Library Configuration page for more information.
- Your library configuration must provide one or more "context enabled" relationships that are available on the capture template of the acquiring asset. See Library Configuration for Asset-based Acquisition for more information.
- The user requesting an asset-based acquisition must have the Asset Capture Engineer role assigned in the owning group hierarchy for the consuming asset.
- The project for which the asset-based acquisition is being requested must be designated as the project "context" for the acquiring asset. See Editing Asset Identifiers for more information.

Acquiring an Asset for a Consuming Asset

A typical scenario for using asset-based acquisition is for a "development effort&" such as the building of an application to be represented as a library project. This project is tasked with creating one or more assets which will eventually represent the final results of the development effort. An Asset Capture Engineer participating in this project will create the asset(s), and ensure that the *project context* for each of these assets is set to the library project.

As development work for the project continues, a next step would be for an Asset Capture Engineer to indicate that new library assets under development in the project will use existing library assets. This is accomplished by requesting an asset-based acquisition for the project (on behalf of an asset owned by the project), and specifying the asset to be used or "consumed."

Once requested, this acquisition may trigger approval requirements related to the use of the asset. However, regardless of pending approvals, a relationship is added to the potential "consuming" asset which represents the acquisition requested.

If the asset-based acquisition request receives all necessary approvals, the acquisition relationship status is updated to "Registered," and metrics for the project, the consumed asset, and the owning group of the consumed asset are incremented.

There are two different methods that can be used to acquire an asset when using asset-based acquisition:

1. Acquire an asset by editing the consuming asset and adding a relationship to the consumed asset
2. Acquire an asset by using the [Acquire] link on the published asset details page for the consumed asset

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Example asset-based acquisition by editing the consuming asset and adding a relationship to the consumed asset

In this example:

- An application development effort is represented by a library project called "*Customer On-line Shopping v2r1*"

- An application asset called "*Customer On-line Shopping*" is being developed to provide on-line shopping capabilities to international customers
- A service asset called "*Currency Conversion v2.0*" already exists in the library

An Asset Capture Engineer (ACE) participating in the "*Customer On-line Shopping v2r1*" project creates an asset representing the Customer On-line Shopping application being developed, and sets the application asset's *project context* to the "*Customer On-line Shopping v2r1*" project. This asset is submitted for publish and is published into the library upon approval.

The Asset Capture Engineer determines that his application development team would like to use a service asset called "*Currency Conversion v2.0*", which already exists in the library. To make this happen, the Asset Capture Engineer would do the following:

- Ensure that the "*Customer On-line Shopping*" application asset is in edit mode (locate the application asset in the library, then Edit the asset).
- On the Edit Asset page, scroll to the Relationships section, and add a new relationship by clicking on the **green +** icon.
- On the Add Relationship dialog, select a relationship type. Since this scenario is trying to acquire a service asset, select a relationship type of *Services Used* and click Next. Note: this relationship type corresponds to one of the context-enabled relationship types that was previously configured in the library under the prerequisites section under Library Configuration for Asset-based Acquisition.
- Search for and select the "*Currency Conversion v2.0*" asset, then click Finish. The Asset Acquisition Details dialog is displayed.
- Fill in any required information for the acquisistion request, and click Submit.

Once the assset acquisition request has been submitted, proceed to the next section, Acquisition Approval.

Example asset-based acquisition using the [Acquire] link on the published asset details page for the consumed asset

In this example:

- An application development effort is represented by a library project called "*Customer On-line Shopping v2r1*"
- An application asset called "*Customer On-line Shopping*" is being developed to provide on-line shopping capabilities to international customers
- A service asset called "*Currency Conversion v2.0*" already exists in the library

An Asset Capture Engineer (ACE) participating in the "*Customer On-line Shopping v2r1*" project creates an asset representing the Customer On-line Shopping application being developed. The "*Customer On-line Shopping*" application asset has its "project context" set to the "*Customer On-line Shopping v2r1*" project. Note that setting the project context step is not necessary if the Active Project is set. The application asset is submitted for publish, and is published into the library upon approval.

The Asset Capture Engineer determines that his application development team would like to use a service asset called "*Currency Conversion v2.0*", which already exists in the library. To make this happen, the Asset Capture Engineer would do the following:

- Ensure that "*Customer On-line Shopping v2r1*" is the active project.
- Optionally, also ensure that the "*Customer On-line Shopping*" application asset is the "active asset".
- View the published asset details page for the "*Currency Conversion v2.0*" service asset, and click on the **[Acquire]** link to request acquisition of the asset.

  Assuming the "*Customer On-line Shopping*" asset is able to be locked, an asset-based acquisition dialog is displayed. If there is not an active asset set, the Asset Capture Engineer is provided with the chance to indicate which asset will be the consuming asset. If there is more than one acquisition relationship type available, the relationship type can also be selected.

Fill in any required information for the acquisistion request, and click Submit.

- If the Customer On-line Shopping asset is not able to be locked, the acquisition process is aborted.

Once the assset acquisition request has been submitted, proceed to the next section, Acquisition Approval.

Acquisition Approval

Once the acquisition request is submitted, any applicable acquisition process configuration governance is performed.

- A relationship is added to the acquiring asset, which represents the requested acquisition. Note that this relationship has an associated Acquisition Status icon corresponding to the request. If the acquisition is pending approval, the status shows as "Pending Approval". If there is no approval required for the acquisition, the status shows as "Registered". The status for the relationship is updated throughout the request approval cycle.
- It is typical for the acquiring asset to be published immediately to include the acquisition relationship in the published asset, as well as the asset in progress. However, this depends on your library configuration.

If the acquisition request receives all the required approvals:

- The acquiring asset shows a *Services Used* relationship for the acquired asset.
- The status of the asset attached to the project becomes "registered."
- The acquired asset shows a *Used By* relationship for the acquiring asset.
- Application metrics are incremented to recognize the reuse transaction for the asset, the acquiring project and the asset's owning group.
- Any artifacts that were designated as private on the acquired asset become available to all participants of the acquiring project.
- A relationship properties icon is displayed.

If the acquisition request is rejected, the status of the acquisition relationship is updated to reflect this. The asset attachment is removed from the project. In this case, metrics are not incremented, and private artifacts of the asset requested for acquisition remain unavailable to project users.

Survey Asset Usage

The approved acquisition of an asset for a project results in the registration of the asset to the project. Registration indicates that a project is reusing an asset. Often, metrics are displayed and reports are created based on the data represented by asset acquisition requests and registrations. In addition, your library may be configured to generate surveys to follow up on each asset registration to a project.

Your application provides a means to generate and record survey information. If your library is configured to include surveys triggered by asset registration, the content of the survey used will be customized to your library's requirements.

Surveys can be used to determine such things as:

- Whether the asset is being reused as planned.
- What was the effort involved in its reuse.
- What is the quality rating for the asset.

Through additional configuration, reports may be customized to reflect survey results. Please see your System Administrator for more information on asset acquisition surveys.

About Asset Acquisition Mode

Asset acquisition may be requested on behalf of a project (project-based acquisition) or on behalf of an asset within the project (asset-based acquisition). Your library configuration supports either project-based acquisition, asset-based acquisition, or both modes of asset acquisition.

Your Library Administrator may configure asset-based acquisition instead of project-based or allow your library to accept both types of asset acquisition. Your library's asset acquisition mode should be chosen based on what is determined to be the best method for your development organization to record the use of existing assets. See "Library Configuration for Asset-based Asset Acquisition" in the Reference section of the web browser application help system for more information.

Project-based Asset Acquisition

With project-based asset acquisition, assets are acquired for a library project, which has been established to serve as context for tracking the asset reuse generated by a specific development effort. When an acquisition is triggered, the project used for its context is the project that is active at the time. In this type of asset acquisition:

- When the project participant clicks **Acquire** for the asset to be consumed, the asset is attached to the project, and the acquisition request is given a status that reflects a pending state (if further approval is required), or a registration of the asset to the project (if no approvals are required). This status is reflected on the asset information page of the asset being acquired and also on the project detail page, attached asset section.
- Depending on the governance in place for the acquisition request, request processing may include such aspects as gathering of information related to the request, post-governance contract creation in Akana's Policy Manager/Service Manager, etc.
- Application Metrics are incremented once the asset becomes registered to the project:
    - Project metrics reflect the reuse of the consumed asset.
    - Asset metrics reflect the project's reuse of the asset.
    - Group metrics of the registered asset's owning group reflect the consuming project's reuse of the owned asset.
- Each asset may be acquired only once for each project.
- The relationship between the consuming project and the acquired asset is the asset registration, represented on the project detail page and on the asset information page of the acquired asset (in the acquisition status) when the acquiring project is active.

Asset-based Asset Acquisition

With asset-based acquisition, not only is an asset acquired for the use of a project, it is also acquired for use by a specific consuming asset. For example, an asset (typically representing code-based development, such as a service asset or an application asset) can acquire an existing asset. Asset-based acquisition provides an additional level of detail for the acquisition by creating a relationship between the acquiring and the acquired asset, in addition to the registration of the acquired asset to the consuming project. As with project-based acquisition, the project used for the context of an asset-based acquisition is the project that is active when the project participant makes the request to acquire an asset. The asset used as context for the asset-based acquisition (in other words, the acquiring asset) by default is the asset that is active when the request is made, although a different asset may be selected from the dialog accompanying asset-based acquisition. With asset-based acquisition:

- The requested asset is attached to the acquiring project and, in addition, a relationship is added to the acquiring asset's metadata representing the acquisition relationship between the acquiring asset and the acquired asset. The relationship created is of a special type called "context-enabled." Your library must have one or more context-enabled relationships defined and used by the acquiring asset's asset capture template in order to support asset-based acquisition. If there is more than one type of context-enabled relationship available to the acquiring asset, the asset acquisition dialog will require the acquiring user to select the one applicable.

- The acquisition relationship is created in the acquiring asset when the acquisition is requested. However, it is associated with an approval status representing the approval status of the acquisition request.
- The relationship added to the acquiring asset is typically configured to by-pass asset submission governance, enabling the acquiring asset to be automatically republished to show the asset acquisition relationship from the time of the initial request.
- As in project-based acquisition, an acquisition request is also created and used to gather request-related information and approval/rejection status when users assigned governance responsibility take action on the request. The current status of the request is displayed on the request detail page and also on the acquiring asset's acquisition relationship in the published asset and the asset in progress.
- If the acquisition request is approved, the asset is registered to the acquiring asset.

* A user requesting asset-based acquisition must have the Asset Capture Engineer role and have the ability to lock the acquiring asset.
* As with project-based acquisition, request processing may include such aspects as gathering of information related to the request, post-governance contract creation in Akana's Policy Manager/Service Manager, etc. based on the governance process in place for asset acquisition.
* Application Metrics are incremented once the asset becomes registered to the acquiring asset:
  - Project metrics reflect the reuse of the consumed asset.
  - Asset metrics reflect the project's reuse of the asset.
  - Group metrics of the registered asset's owning group reflect the consuming project's reuse of the owned asset.
* Each asset may be acquired more than once for each project. In fact, each asset may also be acquired more than once by the same acquiring asset, given the use of different context-enabled relationships.
* The relationship between the consuming project and the acquired asset is the asset registration, represented on the project detail page and on the asset information page of the acquired asset (in the acquisition status) when the acquiring project is active. In addition, the relationship between the acquiring asset and the acquired asset is represented on the published asset's detail page of the acquiring asset and the asset edit page. On both of these pages, there is a link to the relationship context page, which provides context information for the relationship.

Discuss Asset

Your application provides access to a discussion forum for each published asset to facilitate discussions specific to the asset. All users who have visibility to the published asset have access to its discussion forum for viewing and contribution. You can access an asset's discussion forum by clicking on the **Discuss** link or icon when the asset's information is displayed. For information on discussing non-asset-specific topics, use the general discussion forum.

Asset forum topics are often created automatically with the initial publish of the asset, according to the publish template used. Users can also create topics and topic subjects manually within the forum. Example asset forum topics include: Publication Notes, Usage Questions, Feedback, New Requirements, and Frequently Asked Questions (FAQ).

How Discussions are Organized

Discussions are organized in a hierarchical manner by topic. For example there can be numerous topics within your discussion forum. Topics are similar to folders, and serve as a way of organizing discussion. Any user can create a new topic for an asset forum.

Within each topic, there can be many threads. Each thread consists of:

- the original post (called a subject) which begins the thread
- all direct replies to the original post
- all replies to any direct replies
- all replies to any reply

Notifications of Thread Activity

There are two ways you can choose to receive notifications related to asset discussion forum activity:

- Set your user account preferences to indicate the election to receive notifications when replies are made to your forum posts. As a result you will receive an email when someone replies to a subject you create for an asset discussion forum topic. In addition, you will also receive an email notifying you when another user replies to a reply you posted within a discussion thread. Note: you will not receive notification for replies made to posts originated by another user. See the *Manage My Account* section of your web browser application help system for more information on user preferences.
- Subscribe to an asset to receive email notification each time a new discussion thread is initiated by the creation of a subject for a topic and also when a post is made to any part of an existing discussion thread within an asset topic. See asset subscription for information about additional notifications generated by asset activity.
  - Asset subscription notifications are generated regardless of your account setting for forum notification preferences.
  - Asset subscription notifications are generated for all thread activity, regardless of which user originated the thread or replied to a post.

Note: you will not receive notification when you post something to a forum.

Forum Maintenance

Forum topics, threads and/or replies can be deleted from an asset discussion forum by a Library Administrator or by an Asset Owner or Publisher responsible for the asset. If you hold one of these roles for the asset, you will see a **[Delete]** link to the right of each forum topic, thread and reply message. If you click delete for a reply, the reply is removed from the forum topic. If you click delete for a thread, the thread and all of its messages are removed from the associated topic. If you click delete for a topic, the topic is removed along with all of its related threads and messages.

Forum Actions:

Forum pages provide access to the following actions.

- Create New Topic - create a new topic in the asset forum.
- Search This Forum - search topics, threads, and replies in the asset forum.
- Create New Thread - create a new discussion thread within a topic of the asset forum.
- Search This Topic - search all threads and messages in a topic.
- Reply - reply to a post.

Asset Relationship Tree

This popup window shows a hierarchical listing of relationships for the asset you are viewing. Each relationship name expands to provide a listing of assets targeted by each relationship. Expanding the section provided for a target asset results in a display of relationships owned by the target asset and so on.

You can display an asset relationship tree by clicking on the **[Show Relationship Tree]** link provided on an Asset Information page.

This window contains the following information, icons, and links:

Title Bar

The Title Bar of the Asset Relationship Tree popup window includes the following:

Collapse or Expand Icon

This up or down arrow icon will collapse or expand the popup window of the asset. Click the up arrow to collapse the popup window.

? (Help) Icon

This icon displays this help page.

X (Close) Icon

The X icon will close the Asset Popup window.

Asset Relationship Tree

- **Asset Name (Version)** - The name and version of the asset you are focusing on is provided as the top-level item in your relationship Tree. Hover over this information to display the type of this asset.
    - **Relationship Name** - A list of asset relationships is provided for this asset by relationship name. Hover over the relationship name to display a description of the relationship. You can display or remove this list of relationships using the + or - icon provided on the Asset Name.
        - **Asset Name (Version)** - A list of one or more related assets (target assets) is provided. Hover over the target asset name to see the asset type and a summary of its classifier information. You can display information about this asset using its right-click context menu. You can display or remove this list of assets for each type of relationship using the + or - icon provided on the Relationship Name.
            - **Relationship Name** - A list of asset relationships is provided for each "targeted asset" by relationship name. Hover over the relationship name to display a description of the relationship. You can display or remove this list of relationships using the + or - icon provided on the target Asset Name.
                - **Asset Name (Version)**

                  and so on.. (the display will continue in a nested fashion to provide targeted assets and their included relationships)

Asset Relationship Tree Example

A relationship tree display for an Application asset related to one Service asset would look something like this:

- |asset type icon| OrderProcessApplication (5.0)

    - |folder icon| Related Service

- |asset type icon| PriceQuoteService(2.0)

  - |folder icon| Related Application - Note: Related Application is the reverse relationship name for Related Service listed above.

    + |asset type icon| OrderProcessApplication (5.0)

Visualize Asset Relationships

Asset Relationship Visualization provides a graphical display of assets in your library, showing your primary asset (the one from which you launched the visualization) and its related assets. The view allows you to alter the display itself and also to designate which assets and relationships are included. Within the asset visualization, the *focused* or active asset is highlighted, and shown near the center of the window.

Starting the Asset Relationship Visualization View

- From the web browser application:

  Click the **[Visualize]** link at the top of an asset information page. This action results in a new browser window.

- From a rich client application:

  Right-click the asset name, and select the **Visualize** option. The Asset Relationship Visualization view is shown in a tab.

Note: the **Visualize** option is only available for published assets which have at least one relationship to another asset. You can close the view by closing its tabbed window.

The Asset Relationship Visualization view contains two panes: the Control Panel on the left and the Asset Relationship Visualization main content which is presented in primary view. The Asset Relationship Visualization view includes the following options, links and information for each of the two panes:

Control Panel

On the left side of the Asset Relationship Visualization is a control panel that allows you to perform the following actions:

<< Icon

The contraction/expansion icon is used to collapse an open control panel or expand the control panel again when it has been collapsed. It toggles between **<<** and **<<**. Click the **<< icon** to collapse the control panel to the left. When the control panel is collapsed, you can click the >> **icon** to open the hidden control panel.

Spread

Use the up or down arrows to increase or decrease the distance between the assets represented in the main relationship content window. You can also use your mouse scroll wheel on the relationship graphic content to alter the spread used.

Zoom

Use the up or down arrows to increase or decrease the size of items represented in the main relationship content window. Each click changes the display size by ten percent. You can hold down your mouse button to repeatedly change the zoom setting by ten percent increments. The minimum display zoom is ten percent and the maximum zoom is five hundred percent. You can also use your mouse scroll wheel or the + or - keys on your keyboard when the Zoom level is in focus.

Visible Levels

Specify a depth value by selecting the number of **Visible Levels** using the up or down arrows.The number of Visible Levels you designate specifies how deep the asset relationship display extends in your display. For example, a depth of 1 level will show only the immediate relationships of the primary asset. A depth of 2 will show the immediate relationships of the primary asset plus the relationships of each of the depth 1-related assets. A depth of 3 will include yet another set of relationships for the level 2 assets, and so on.

Max Levels

When your assets have a deep hierarchy of relationships, loading the visualization graph can be a very time-consuming operation. The Max Levels setting can help speed up the initial time taken to load the graph. Using a smaller number means fewer relationship levels will be initially loaded, thus causing a faster load time. If Visible Levels is increased above Max Levels, a new level of relationships is loaded (if data exists), and Max Levels is increased accordingly.

Show Labels

- Click the check box for **Edge** Labels to include or remove relationship names on the connection line between two related assets.
- Click the check box for **Node** Labels to include or remove the asset name next to each asset type icon.

Layout

Select the layout you want to use when visualizing your assets. To save your selected layout option as the default, click the **Save** button.

- **Layers** - choose the Layers layout to display your related assets in a layered fashion, where each layer represents assets that are grouped together based on a library-specific classifier. Using a layered layout can make it easier to visualize how assets fit into various architectural layers or categories. The classifier used for layering can be selected using the *Layer* option. The default layering classifier, and the full list of available layering classifiers are configured in your library's Global Definition Template (GDT) by your Library Administrator.

  The layers on your display are shown in the order in which the layering classifier's values are enumerated in your library's configuration. Only layers that contain at least one asset are shown. Classifiers that do not contain a value for the library-specific layering classifier are shown in a section entitled "Unclassified." When using Layers layout mode, double-click navigation to change the focused asset is not supported.

- **Radial** - choose the Radial layout to display your related assets in a radial fashion, where the focused asset is shown near the center of the window and related assets are shown as spokes radiating outward.

Layer

The Layer option is used when you are visualizing assets using the *Layers* layout. It allows you to select the classifier used to organize your assets into layers. The classifiers available for selection here are configured in your library's Global Definition Template (GDT) by your Library Administrator. To persist your selected Layer classifier as the default, click the **Save** button.

Filter

Click the **Filter** button to select which relationships and which asset types will be shown in your view. This action displays a dialog where you can select the conditions of your filter. Once you have selected your filter options, click the **Apply** button to refresh the view with the new filter settings. If you want to save your filter options, type the name of your filter and click **Save**. Click the **Close** button to close the Filter dialog.

There are two categories of filter settings in the Filter dialog: Relationship Filters and Asset Filters.

Relationship Filters

Click Up arrow to contract or Down arrow to expand this section.

- **Direction**:
  - **Incoming** - select this radio button to include only those relationships included in other assets that target your focused asset.
  - **Outgoing** - select this radio button to include only those relationships included in your focused asset which target other assets.
  - **Both** - select this radio button to include both incoming and outgoing relationships of your

focused asset.

- **Relationship Type:**
    - A list is presented showing all relationship types configured for your library. Each type has a corresponding checkbox which you can select or de-select individually in order to designate which relationship types should be included in your visualization.
- **Project Name:**
    - A list is presented showing all the projects in your library. Each project has a corresponding checkbox which you can select or de-select individually in order to designate which projects should be included in your visualization.
- **[Property]:**
    - If your library has properties which are configured with "Allow filtering by Asset Relationship Visualization" checked on, these properties will appear as a Relationship Filter. A list is presented which includes all of the property values for that property. Each property value has a corresponding checkbox which you can select or de-select individually in order to designate which property values must also be set for the relationships included in your visualization.

Asset Filters

Click Up arrow to contract or Down arrow to expand this section.

- **Asset Type:**
    - A list is presented of all the asset types configured for your library. Each type has a corresponding checkbox which you can select or de-select individually to designate which asset types to include in or remove from your visualization.
- **[Classifier]:**
    - If your library has classifiers whose behavior specifies the classifier should be included in Asset Relationship Visualization filters, these classifiers will appear as an Asset Filter. A list is presented which includes all of the classifier's values. Each classifier value has a corresponding checkbox which you can select or de-select individually to designate which classifier values must also be set for the assets included in your visualization. An asset will only be visible if it has a classifier value matching at least one selected filter value for every classifier filter that is enabled.

Hover Fields

Click the **Hover Fields** button to select what type of data is shown in the tool tip when you hover over an asset.

Hide Nodes

Click the **Hide Nodes** button if you want to hide one or more assets from your visualization view. You can view hidden assets again later by selecting **Hide Nodes** again, and un-checking the hidden assets.

Print

Click the **Print** button to print what is displayed in your Asset Relationship Visualization view.

Home

The Home button will revert the Asset Relationship Visualization back to the original focused asset.

Asset Relationship Visualization - primary view

Navigation and Display Modification

The currently-focused asset is displayed with red text and highlights. Related assets are shown in blue text. Depending on your control panel settings, you may have multiple levels of recursion (relationship depth) represented in your display. The following controls are available:

Double Click

When viewing assets using **Radial** layout mode, double-clicking an asset will move this new asset into primary focus and change the relationships and related assets displayed to be those of the newly-chosen asset. Double-click has no effect on asset focus when viewing assets using **Layers** layout mode.

Asset Tool Tip

Hover over a related asset to display a tool tip with an asset name link, asset description, asset type, status, and other information based on your library configuration. Click on the asset name link to open the asset information in a new view.

Relationship Tool Tip

Hover over the Relationship line connecting two assets to show information about the relationship in a tool tip. The tool tip provides the names of the From (source) and To (target) assets as well as the relationship name and description.

Click and Drag

- Click on any asset included in the display and drag it to a different location within the Asset Relationship Visualization view. Moving Assets will allow you to organize the asset layout as desired.
- Move your entire display around the screen by clicking and dragging anywhere on the white space within the view window.

Print the Asset Relationship Visualization

You can print what is displayed in your Asset Relationship Visualization view by pressing Ctrl-p.
Note: if you press Ctrl+p while your mouse is hovering over an asset, your print will include the related asset's type and relationship information.

Subscribe to an Asset

Subscription to an asset is an election you can designate for an asset if you wish to be kept informed of activity related to the asset.

Subscribing to an asset means you will receive email notification each time:

- the asset is republished to your library. In this case, the notification includes information about what was updated in the asset.
- a new version of the asset is published.
- a new thread or reply is posted to the asset's discussion forum.

Subscription Features

- You can subscribe or unsubscribe to any asset at any time. A list of assets to which you are currently subscribed is available by clicking **View All** in the *Subscribed Assets* section of your web browser application home page or by opening the **Subscribed Assets** folder of your rich client application.
- You can subscribe or unsubscribe to an individual asset from its information pages (or rich client **Information** view) by clicking on the appropriate item. You can remove subscription to multiple assets from the web browser application's User Subscribed Assets page. This page is displayed by clicking on **View All** in the *Subscribed Assets* section of your web browser application home page. Using a rich client application, you can remove all asset subscriptions by selecting **Unsubscribe All** from the right click menu of the **Subscribed Assets** folder.
- You are automatically subscribed to any asset that you request to acquire for your project.

About Asset Registration Revocation

When a Project Manager or other project participant determines that the registration of an asset to the project should be removed, he or she will click on the **Revoke** link/icon. The action to request the revocation of the asset registration creates an "asset revocation request." An asset revocation request may trigger pre-governance, governance and/or post-governance processing depending on your library's asset revocation process configuration.

- Asset registration revocation is only available for assets that have reached full approval for asset acquisition by a project and potentially an acquiring asset.
- Assets that are registered to a project are included in application metrics for the project, the asset and the asset's owning group. By removing an inappropriate asset registration, these metrics are corrected and the project will no longer show an attachment to the asset.
- Revoking the registration of an asset registered to an acquiring asset changes the status of the acquisition relationship in the acquiring asset to "revoked." The relationship itself remains in place until removed by an Asset Capture Engineer.
- Once an asset registration is revoked, private artifacts of the asset will no longer be visible and available to project participants.
- Some assets may not provide an **Revoke** link or icon when they are registered to a project, based on your library's revocation activity configuration. See your Library Administrator for more information about the revocation configuration of your library.

Asset Revocation Process Governance

Your library process configuration may have established a governance process for the revocation of asset registrations. This process may vary by asset type or other asset classifications. If asset revocation process governance is in place for an asset, a revocation request will be created and pending request notification will be sent to users with the appropriate approval roles when revocation is requested.

Asset Revocation Approval Status

The status of the revocation request is displayed on the asset detail page of the registered asset (when the registered project is your active project) and on the registered project's detail page in the attachment section.

If the asset is registered to an acquiring asset (see Acquisition Mode), the status is also included with the relationship added to the acquiring asset. This acquisition relationship and its status can be viewed on the acquiring asset's asset edit page and on its published detail page.

In addition, if you are the user requesting revocation of an asset registration, you have access to the revocation request and its updated information from your **My Requests** list accessible from the left navigation bar or My Requests view.

Once all necessary approvals are received, the asset registration revocation results in the removal of the asset attachment to the project. If the asset is registered to an acquiring asset, the acquisition relationship remains in the acquiring asset; however its status set to "revoked." An Asset Capture Engineer can remove the relationship as desired.

Revoke Asset Registration

The use of a library asset is recorded by the registration of the asset to a project. If asset-based acquisition is used, the asset may also be registered to its acquiring asset. Asset metrics and asset acquisition relationships display information about asset registration.

In some cases, it is necessary to remove the registration of the asset from a project. For example, an asset may have been planned for reuse with a project and thus registered to it. If subsequently it is discovered that the asset will not be used for the project, it is important to remove the asset's registration to the project by revocation to correct related metrics and asset relationships.

Revocation of an asset registration may be initiated by clicking on the **Revoke** button on the asset acquisition context page.

Asset Revocation Request Page

The results of clicking **Revoke** on the asset acquisition context details page is determined by the asset revocation governance process in place for the registered asset. In some cases the Asset Revocation Request detail page is displayed. In other cases, the asset registration is revoked immediately, without the creation of a request for approval. For example:

- If your library has an established asset revocation governance process that applies to this asset registration:
  - the asset revocation request page may be displayed providing you (as revocation requester) with the opportunity or requirement to add comments and/or additional information to your request. See Asset Revocation Request detail page for more information.
  - the asset revocation request page may be suppressed for the revocation requester if there is no further information expected to be gathered from you for the request.
  - the asset revocation request page is available to all users who are potentially involved in submitting, reviewing and approving or rejecting the revocation request. These users will receive an email notice and a pending request with links to the request detail page.
- If your library configuration does not include an asset revocation governance process for the registered asset, the asset registration may be removed from the project and acquiring asset (when applicable) immediately. In this case, the asset revocation request page is not created.

Asset Revocation Request

When your library is configured to require approval prior to the revocation of an asset registration, an asset revocation request is created when a user selects **Revoke** from the asset's acquisition relationship context page. See asset acquisition relationship context page for more information.

Regardless of whether the revocation request is presented to the asset revocation requester (as described in the previous section), the request is routed to the users who hold the approval roles specified in the library's asset revocation process configuration. These users receive both email notification and a pending request at appropriate times in the approval and review cycle established for this asset submission.

The original revocation requester is informed by email of the actions taken and can also view the revocation request detail page by selecting the request from their My Requests list.

Depending on the specific configuration of your library's asset revocation governance process:

- There may be multiple steps included for the approval process.
- Multiple approval roles may be involved and the approvals may be required to take place in sequential order or in parallel.
- Each approver will receive notification and access to the request detail page at appropriate times of the approval cycle.

- In cases where multiple users share responsibility for approving a step in the process, only one individual needs to take action.

Each user taking action on a request will have the opportunity, and in some cases the obligation, to add information to the request in the form of property information.

If and when the request becomes fully approved, the asset registration is removed from the project and from the acquiring asset (when applicable). If the request is rejected by any of the approvers, the asset revocation fails and the asset remains registered to the project and to the acquiring asset (when applicable). The asset revocation requester is informed of either outcome.

See Asset Revocation Request detail page for more information on the request triggered by the submission of an asset for publish. Please see your Library Administrator for more information about your library's asset registration revocation process configuration.

Requesting the Acquisition of an Asset

Your library may be configured to offer you the ability to acquire the use of an asset for your project or to acquire its use for an asset produced by your project.

As a library user, you can click on the **[Acquire]** link provided on the asset information page or by adding a consumption-type relationship on the published asset. The results of taking this action are determined by your library's asset acquisition governance configuration.

See About Asset Acquisition for more information.

Acquire Link Availability

A published asset may or may not include an **[Acquire]** link on its asset information page. Your library configuration can limit the availability of the Acquire link by establishing a filter associated with the asset acquisition activity. See your Library Administrator for more information on the Acquisition Activity configuration of your library.

Asset Acquisition Request popup

The results of clicking **[Acquire]** on an asset information page is determined by the asset acquisition governance in place for the asset requested. For example, in some cases, the Asset Acquisition Request Detail popup is displayed. In other cases, the asset is immediately registered to your project without the creation of a request for approval. For example:

- If your library has established an asset acquisition governance process that applies to this asset:
  - the asset acquisition request popup may be displayed providing you (as requester) with the opportunity or requirement to add comments and/or additional information to your request. See Asset Acquisition Request detail popup for more information.
  - the asset acquisition request popup may be suppressed for the requester of the asset acquisition if there is no further information expected to be gathered from you for the request.
  - the asset acquisition request popup is available to all users who are potentially involved in reviewing and approving or rejecting the acquisition request. These users will receive an email notice and a pending request with links to the request detail popup.
- If your library configuration does not include an asset acquisition governance process for the asset requested, your asset may be automatically registered to your project and an acquisition relationship recorded for the acquiring asset if applicable. In this case, the Asset Acquisition Request popup is not created.

Asset Acquisition Request

When your library is configured to require approval for the acquisition of an asset, an asset acquisition request is created when a user (project participant) clicks on the **[Acquire]** link of a published asset. See Asset Acquisition Request detail popup for more information.

Regardless of whether the acquisition request popup is presented to the requester (as described in the previous section), the request is routed to the users who hold the approval roles specified in the library's asset acquisition process configuration. These users receive both email notification and a pending request at appropriate times in the approval and review cycle established for this asset submission.

The original submitter of the request (the user who clicked **[Acquire]** for the requested asset) is informed by email of the actions taken and can also view the acquisition request detail popup by selecting the request from their My Requests list.

Depending on the specific configuration of your library's asset acquisition governance process:

- There may be multiple steps included for the approval process.
- Multiple approval roles may be involved and the approvals may be required to take place in

sequential order or in parallel.

- Each approver will receive notification and access to the request detail popup at appropriate times of the approval cycle.
- In cases where multiple users share responsibility for approving a step in the process, only one individual needs to take action.

Each user taking action on a request will have the opportunity, and in some cases the obligation, to add information to the request in the form of property information.

If and when the request becomes fully approved, the asset is registered to the requester's active project. If the asset is acquired by an asset, an acquisition relationship is included in the acquiring asset and the status of this relationship becomes "registered."

If the request is rejected by any of the approvers, the asset is no longer associated with the requester's active project. If the asset was requested for a project asset, the acquisition relationship that was added to the acquiring asset when the acquisition request was made remains as an asset relationship. However, the status of this relationship becomes "rejected."

The requester of the asset acquisition is informed of either outcome. See Asset Acquisition Request detail popup for more information on the request triggered by a user clicking an asset's **Acquire** link. Please see your Library Administrator for more information about your library's asset acquisition process configuration.

Relationship Context

Asset acquisition request information is not only made available to the acquisition requester and users who participate in the acquisition request governance cycle. This information is also populated into what is called the "context" of the acquisition. Acquisition context provides the means to persist information that is created with and added to the acquisition request as it evolves through the request process.

Acquisition context information can be displayed from the **Relationship Context icon** on the asset information page of the acquired asset. In addition, if the acquisition is asset-based you can also display the context from the acquisition **Relationship Context icon** for the acquisition relationship in the metadata of the acquiring asset or its edit page.

See Acquisition Context popup for more information.

Searching for Assets

There are four primary ways to find library assets that have been published: Asset Tree, Search Box Search, Asset Query, Model Based Search. Each of these search methods are distinguished by the type of search conducted and the type of search criteria that can be used.

Search Types

The following search types are provided for your library:

Asset (open context)

An asset search will return a list of assets available to your active project which include the given text string in any of the following asset elements:

- Searchable asset elements include:
    - Asset Name(or alias)
    - Asset Description
    - Asset Overview
    - Any classifier value
    - Any searchable artifact (Applies only to artifacts defined as "searchable" in your library's Global Definition Template)

For example, the resulting Search Results page for an open context search will display a list of the assets (including their names, versions, and descriptions) that meet your criteria. If you do not include a text string in your search, all assets that are available to your project are included in this list. In addition, the result list gives you the option of creating an asset query specification (AQS) and selecting assets to attach to that AQS.

Asset by Name

An Asset by Name search will return a list of assets available to your project whose name (or alias) includes the text string given (if any). The resulting asset Search Results page will display the name, version, and description of all the assets that meet this condition. If you do not include a text string in your search, all assets that are available to your project are included in this list. In addition, the result list gives you the option of creating an asset query specification (AQS) and selecting assets to attach to that AQS.

Asset by Keyword

An Asset by Keyword search will return a list of assets available to your project which have a keyword that exactly matches the text string given. The resulting asset Search Results page for a search by keyword will display the name, version, and description of all the assets that have keywords equal to the text string you have entered. Keyword searches differ from other asset searches in that search strings that give only a portion of an asset's key word will not return a match. In addition, the inclusion of more than one keyword in the search string will not return a match even if the asset includes more than one keyword, each of which are included in the search string.

For example, if your library has an asset named *EuroDisplay Commerce Server 2000* which has three key words in its metadata: *convert, money, commerce server.*

- If you enter *convert money* as a search string for a search box search with the context set to Keyword, the asset will not be returned as a result asset.
- If you enter *commerce* as a search string for a search box search with the context set to Keyword, the asset will not be returned as a result asset.
- If you enter *convert* as a search string for a search box search with the context set to Keyword, the asset will be returned as a result asset.

- If you enter *"commerce server"* as a search string for a search box search with the context set to Keyword, the asset will be returned as a result asset.

Note: If you do not include a text string in your keyword search, no assets will be included in the result list. The result list page gives you the option of creating an Asset Query Specification (AQS) and selecting assets to attach to that AQS.

Help Entering Search Terms

Search Criteria

Depending on your search method, search criteria may consist of classification criteria, search string criteria or both classification and search string criteria. When both type of criteria are included for a search, assets must meet the conditions of both to be included in the search result.

- Asset Tree - Classifier values only
- Search Box/Ad hoc Search - Search String only
- Asset Query - Classifier values and Search String (either or both)
- Model Based Search - Classifier Values designated by reference model navigation

Search String Criteria

To include a search string in an Asset Query Specification, enter one or more character strings or a few descriptive words into the search text field and click on the **Run** button to list your results. Below are some helpful tips for creating a search string that will generate the desired results:

- Each set of characters, which is called a search term, used in your search field assumes a leading and trailing wild card character *.
- You can use wild card characters in your search string.
    - * represents a search for any value, consisting of one or more characters
    - ? represents a single character
    - An example search string that would find all non-null values: ?
- If you want to include multiple terms in your search string, you can separate each term with a space. Multiple search strings separated by a space are treated as an "or" condition, which results in assets being found if they include any of the strings designated.
- You can search for a complete phrase by enclosing it in quotation marks. Words enclosed in double quotes ("like this") will appear together in all result assets exactly as you have entered them. You may mix quoted terms with non-quoted search terms as needed.
    - Note: because the double quote is used as a delimiter for search strings, you cannot use a double quote as a character to be found in assets or other items.
- If you are using more than one search term, you can designate whether the search results should contain Any or All of the search terms by clicking on the corresponding radio button above the search string field in the Search Properties page. Here are some examples to help clarify which operator is the best to use for your particular search:
    - **All -** the All operator narrows a search requiring that all search terms be matched in an asset in order for the asset to included in the search result. A search using the all operator retrieves every asset that contains a match to all of the terms specified in your search string. For example, to locate assets containing both *asset* and *presentation* in their metadata, you would enter *asset presentation* in the search text field and use the All operator.
    - **Any -** the Any operator broadens or widens a search to include documents containing any of the words or character strings entered. The Any search is particularly useful when there are several common synonyms for a concept or variant spellings of a word. To find assets related to quality assurance, enter the terms *quality assurance*, then use the any operator. The search result will return all assets that contain the string *quality*, or the string

assurance or both strings in the metadata defined by your search specification.

Classification Criteria

Classification Criteria consists of values for one or more of the classifiers available in your library assets.

1. Entering a full or partial character string for a classifier search criteria will designate that library assets that include this string in their corresponding classifier value will be considered a match. In other words, each classification criteria you enter for a string-type classifier is considered to have a leading and trailing wild card. (Note: numeric, Boolean and date classifier types require values that are an exact match.)

2. If more than one asset classifier value is included for your query, all classifier values must be matched in order for an asset to be found by the search. In other words, when you specify multiple values for multiple classifiers, these criteria are considered in an "AND" type of relationship to each other. Conversely, if you enter more than one classifier value for the same classifier, these values are considered to be in an "or" condition. For example, any asset that matches either of two values given as criteria for a classifier will be included in the result set of the search.

3. You may establish classification criteria using classifiers defined as compound. A compound classifier is one that is comprised of two or more fields of information related in a designated order.

   For example, a compound classifier named "financial-software" may be comprised of the following fields: fs-vendor, fs-package, and fs-version. To establish query criteria using this example classifier, you could:

   - Designate a value for all three fields. This means assets resulting from the search must contain these three specific values for each of the corresponding fields in their financial-software classifier metadata.

   - Designate a value for fs-vendor only. This means assets resulting from the search must contain the fs-vendor value plus any values for fs-package and fs-version. In other words, a wild card is assumed for any trailing fields for which you do not designate a specific value.

   Note**:** Assets which have only partial values in a compound classifier (that is, one or more of the trailing fields have been left blank) will only match classification criteria that have wildcards for those values. They will not match assets whose field values for the classifier have been specifically designated.

Asset Contacts page

The Asset Contacts page displays the contacts that are associated with an asset. You can display this page by clicking on the **[Show Contacts]** link of an asset display page.

Adding contacts on an asset can make it easier for an asset user to find out more information about usage and support of the asset.

Asset Contacts page content

This page contains the following links and asset information and selections.

Home

Click on this bread crumb link to display your home page.

Asset

Click on this bread crumb link to display the Asset page for the asset whose contacts you are displaying.

Email links

Each contact is shown with an Email link. Click on the link to send an email to the specified contact.

Asset in Progress Popup

This page provides a snapshot view of the primary asset metadata and other information about the asset. The read-only asset in progress popup window also provides a number of links enabling you to perform various actions, including comparing the asset to another and creating a relationship to the asset in progress in the main content window. A more complete set of asset information is provided in the Asset in Progress page.

You can display an asset in progress popup window by clicking on an asset link in the related assets section of an asset information page or by using the right-click menu provided for each related asset. Alternatively, you can perform a quick search (from the mechanism offered in the upper right side of an asset information display) and click on an asset link provided in the search result to open a corresponding popup window. To edit the read-only asset in progress popup, click the **Load Current Asset into Main Content Window** icon and then click the **[Edit]** link.

This window contains the following information, icons, and links:

Title Bar

The Title Bar of the Asset Details popup window includes the following:

Asset Name (Version)

The name of the asset displayed and its corresponding version.

Collapse or Expand Icon

This icon displays as either an up or down arrow depending on the window's current condition. Clicking on the icon as an up arrow will collapse a popup that is currently expanded. Clicking on the icon as a down arrow will expand a collapsed popup window.

Compare Icon

Use this icon to open a page showing the differences between the asset in your popup window and the asset in the primary display. The comparison is provided in a new popup window and includes the differences between the assets' Identifiers, Artifacts, Relationships and Classifiers.

Green + Relationship Icon

The **green + relationship** icon allows you to add a relationship from the asset in the snapshot to the asset in the main content window. Click the **green + relationship** icon, the Add Relationships popup will be displayed, select the type of relationship from the dropdown list and click the **Finish** button. A relationship is created between the asset snapshot and the asset in the main content window.

Load Current Asset into Main Content Window Icon

This icon loads the asset from the popup window into the primary asset information display. The popup window is closed as a result.

X (Close) Icon

The X icon will close the Asset Popup window.

Asset Popup Header

These items are displayed for the asset in the header section of this page:

- Asset Type - the value of the asset type classifier
- Description - a brief description of the asset

Asset Context

Click the up or down arrow icon to expand or collapse this section.

See Asset Context for more information.

Classifiers

Click the up or down arrow icon to expand or collapse this section.

See Asset Classifiers for more information.

Artifacts

Click the up or down arrow icon to expand or collapse this section.

See Asset Artifacts for more information.

Relationships

Click the up or down arrow icon to expand or collapse this section.

See Asset Relationships for more information.

Asset Working Set

The Asset Working Set dialog allows you to perform actions against a group of published assets. The actions you can perform are the same ones available to you on the Search Results page, but using a working set gives you the ability to group together assets from a potentially more diverse set of assets than those returned from a single search. You can add assets to the working set from a variety of places, including:

- the Search Results page
- the Asset Information page
- the Asset Information snapshot window
- the right-click context menu of an asset in the Asset Tree
- the right-click context menu of a published asset in the Quick Search list

After you have completed grouping assets into your asset working set, click on the **Asset Working Set** link in your application's left navigation bar to bring up this dialog.

Title Bar

The Title Bar of the Asset Working Set dialog includes the following:

Collapse or Expand Icon

This icon displays as either an up or down arrow depending on the window's current condition. Clicking on the icon as an up arrow will collapse a dialog that is currently expanded. Clicking on the icon as a down arrow will expand a collapsed dialog window.

? (Help) Icon

This icon displays this help page.

X (Close) Icon

The X icon will close the Asset Working Set dialog.

Asset List

The assets in your working set are shown in a list. The list includes the following information for each asset:

- A selection box, which indicates whether the asset will be included in the upcoming action. By default, all assets in your working set are selected, but you can tailor the list by deselecting the assets you want to exclude.
- Asset name and version.
- Asset type.
- Lifecycle status of the asset.

Each asset name in the list is also linked to provide easy access to opening the asset's information in an Asset Popup window. You can also right-click on an asset to perform additional operations, including:

- Show in Main Window - display the asset information for the selected asset in the current browser window.
- Show in New Browser Tab/Window - display the asset information for the selected asset in a new browser tab or window. Your browser settings determine whether a new tab or a new browser window is opened.

- Show in Snapshot Window - display the asset information for the selected asset in a new asset snapshot (popup window).

Remove

Click on this button to remove only the selected assets from your working set.

Remove All

Click on this button to remove all of the assets from your working set, whether or not their selection box is checked on.

Action Name or Process Assets

Depending on the number of actions your Library Administrator has configured for your library, you may see one of these buttons. If only one action is available, the button is labeled with the name of the action, and clicking the button invokes the action. If multiple actions are configured, the button is labeled *Process Assets,* and clicking the button invokes a dialog showing a list of the actions you can select from. A common action you might see here is the Delimited File Exporter, which allows asset information to be exported into a format compatible for later use with the Delimited File Importer. For more information about available actions, see your Library Administrator or the Library Configuration Guide.

Select items from the list to perform an action for the selected assets. Once you have selected the action to perform, you may be prompted to enter parameter information. Enter the requested information, and click **Process** to complete processing.

Change Active Asset

When your library is configured to use asset-based acquisition, and you have the Asset Capture Engineer (ACE) role, you can set the active asset by clicking on the **Active Asset [Change]** link in the Consumption section of your left navigation bar. A list of assets available for consumption are displayed.

Change Active Asset dialog contents

This dialog contains the following selections and information:

Filter by name

If you are assigned to work with a large number of assets, you can make it easier to find the one you want to work with by typing in part of the name and clicking on the **Apply Filter** button. The list of assets is refreshed to reflect only those whose name contains your filter.

Asset List

The assets to which you have access are listed, optionally filtered by name. Information shown for each asset includes the Name and Version, Description, and an indication about whether the asset is currently available for edit. Your current selection is shown by default.

Updating your asset selection

To select a different active asset, select the radio button next to the asset you wish to use.

Save

Click on this button to set the active asset to the asset you selected.

Cancel

Click on the **Cancel** button to exit the dialog without changing the active asset.

Change Active Production Group

Once you have created your first asset, the name of your current active production group is listed in the Production section of the left navigation bar. You can change the active group by clicking on the **[Change]** link next to the group name, which displays this dialog.

The active production group setting is used to provide a default owning group for new assets you create. You have the option to override this default when creating or editing an asset. If you do, the new group you choose will be used to set a new active group. See Create an Asset or Editing Asset Context for more information.

Change Active Production Group dialog contents

This dialog contains the following selections and information:

Filter by name

If you are assigned to work with a large number of groups, you can make it easier to find the one you want to work with by typing in part of the name and clicking on the **Apply Filter** button. The list of groups is refreshed to reflect only those whose name contains your filter.

Group List

The groups for which you have access are listed, optionally filtered by name. Information shown for each group includes the Name and Description. The current active administration group is selected by default.

Updating your group selection

To select a different active production group, select the radio button next to the group you wish to use.

Save

Click on this button to set the active production group to the group you selected.

Cancel

Click on this button to cancel out of the group selection dialog without changing the active group.

Change Active Project

If you are assigned to multiple projects, the Change Active Project dialog enables you to select which project you wish to use as your current active project. You can also select a default project, which will become the active project the next time you log in to the library. For more information about projects, see About Projects.

From this dialog you can:

- Change the active project for your current session.
- Change the default project, which will become the active project the next time you log in to your library.
- Filter the groups shown in the list.

Change Active Project dialog contents

This dialog contains the following selections and information:

Filter by name

If you are assigned to work with a large number of projects, you can make it easier to find the one you want to work with by typing in part of the name and clicking on the **Apply Filter** button. The list of projects is refreshed to reflect only those whose name contains your filter.

Project List

The projects to which you are assigned are listed, optionally filtered by name. Information shown for each project includes the Name and Description. Your current selections are shown by default.

Updating your project selections

To select a different active project for your current session, select the radio button next to the project you wish to use.

To select a different default project, select the radio button next to the project you wish to make the default.

Note you can select an active project which is different from your default project. If you wish to change both your current active project and your default project to be the same, you must choose both of them on the Change Active Project dialog.

Save

Click on this button to save your project selections.

Cancel

Click on this button to discard your changed project selections, and return your selections to their previous values.

Discuss General Topics

Your application provides access to a forum which facilitates discussions on non-asset-specific topics. All users, regardless of the application they use to interact with the library or their library role assignments, have access to the general discussion forum. You can access the general discussion forum with your web browser application by clicking on the **Discussion** link available on your top navigation bar. When you are using a rich client application, you can access this forum from the right click menu when your mouse is on a library connection in your Library Explorer view. As its name implies, this "general" forum is for topics of any nature that do not apply to a specific asset. For information on discussing a specific asset, use the asset specific discussion forum.

How Discussions are Organized

Discussions are organized in a hierarchical manner by topic. For example there can be numerous topics within your discussion forum. Topics are similar to folders, and serve as a way of organizing discussion. Any user can create a new topic for an asset forum.

Within each topic, there can be many threads. Each thread consists of

- the original post (called a subject) which begins the thread
- all direct replies to the original post
- all replies to any direct replies
- all replies to any reply

Notifications of topic replies

You can set your user account preferences to indicate the election to receive notifications when replies are made to your forum posts. As a result you will receive an email when someone replies to a subject (thread) you create for a general discussion forum topic. With this setting, you will also receive an email notifying you when another user replies to a reply you posted within a discussion thread. Note: you will not receive notification for replies made to posts originated by another user. See the *Manage My Account* section of your web browser application help system for more information on user preferences.

Note: you will not receive notification when you post something to a forum.

Forum Maintenance

Forum topics, threads and/or replies can be deleted from an asset discussion forum by a Library Administrator or by an asset owner or publisher responsible for the asset. If you hold one of these roles for the asset, you will see a **[Delete]** link to the right of each forum topic, thread and reply message. If you click delete for a reply, the reply is removed from the forum topic. If you click delete for a thread, the thread and all of its messages are removed from the associated topic. If you click delete for a topic, the topic is removed, along with all of its related threads and messages.

Forum Actions:

Forum pages provide access to the following actions.

- Create New Topic - create a new topic in the asset forum.
- Search This Forum - search topics, threads, and replies in the asset forum.
- Create New Thread - create a new discussion thread within a topic of the asset forum.
- Search This Topic - search all threads and messages in a topic.
- Reply - reply to a post.

View Forum Topics

The main forum page displays the name of the forum and provides access to a list of its topics.

- If you are accessing the General Discussion Forum, this page is displayed from the web browser application by clicking on the **Discussion** link available from your top navigation bar. You can display the main page of the General Discussion forum from your rich client application by right clicking on a library connection in your Library Explorer view and selecting **Discuss**.
- To display the main forum page of an asset discussion forum, you can click on the **[Discuss]** link or icon when the asset information is displayed in your web browser application or rich client application. You can also access an asset forum in your rich client application by right clicking on an asset in your Library Explorer view and selecting **Discuss**.

The main page of a forum provides information about the forum and a list of all topics that currently exist. Information for each topic includes its name, the number of threads it contains, the ID of the person who posted the most recent message, and the date and time of its posting.

On this page you can:

- Display a topic page by clicking on the topic name. The resulting topic page lists all current threads within the topic.
- Delete a forum topic. If you are a Library Administrator, an Asset Owner (for an asset forum) or a Publisher, you may see a **Delete** link enabling you to remove a topic from the forum. The system will ask you to confirm the Delete action.

Actions available from the main forum page include:

- **RSS Feed** - Clicking on this icon enables you to subscribe to the discussion forum, which will trigger notifications sent to your RSS reader.
- **[Create New Topic]** - Display a page which enables you to create a new topic.
- **[Search This Forum]** - Displays a page which enables you to search all messages in the forum.

Create New Topic

The Create New Topic page is displayed when you click the **[Create New Topic]** link at the top of the main forum page. The Create New Topic page enables you to create a new topic for the forum.

To create a new topic, enter its name and description and then click **Submit**. When you click **Submit** the topic page is displayed. This page is initially blank, but provides you a link to create the first thread for your new topic. As threads are added to the topic, they will be displayed on this page.

At any point prior to clicking the **Submit** button, you can abort this process by clicking on the **Cancel** button.

View Discussion Threads

The main page for a forum topic provides information about the topic and lists current threads available. You can display the Topic page by clicking on the name of a topic from the main forum page.

Information included for each thread:

- subject/name
- number of messages in the thread
- User ID of the person who created the thread
- date, time and author of the most recent message

On this page you can:

- View all messages in a thread by clicking the thread name.
- Reply to the person who created the thread by clicking the user name link in the *created by* column.
- Delete a thread. Note: threads can only be deleted by a Library Administrator or an Asset Owner or Publisher for an asset forum topic. If you are assigned the applicable role, you will have a **[Delete]** link available to the right of each thread. If you delete a thread, it is removed along with all of its replies. To delete a thread or reply, click the **[Delete]** link. The system will ask you to confirm the delete action.

Links available at the top of the Topic page include:

- **[Create New Thread]** - Displays the Create New Thread page, which allows you to create a new thread in the topic.
- **[Search This Topic] -** Displays the Search page, which allows you to search all messages in the topic.

At the top of the Topic page, there is a count shown of the total number of threads in the topic, and the total number of messages in the topic (which includes both messages posted to the topic and replies).

At the bottom of the Topic page, there is a drop-down list of numeric choices that enables you to choose the number of threads you want to display per page.

Create New Thread

The Create New Thread page is displayed when you click the **[Create New Thread]** link at the top of a topic page. The resulting Create New Thread page enables you to create a new thread for the topic you select. The Create New Thread page displays your name and e-mail address.

To create a new thread, enter its subject, a corresponding message and then click **Submit**. When you click **Submit** the Topic page displays. The thread you just created is listed, along with any other threads that exist for the topic. For each thread, the number of messages in the thread (which is initially one), your user ID, and the date and time the thread was created are also displayed.

At any point prior to clicking the **Submit** button, you can abort this process by clicking on the **Cancel** button.

View Messages

The Thread page is displayed when you select a thread from the topic page. This page is titled with the *Subject* of the thread, and it displays messages and replies currently included in the thread.

The original post for the thread is displayed at the top of the page, and all replies are listed below in a "nested" manner. For example, a reply is listed below and slightly to the right of its original message. The total number of replies in the thread is shown at the top of the reply list.

The following information is listed for each message and reply:

- thread subject/name
- user who created the message/reply
- date and time the message/reply was posted

On this page you can:

- reply to the original thread message or any posted reply by clicking the **[Reply]** link in the middle of the message/reply header. The Reply page displays, enabling you to enter your reply.
- respond to any user who has posted a message. Clicking on the user name link will initiate an email that is pre-addressed to the user.
- Delete a thread or reply. Note: threads and replies can only be deleted by a Library Administrator or an Asset Owner or Publisher in an asset forum. If you are assigned the applicable role, you can delete a thread. Deleting a thread will remove the original thread posting and all thread messages. The system will ask you to confirm the delete action.

There is a **[Create New Thread]** link available at the top of the thread page, which enables you to create a new thread for the topic.

Reply to Message

The Reply page is displayed when you click a **[Reply]** link corresponding to a post within a thread. The Reply page enables you to respond to any message posted in the thread. The Reply page displays your library user account name and e-mail address, and pre-populates the subject field. You can edit the Subject field if desired.

On this page you can compose a reply. If you wish to quote from the original message, click on the **[quote original]** link.

When you finish composing your reply, click the **Submit** button. The system displays the thread page and your reply is posted beneath the message to which you responded.

Search General Forum

The Search page is displayed when you click on the **[Search This Forum]** link at the top of the main forum page. Use the Search page to search all messages in the forum.

To search the forum, enter a search string in the text box and then click the **Search** button.

Select **[Advanced Search]** to enable additional search capabilities.

All messages that contain the string you entered are listed in the search result. The total number of messages that contain the search string you entered is provided. To view any of the messages, click the message name.

Search General Forum Topic

The Topic Search page is displayed when you click on the **[Search This Topic]** link at the top of the main topic page. Use the Topic Search page to search all messages available in this topic.

To search the topic, enter a search string in the text box and then click the **Search** button.

Select **[Advanced Search]** to enable additional search capabilities.

All messages in the topic that contain the string you entered are listed in the search result. The total number of messages that contain the search string you entered is provided. To view any of the messages, click the message name.

Discussion Message

When you click on the **[Reply]** link on a post within a thread, or click on the **[Create New Thread]** link on a discussion topic page, you will see a page that enables you to add information to a discussion thread. This page displays your library user account name and e-mail address.

When creating a new thread, the Subject field is empty. Type in the subject for the new thread, and enter your information into the Message field.

When replying to an existing thread, the Subject field is pre-populated, but you can change it if desired. Enter your information into the Your Reply field. If you wish to quote from the original message, click on the **[quote original]** link.

When you are ready to submit your message, click the **Submit** button. The system displays the thread or topic page and your new message is posted.

Manage My Account

This page enables you to view and modify information about your library user account. You can display this page by clicking on the **[Manage my Account]** link on the top of the main content section of the home page. Some of your account information is managed by a Usage Controller or your organization's user authentication system and can only be viewed, not modified.

From this page you can:

- View, enter or modify your contact information. Information that is managed by your organization's user authentication system is not able to be edited.
- Designate preferences for your account.
- View your designated reporting group, user roles, project assignments, and group roles.

Manage My Account Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

General Information

Information including your Full Name, Email, User Name, Reporting Group and Role assignments is displayed in this section as well as any custom fields configured for your library.

Contact Information [Edit]

Click on this link to display the Edit Contact Information page for your account. In most cases, your library uses an external user authentication system (such as LDAP). You will not be able to edit the information managed by this external system.

Depending on your library's user information configuration, this page may also include fields of information that are managed by your application. If this is the case, the information contained in these fields is made available for you to edit by clicking on the **[Edit]** link.

Contact Information [Change Password]

Click the **[Change Password]** link to display the Change Password page.

Reporting Group

This is the name and description of a group designated as your reporting group. Your reporting group designation may be used to enable you to see reports assigned to this group. It may also be used by some users whose accounts are used for asset production automation and library federation. See the System Administration Guide for more information regarding use of the reporting group for library federation.

Roles

The ability to view information and perform tasks in the library are controlled through role assignments. Most role assignments are used to scope your roles within a group. These group assignments can be seen in the Group Associations section below. In addition, you may be assigned roles that apply to your access to the entire library, which are not scoped to a group. All users have the Asset User role, which provides the ability to search and view assets in your library. If you are an enterprise-scoped Usage Controller, this section allows you to configure whether or not you are also assigned the Library Administrator role for the library. If your library is configured to use LDAP groups for mapping group membership and roles, the user role assignments are assigned in the LDAP configuration, and cannot be changed on this page.

Preferences

This section provides a set of choices you can make for your account.

Local time zone

Click on the drop down list in order to choose your local time zone. This is useful to ensure a correct time stamp for activity when your time zone differs from the time zone of your server installation.

Local time

Displays the current date and time. If this differs from your current date and time, it is an indication that you need to select a different Local time zone. See above.

Auto Save Interval (in seconds)

When editing an asset the edited asset is auto saved every X seconds. To change the interval enter a new time in seconds and click the **[Set]** link.

Notify me about replies to posts...

A forum post is a subject you create for a forum topic (to begin a discussion thread) or a reply you make to another user's subject or reply. Click on the check box to add or remove your election to be notified by email when another library user replies to a post you make in a general forum topic or an asset specific forum topic. If you check this box, you will receive notifications from the type of forum activity described within both the general discussion forum and asset specific discussion forums. Note: This check box does not affect notifications you receive as a result of forum activity for an asset subscription. Asset subscription overrides an unchecked forum post notification check box.

Include total count of assets in query results...

Click this check box if you wish to see the total number of assets found when performing asset queries. Totals will be displayed at the bottom of the Search Results page. Note: Enabling this option may cause queries to run slowly.

Classifier columns for asset lists (from project):

Classifier information can be included for assets on result lists. This section displays the classifiers that are currently designated for inclusion on search result lists. By default, the classifiers established by your active project (if any) are used. If your active project does not designate result classifier columns, the asset type classifier will be included. You can override the default designation with a selection of your own classifiers by clicking on **[Edit].** The classifiers available for you to choose from are those that are required for one or more asset types. See your Library Administrator for more information about the classifiers available for search result lists in your library.

This item will not display on your Manage My Account page if your library is not configured to use enhanced search capabilities.

Properties

If your library is configured to include property information for users, this section will display the user properties set for your account. User properties, if used, will be specific to your library.

Group Associations [Manage Associations]

This table lists the groups defined in your library. You can see the groups for which you have role assignments and for which projects you are a participant.

If you have the role of Usage Controller, you can click on the **[Manage Associations]** link to change your group associations for the groups you are assigned to as Usage Controller. Once you have completed making your changes, click on the **[Save Association Changes]** link. If your library is configured to use LDAP groups for mapping group membership and roles, Group Associations are assigned in the LDAP configuration, and cannot be changed on this page.

Project User

This column includes a check box with a check mark for each project you participate in. A check box is not included in this column for any non-project groups included on your page.

Roles

For each Project or Group, this column indicates the roles (if any) you have been assigned. The responsibilities for the roles you are assigned are scoped to the project or group you are assigned plus any subordinate projects or groups.

Role-specific Asset Presentation

If your library is configured to use role-specific asset information presentation, the Group Roles you are assigned may affect the asset information displayed when this project is active. In this case, you will be offered a set of asset detail information views that correspond to the roles you are assigned for your active project and all the groups above it in your library's group hierarchy. Please see Asset Information for more information about role-specific asset information display.

Group Name

This is the name of the project or group. If this is a project, you can click on the project name to display the project's detail page.

Group Type

This column indicates whether this row of information relates to a project or a non-project group.

Group Description

This is a text description of the project or group.

Change Password page

This page enables you to change the password for your user account. You can display this page by clicking on the **[Manage my Account]** link on the top of the main content section of the home page, then selecting the **[Change Password]** link. Enter your old and new password information, then click the **Save** button to save your changes.

Change Password page content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

User Details

Click on this bread crumb link to display your account settings.

Buttons

When you are finished updating your password, click on the following button of your choice.

- Click on **Save** to record your changes to the profile.
- Click on **Cancel** to close the window and ignore any input or changes you have made.

Library Metrics

Your application and library have the primary purpose of supporting the production and consumption of software development assets, and applying governance to the related processes and asset metadata. Tracking library activity and progress made toward goals is of primary importance to achieving success in these endeavors. To this end, your application provides readily available information related to library activity via application metric pages, standard reports and database views. Database views hold a variety of information that can be used with of a reporting tool of your choice to provide custom report output.

Application Metrics

If your system is configured to support application metrics, you will have metrics provided in your web browser and rich client application metrics pages.

Web Browser Application (Thin Client)

The web browser application provides general metrics related to asset production and asset consumption from three different aspects:

- Asset Metrics - Information regarding projects that have acquired use of the asset and users that are subscribed to the asset.
- Project Metrics - regarding the assets owned by the project and the assets the project has acquired for reuse.
- Group Metrics - regarding the assets owned by the group.

Please see the *Metrics* section of the web browser Help Table of Contents for more information.

IDE Application (Rich Client)

The rich client applications provide general metrics related to assets:

- Asset Metrics - Information regarding projects that have acquired use of the asset and users that are subscribed to the asset.

Please see the *Asset Metrics* section within the *Researching and Acquiring Assets* folder of the Rich Client Help Table of Contents for more information.

Reporting Metrics

In addition to metrics displayed within your applications, you have the capability to view reports and optionally develop custom reports covering the full spectrum of library activity.

- Your library will have some standard reports available to you, unless the configuration of your installation doesn't support this. Available reports can be viewed by initially clicking on the **[View All]** link in the Reports section of your web browser application home page. Please see your System Administrator for information about accessing standard reports, if they are not available to you on your Reports list page.
- You can develop custom reports using the reporting tool of your choice with the database reporting views made available to you by your application.
    - Access to custom reports can be added to your web browser application.
    - In addition, you can run reports on the database views by establishing a connection to the reporting views and using the Reporting Client Application of your choice.

Please see the *Reporting* section of the web browser application Help Table of Contents for more information. You may also see your System Administrator for information on accessing the Reporting Tool Kit for customizing standard report designs and application metrics.

Asset Metrics

This page displays summary and detailed information for an asset regarding projects that have acquired its use and users that are subscribed to the asset. This page is only available if supported by the configuration of your installation. If available, you can display this page by clicking on the **[Show Metrics]** link from an asset's detail page.

This page displays information related to projects using the asset and users subscribed to the asset. From this page you can:

- View summary information about a count of projects in your library that have received full approval to use the asset.
- View summary information about a count of users in your library that are currently subscribed to the asset, in order to be kept up to date on asset updates, new versions and forum discussion activity.
- View detail information about the projects in your library that have received full approval to use the asset.
- View detail information about the users in your library that are currently subscribed to the asset.

Asset Metrics page Contents

This page contains the following selections and information:

Acquisitions: [Show Details]/[Hide Details]

Click on this link to display or hide information about the projects that have acquired the asset for use.

Subscriptions: [Show Details]/[Hide Details]

Click on this link to display or hide information about the users that are subscribed to the Asset.

Acquisitions - Summary

The process of recording the reuse of an asset by a project or asset is initiated by project participant clicking on the **[Acquire]** link on the asset's information page while the project is active. Clicking on **[Acquire]** begins the approval process designated by your library's configuration for the consuming project and the asset, which is owned by a group in your organization. Once the request to acquire the asset for use on the project has met all approvals required by the applicable process, the asset is registered to the project, and this page will show an increment added to the total "Acquisitions" of the asset. Note: each project can only record one acquisition of an individual asset.

Acquisitions - Details

The details provided for Asset Based Acquisitions of this asset include:

- Acquiring Asset - The name of the consuming asset.
- Acquiring Relationship - Displays the consuming asset type - relationship name - and the acquired asset type. Example: application - consumes - service.
- Project - The name of the project which has registered the asset.

The details provided for Project Based Acquisitions of this asset include:

- Project - The name of the project which has registered the asset.
- Project Manager(s) - The name of each project manager for the project.
- Email - The email address for each project manager.

Subscriptions - Summary

Any user can subscribe to an asset from the asset's information page by clicking on its **[Subscribe]** link. Subscription to an asset can be removed from the asset's information page (click **[Unsubscribe]**) or from the Subscription List page. Subscribing or removing subscription to an asset will increase or decrease the count of subscriptions shown for this asset.

Subscriptions - Details

The details provided for Subscriptions to this asset include:

- Users - The Full Name of the users who have subscribed to this asset.
- Email - The email address for each user.

Group Metrics

This page displays summary and detailed information for a non-project group regarding the assets it owns. This page is only available if supported by the configuration of your installation. If your installation is configured to display application metrics and you are a Usage Controller for the group, you can display this page by clicking on the **[Show Metrics]** link from group detail page. The group detail page is available by selecting the project from your groups list page.

This page displays information related to assets owned by your designated group. From this page you can:

- View summary information about assets owned by the group, grouped by asset type.
- View detail information about the assets owned by the group, including the asset name, version and information about projects acquiring the asset.

Group Metrics page Contents

This page contains the following selections and information:

Owned Assets - Asset Type Details [+]/[-]

For each asset type, click on this link to display or hide detailed information about the assets owned by this project.

Owned Assets - Summary

Each asset in your repository is owned by a group or a project. Ownership of an asset means that the creation, maintenance and governance of the asset's metadata and the asset's reuse is the responsibility of the users who have been assigned roles related to asset ownership responsibilities for this group. This metrics page shows a section of information on the assets owned by the group you have designated.

The summary information provided for Owned Assets includes:

- Asset Type - The name of the type of asset. A summary of information is presented for each type of asset.
- Total - The number of assets of this type that are owned by this group.
- # Acquired for Reuse - A count of the number of acquisitions that have been made for assets of this type (that are owned by the group).

Owned Assets - Details

In addition to the summary information provided for Owned Assets, expanding the details section displays for each asset type:

- Name - The names of the assets of this type that are owned by the group.
- Version - The corresponding asset version for each asset named.
- Acquired by - The name of the Project(s) that have acquired each asset, if any.
- Acquiring Asset - The name of the consuming asset.
- Acquiring Relationship - Displays the consuming asset type - relationship name - and the acquired asset type. Example: application - consumes - service.

Project Metrics

This page displays summary and detailed information for a project regarding the assets it owns and the assets it has acquired for reuse. This page is only available if supported by the configuration of your installation. If your installation is configured to display application metrics you can display this page by clicking on the **[Show Metrics]** link from an project detail page. The project detail page is available from a link on the home page when the project is your active project.

This page displays information related to assets owned and acquired by your active project. From this page you can:

- View summary information about assets owned by the project, grouped by asset type.
- View summary information about assets acquired by the project, grouped by asset type.
- View detail information about the assets owned by the project, including the asset name, version and information about projects acquiring the asset.
- View summary information about assets acquired by the project, including the asset name, version and the group owning the asset acquired.

Project Metrics page Contents

This page contains the following selections and information:

Owned Assets - Asset Type Details [+]/[-]

For each asset type, click on this link to display or hide detailed information about the assets owned by this project.

Acquired Assets - Asset Type Details [+]/[-]

For each asset type, click on this link to display or hide detailed information about the assets acquired by this project.

Owned Assets - Summary

Each asset in your repository is owned by a group or a project. Ownership of an asset means that the creation, maintenance and governance of the asset's metadata and the asset's reuse is the responsibility of the users who have been assigned roles related to asset ownership responsibilities for this project. This metrics page shows a section of information on the assets owned by your active project.

The summary information provided for Owned Assets includes:

- Asset Type - The name of the type of asset. A summary of information is presented for each type of asset.
- Total - The number of assets of this type that are owned by this project.
- # Acquired for Reuse - A count of the number of acquisitions that have been made for assets of this type (that are owned by the project).

Owned Assets - Details

In addition to the summary information provided for Owned Assets, expanding the details section displays for each asset type:

- Name - The names of the assets of this type that are owned by the project.
- Version - The corresponding asset version for each asset named.
- Acquired by - The name of the Project(s) that have acquired each asset, if any.

- Acquiring Asset - The name of the consuming asset.
- Acquiring Relationship - Displays the consuming asset type - relationship name - and the acquired asset type. Example: application - consumes - service.

Acquired Assets - Summary

The process of recording the reuse of an asset by a project is initiated by project participant clicking on the **[Acquire]** link on the asset's information page while the project is active. Clicking on **[Acquire]** begins the approval process designated by your library's configuration for the consuming project and the asset, which is owned by a group in your organization. Once the request to acquire the asset for use on the project has met all approvals required by the applicable process, the asset is registered to the project, and this page will show an increment added to the total "Acquisitions" of the asset. Note: each project can only record one acquisition of an individual asset.

The summary information provided for Acquired Assets is grouped by Asset Type and includes:

- Asset Type - The name of the type of asset. A summary of information is presented for each type of asset.
- Total - A count of the assets of this type that have been acquired by your active project.

Acquired Assets - Details

In addition to the summary information provided for Acquired Assets, expanding the details section displays for each asset type:

- Name - The names of the assets of this type that have been acquired by the project.
- Version - The corresponding asset version for each asset named.
- Owned by - The name of the Group owning the asset acquired.
- Acquiring Asset - The name of the consuming asset.
- Acquiring Relationship - Displays the consuming asset type - relationship name - and the acquired asset type. Example: application - consumes - service.

Library Reporting

There are a number of informational items or sets of events that occur in your library and its asset source that you may wish to see in a report format.

Your library supports reporting in the following manner:

- Your application provides a set of standard reports for your library. Depending on the configuration of your system, the reports may be available to you on the Reports List page displayed in the Reports section of your home page.
- In addition, your library offers a number of views to the database tables produced and maintained by your solution. The database views serve as relational tables available as input tables used in your reports. They are fully documented as to their contents and remain consistent from one release to the next of the product, although additional views and view columns may be added.
- Custom Reports may be designed and prepared outside of your application. You can prepare needed reports through use of your choice of report generation applications.
- If you want to make reports you have created available from your web browser application, either for your own use or to share with others, you can establish references in your application to the report URLs available on your report server. These references are referred to as report entries and each includes a reference to the actual report in the form of a URL, similar to a Bookmark or Favorite in a browser.
- You can see the reports you've most recently viewed on your Home page, in the reports section. You can display all the reports available to you by clicking on the **[Manage Reports]** link in Reports section of your Home page, then clicking on the Reports breadcrumb. This will display the Reports list page. Report entries included in your list depend on what group you report to, what project(s) you are assigned to, and what reports you have chosen to add to your own Workspace list. Click on the name link for the report you want to run to see its result in a new window. Note that you may be asked to login to the report server for the datasource accessed by your report.

See your System Administrator for information about installing standard reports for your library.

Standard Reports

Lifecycle Manager provides a set of standard reports for use with your library. Many of these standard reports are accessible from your web browser application. To run a report for the first time, choose the **Manage Reports** link in the Reports section of your home page to list the reports available. Once you access a report, it will be listed in the reports section of your home page.

Standard reports include:

- Governance Monitoring
- Repository Savings
- Search Analysis
- Stale Assets
- Success Metrics
- User Assignments
- What's Hot
- What's New
- Data Set Controller Example

Report Parameters and URLs

Report designs include a number of parameters that can be used in the running of the report. You can specify parameter values on the report URL itself as a URL parameter. Alternatively, when the report is run, a parameter dialog may be presented which allows you to enter parameter values to override the default values. This dialog might not appear in some cases, for example if *all* of the parameters have default values assigned to them in the report design. Refer to the Birt documentation for more information about parameters.

You can find the URL used to run a standard report from your web browser application by opening the associated report entry. To do so, select **Manage Reports** from the report section of your home page. Existing report entries are listed. Click **Edit** to open a report entry and view or change the URL being used to run the report.

Here are some example options available for use with report URLs:

- **To add a value for the maximum_count parameter of the What's New report -** append the following to the report URL: **&maximum_count=100**
- **Filter report content by context** - use a context parameter provided by your application. For example, you can limit the content of your report based on the context of your user account or your active project. See Appendix K of the Library Configuration Guide or your Library Administrator for more information.

When passing parameters on the URL, you must pass the parameter's *name*, not the user-friendly *prompt text*. The report descriptions that follow include the prompt text, followed by the parameter name in parentheses.

Governance Monitoring Report

Shows detailed information for all completed and active requests, by request type. Request types include those for asset production and maintenance, asset acquisition and asset publishing activities. Report includes the average time to complete each type of approval.

This report will display the duration of each request in days. If a request is still active, the duration will be calculated to the current time. Only the complete requests will figure into the average duration.

Report Parameters

Parameters that can be specified when this report is run include:

- Begin Date (begin_date)
- End Date (end_date)

Repository Savings Report

Lists assets produced and the ROI and time savings based on acquisitions. This report is designed with an embedded parameter to differentiate the ROI calculation used for Web Service Asset type assets from the ROI calculation used for your other types of assets. (The Web Service Asset types value defaults to WEB SERVICE in this report.)

Formulas Used

The ROI calculation used in this report incorporates the ROI calculations for web services based on research provided by Alan Himler and Dr. Jeffrey Poulin. (Please see the SOA ROI white paper for more information). For example, the Web Service ROI calculation formula is:

CLOE/1.2/unit_conversion * 0.9 * labor_rate*acquisitions.

All other types of assets use this ROI calculation formula:

CLOE/1.5/unit_conversion * 0.8 * labor_rate*acquisitions.

The time saved calculation for assets with creation level of effort is the following:

For Web Service assets: (CLOE/1.2) * 0.9 * Acquisitions
For non-Web Service assets: (CLOE/1.5) * 0.8 * Acquisitions

Report Parameters

Parameters that can be specified when this report is run include:

- Begin Date (begin_date)
- End Date (end_date)
- Enter the units creation level of effort is specified in (units) - The 'units' parameter controls what time unit is used to measure the creation level of effort classifier (hours, days, weeks, months). Default is weeks.
- Enter Labor Rate per year (labor_rate) - The 'labor_rate' parameter is used in the ROI calculation and indicates the development labor cost per year. Default is 120000.
- Web Service Asset Type (web_service_asset_type) (hidden) – The 'web_service_asset_type' parameter is the asset type used for Web Service assets. This is a hidden parameter that can be specified on the report URL. Default "WEB SERVICE."
- Enter the name of the classifier that represents the Creation Level of Effort value for the asset (cloe_classifier) (hidden) - The 'cloe_classifier' parameter is the classifier name used for creation level of effort. The name should be specified as the "internal" classifier name, not the display name. This is a hidden parameter that can be specified on the report URL. Default is "creation-level-of-effort."
- Enter the name of the classifier that represents the Developer License Cost value for the asset (cost_classifier) (hidden) - The 'cost_classifier' parameter is the classifier name used for developer license cost. The name should be specified as the "internal" classifier name, not the display name. This is a hidden parameter that can be specified on the report URL. Default is "developer-license-cost."
- Web Service Asset Types (web_service_asset_types) (hidden) - The 'web_service_asset_types' parameter is a comma-separated list of asset types associated with Web Service assets. This is a hidden parameter that can be specified on the report URL. Default is "SERVICE,SERVICE

IMPLEMENTATION."

Search Analysis Report

Includes the percent of successful searches and detail about unsuccessful searches for the given time period. A successful search is one that returned at least one asset. Searches based on empty criteria values are excluded. Totals for successful and unsuccessful searches and the corresponding percentage are given.

Note: This report requires that events with a severity level of "Secondary Information" be included in your library's audit trail. See your Library Administrator for information on the configuration of your library's audit trail events.

Report Parameters

Parameters that can be specified when this report is run include:

- Begin Date (begin_date)
- End Date (end_date)

Stale Assets Report

Lists assets that have not been requested for reuse in the given time period. This information is grouped by asset type and sorted by asset name/version. You can easily exclude asset types or assets with status values that aren't of interest.

Report Parameters

Parameters that can be specified when this report is run include:

- Begin Date (begin_date)
- End Date (end_date)
- Enter asset types to exclude from report (exclude_asset_types) - enter one or more asset types in a comma separated list.
- Asset status classifier name (status_classifier)
- Exclude status values (exclude_status_values)

Success Metrics Report

This report includes information about a number of various success indicators for your library. For example, it presents information about asset contributions to the library as well as reuse activity by asset and by project. A percentage of successful searches is also given. Information is presented in graphic form for asset registration and project reuse activity in addition to other tabular and total presentation.

Report Parameters

Parameters that can be specified when this report is run include:

- Begin Date (begin_date)
- End Date (end_date)
- Enter asset types to exclude from report (exclude_asset_types) - enter one or more asset types in a comma separated list.

What's New Report

Lists the N most recently updated assets in the given time period, where N is a numeric value you can enter when the report is run.

Report Parameters

Parameters that can be specified when this report is run include:

- Begin Date (begin_date)
- End Date (end_date)
- Enter the maximum number of assets to display (maximum_count) - the maximum number of most recent assets to display
- Enter asset types to exclude from report (exclude_asset_types) - enter one or more asset types in a comma separated list.

What's Hot Report

Lists assets with the most registered acquisitions (that is, fully approved acquisitions) in the given time period.

Report Parameters

Parameters that can be specified when this report is run include:

- Begin Date (begin_date)
- End Date (end_date)
- Enter the maximum number of assets to display (maximum_count) - the maximum number of top reused assets to display

User Assignments Report

Lists active users of your library. Report information includes the groups and projects where the users have a role assigned and the projects they are participating in. User private workspaces are not included. Totals are given for the number of users in the table, the total active users and the total inactive users.

Report Parameters

This report does not include parameters.

Data Set Controller Example Report

Shows the relationship chain of an asset as an example of utilizing a scripted Data Set. A scripted Data Set can be used to interact with the repository APIs in cases where obtaining the data through normal SQL is difficult.

The report constructs the DataSetController which is available in repository installations. DataSetController offers several methods to recurse relations, search asset artifacts using XPath expressions, and construct repository API classes. The documentation for DataSetController can be found in reportUtilities.zip.

Report Parameters

Parameters that can be specified when this report is run include:

- Relationship to follow (relationshipType) – the relationship which will be followed
- assetId (assetId) – the id of the asset to start the relationship chain from
- Relationship direction (incoming) – 'true' to follow incoming relationships, 'false' to follow outgoing relationships, null for either

Create a Report

Your Library Supports a Wide Variety of Reporting tools

Even though your installation includes the Eclipse-based reporting tool called BIRT, which is used to support standard and custom reports and application metrics, your library also provides you with the option to select one or more different report generation applications to use in addition. The capability to support a variety of reporting tools is made possible through the Reporting Views available in the database used by your application. Reporting view are read-only database views that include a wide base of information produced by your libraries and the activity within them. Reporting views provide data in a form that can be accessed and utilized as input to any report generation application for relational databases. Please see Reports and Reporting Views for more information.

Report Generation

If your installation has access to a report application server, reports that can be run by that server application can provide run-time information to library users via your web browser application. Reports that are not associated with a report application server can provide static report output that can be shared with library users also via the web browser application. As a third option, reporting applications (whether client or server based) can access the database views and provide reporting output independent from the web browser application. See your System Administrator for information on the type of reporting available to you.

Creating Your Own Report

If you plan to use the BIRT client to produce custom reports, see About BIRT for more information. If you are planning to use a different reporting application, here are a list of general steps you would take to produce a custom report.

1. Examine the database view documentation to determine the data available to you.
2. Decide on the output of a report you would like to create. Include such things as the data included for output, subtotals needed, how the data will be sorted and grouped and if any parameters will be entered by the person running the report.
3. Get an authorized login and password to the data source which holds your library database. (This is where you will find the database views to supply the report data.).
4. Execute your reporting client application and use it to establish a connection to your data source. Note: you will need to have access to a driver for use in accessing the data that is specific to your particular database (such as Oracle, DB2® Universal Database (UDB) or SQL Server). See your Database Administrator to obtain the driver that is best suited to your configuration. Once you have downloaded the appropriate driver to your client, you can designate the driver to be used within your reporting application.
5. At this point it is important to note that the database connection established in step 4 will make all the database views available to you that are applicable to your installation. This means that if you have multiple Libraries created, there will be a complete set of database views for each of those libraries. Each library is associated with a Library ID and each view has the ID of the library it is associated with appended to the end of its view name. You can determine the Library ID that is associated with a particular library by logging into that library and displaying your Support Center page by clicking on the corresponding link on your top navigation bar. On the page displayed as a result of this action, there are two numbers separated by a colon following the name of the library displayed on this page. The Library ID is the number following the colon.
6. Use your reporting application to designate the data (based on the database views for your library) you will use for your report. Depending on your report requirements and the application you are using, you may also create an SQL command in your report design to provide the resulting set of data you will use for your report or a portion of your report.
7. Proceed to create and test your report design until you consider it complete.
8. Save the report design to the report directory on your report application server, if applicable.

9. If you want to access this report from the web browser application, determine the URL associated with your report.
10. Login to your library and navigate to the Reports list page.
11. Choose the Manage My Reports link from the displayed Reports List Page.
12. Select the appropriate create link to display the report entry create page.
13. Create and Save the report entry, which will make this report available to run from your report list.

BIRT - Business Intelligence Reporting Tool

Your library includes access to the Eclipse-based reporting system called Business Intelligence and Reporting Tools (BIRT). BIRT is an Eclipse-based open source reporting system for web applications. There are two main components to BIRT: a report designer based on Eclipse and a runtime component that you can add to your application server. The run-time BIRT component is automatically included with your installation. In addition to the use of BIRT in providing a reporting engine for your library as described in the previous section, you may also choose to use the BIRT client application to create new report designs of your own or to customize existing BIRT report designs such as the standard report designs. The BIRT Report Designer client is available to you from the Eclipse support site (details provided below). Please see your System Administrator for more information on your application's use of BIRT.

BIRT provides the capability for you to take advantage of three application features:

- Report-like metrics displayed in your web browser application for assets, projects and groups (Note: Group metrics are available to Usage Controllers only.)
- Report-like metrics displayed in your rich client applications for assets
- Standard reports made available on the reports list page of your web browser application

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Using BIRT to Create a Custom Report

High Level View of Tasks

1. Install BIRT Report Designer on the client system you will use to create report designs. You may have multiple users of BIRT Report Designer in use for your library reporting. Each user can determine whether to install the Report Designer as a standalone client or as a plug-in to their Eclipse IDE application. Your Akana application requires use of a particular version of BIRT. When using the Report Designer, be sure to use version 2.6.2. For installation instructions, please access the BIRT archive web site at http://archive.eclipse.org/birt/downloads/build.php?build=R-R1-2_6_2-201102191842.
2. Proceed to create report design files with your BIRT reporting tool, and save them to your BIRT server location. Here is an example BIRT reports location: $LIB_ROOT/customer/logidex.war/reports. Please see your System Administrator for the specific location.
3. Determine the URLs for each of your reports.
    - Here is an example of a report URL for your system, if SSL is not being used. Replace bold text as necessary. http://**hostname**/**contextroot**/birt/frameset?_report=/reports/**reportname**.rptdesign. Please see your System Administrator for the specifics of your BIRT report URLs.
    - If your configuration uses SSL, the reporting link would be modified accordingly. For example: https://**hostname:sslport**/**contextroot**/birt/frameset?_report=/reports/**reportname**.rptdesign. Please see your System Administrator for the specifics of your BIRT report URLs.
    - You can include context parameters in your URL to filter report content based on library, user, active project and the group associated with the report. For information on these context parameters, see Appendix K of the Library Configuration Guide. This guide is available from the Akana™ support site or your Library Administrator.
4. Login to your library and create report entries to reference the URLs of the reports you'd like to run. Enter the URL for each report as described in step 3.
5. Use your library Home page or the Reports List page to select reports and run them as desired.

In more detail, designing a report from scratch

Once you have established your BIRT runtime component installation, here is a description of the tasks you will undertake to design reports and make them available to library users (including yourself) using BIRT.

1. Examine the database view documentation to determine the data available to you.
2. Decide on the output of a report you would like to create. Note: BIRT Report Designer enables the use of multiple objects in one report, each of which can be based on a different set of data. In addition, BIRT Report Designer allows you to design your layout so that the output included in each separate object can be displayed next to each other horizontally in addition to the "vertical" sub report placement available in most report generation applications. Refer to the help system in the BIRT Report Designer application for more information on this capability.
3. Get an authorized login and password to the data source which holds your database. (This is where you will find the database views to supply the report data.)
4. Execute your BIRT client application and use it to establish a connection to your data source. Note: you may use a JDBC driver, for example, for your particular database (such as Oracle, DB2® Universal Database (UDB) or SQL Server) to access the database. Once you have downloaded the appropriate driver to your client, you can go into the **Manage Drivers** button located on the Data source wizard to add it. Once the host name and the driver is identified in the data source wizard, be sure to test the connection by clicking on the **Test Connection** button. Note: see your Database Administrator to obtain the driver that is best suited to your configuration.
5. At this point it is important to note that the database connection established in step 4 will make all the database views available to you that are applicable to your installation. This means that if you have multiple Libraries created, there will be a complete set of database views for each of those libraries. Each library is associated with a Library ID and each view has the ID of the library it is associated with appended to the end of its view name. You can determine the Library ID that is associated with a particular library by logging into that library and displaying the Support Center page by clicking on the corresponding link on your top navigation bar. On the page displayed as a result of this action, there are two numbers separated by a colon following the name of the library displayed on this page. The Library ID is the number following the colon.
6. Use BIRT Report Designer to designate the data sets (based on the report views for your library) you will use for your report. Data sets are defined by an SQL command that provides the resulting set of data you will use for your report or a portion of your report.
7. Proceed to create and test your report design until you consider it complete. Refer to the BIRT Report Designer tutorials and Help System for support.
8. Save the report design to the report directory on your BIRT application server.
9. Determine the URL associated with your report.
10. Login to your library and navigate to the Reports list page.
11. Choose the Manage My Reports link from the displayed Reports List Page.
12. Select the appropriate create link to display the report entry create page.
13. Create and Save the report entry, which will make this report available to run from your report list.

Modify an Existing BIRT Report Design

You can modify an existing BIRT report design in order to use the report for a different library or with different content. Please refer to the BIRT application help system for information. If you wish to modify the report design for a standard report, please see your System Administrator for the report designs and information specific to modifying these reports.

Report Views

Your application produces and maintains the following views related to your database information. These views make it possible to buffer the changes in underlying tables used by the application that occur with product updates from the information you use for reporting and other purposes outside of this application. Over time, more views may be added and more fields (columns) may be added to existing views; however, we make every effort to avoid changing or removing existing fields or views that you may rely on. In some cases, a major upgrade to product functionality may make it impractical to honor existing view information. Please refer to release documentation for information on these special circumstances if and when they should occur.

In general, your application produces a separate view for each library in your installation corresponding to each of the following view documentation. In this case, each library's view name ends with _XXX where XXX represents the library's ID. There are some exceptions to this. Some views contain information for your repository as a whole. The documentation for these views denotes this in the header information.

Entity Identifiers

You may notice that there are two means of designating a unique identifier for an entity: by ID and by URN. URNs are a unique way of identifying the entity with the context of a single library; whereas IDs are a means of uniquely identifying an entity beyond the context of a single library.

In the first of two specific examples, in the RPT_ASSET view there is both an ASSET_URN and an ASSET_ID. Asset ID is based on the RAS (Reusable Asset Specification) concept of Asset ID which identifies an asset uniquely regardless of where it resides. By contrast, the ASSET_URN is an identifier assigned an asset that uniquely identifies it within a particular library. The ASSET_URN for an asset has meaning only within the context of the library to which the asset has been published. In general, when referring to an asset from an asset source, the Asset ID is used; and when referring to an asset that has been published to a library, the Asset's URN is used. In general, the ASSET_ID is used to identify an asset in an asset repository, whereas the ASSET_URN can be used for an asset published to a library.

In the second example, the RPT_USER view contains a column for both and USER_ID. The USER_URN for a user is unique within the context of a particular library. It is useful only within the context of this library. A USER_ID uniquely identifies a user within your installation and is not duplicated between libraries.

There are other instances of Urns used to identify entities specific to a library. However, the above two examples are the only instances where both methods of identification are used for the same entity.

Compound Classifiers

Your application enables you to define compound classifiers in your global definition template. Like non-compound classifier values, compound classifier values added to an asset result in the creation of a row in the RPT_CLASSIFIER view. However, in the case of a compound classifier, values for the separate fields of a compound classifier are included in one column: the column associated with the type of information represented. Each field is separated by a vertical bar character (**|**). You can use your report generation facility or application to parse the individual field values if necessary.

Boolean Data Types

Many reporting views include columns consisting of Boolean values. These actual values consist of 1, to represent True or Yes, and 0 (zero) to represent False or No.

Database Views Available

Click on the name of a database view for information about view use and content.

RPT_ALL_ARTIFACT - Published artifacts

RPT_ALL_CATALOG_ARTIFACT - artifacts in the library's asset source

RPT_ASSET - published assets

RPT_ASSET_ACQ_REQ - Requests to acquire assets

RPT_ASSET_ARTIFACT_INFO - by-value artifacts for all assets in the asset source (both published and unpublished)

RPT_ASSET_CHANGE - shows a history of all changes made to the asset

RPT_ASSET_CLASSIFIER - classifiers in all published assets

RPT_ASSET_FORUM - asset-specific forums existing in your library

RPT_ASSET_FORUM_MESSAGES - asset-specific forum messages

RPT_ASSET_FORUM_TOPIC - asset-specific forum topics

RPT_ASSET_FUNCTION - Asset functions as identified in UML model published with asset

RPT_ASSET_PUB_REQ - Asset publish requests for manual publish

RPT_ASSET_REGISTRATION - Asset registrations are the result of an asset acquisition request reaching full approval

RPT_ASSET_RELATIONSHIP - Asset relationships for published assets

RPT_ASSET_REQUEST - Requests that are created when a governed process is triggered in the library

RPT_ASSET_REQUEST_ACTION - Information on actions taken on asset requests

RPT_ASSET_REQUEST_APPROVAL - The approvals requested as a result of your library's enablement of a governed process

RPT_ASSET_REQUEST_PROPERTY - The properties associated with asset requests

RPT_ASSET_SOURCE - The asset sources available in your repository

RPT_ASSET_SUBSCRIPTION - User subscriptions to assets

RPT_ASSET_XML - XML content of a published asset

RPT_AUDITTRAIL - A log of library events

RPT_AUDITTRAIL_COMBINED - Library events and their associated properties

RPT_AUDITTRAIL_PROPERTIES - Properties associated with library event

RPT_CAPTURE_TEMPLATE - Information about the asset capture templates in use in the library

RPT_CATALOG_ASSET - assets in the library's asset source. Includes published and unpublished assets

RPT_CATALOG_ASSET_XML - XML content of an asset from the catalog

RPT_CATALOG_REL_PROPERTIES - asset relationship properties

RPT_CLASSIFIERS - asset classifiers, where each row contains multiple classifiers for an asset

RPT_CONTACT - contact records created for all the libraries of your repository

RPT_DRM - Reference model information

RPT_FUNCTION_MAPPING_INFO - mappings from assets to reference model functions; used with reference models based on direct mappings

RPT_GENERAL_FORUM - General forums existing in your library

RPT_GENERAL_FORUM_MESSAGES - General forum messages

RPT_GENERAL_FORUM_TOPIC - General forum topics

RPT_GLOBAL_DEF_TEMPLATE - Information on the Global Definition Template of your library.

RPT_IC - Idealized components for reference models based on direct mappings

RPT_IC_FUNCTION - Functions for idealized components in reference models based on direct mappings

RPT_IC_INTERFACE - Interfaces for idealized components in reference models based on direct mappings

RPT_LIBRARY - Libraries included in your repository

RPT_ORG_GROUP - Groups included in your library

RPT_ORG_GROUP_HIERARCHY - Group hierarchy information for your library

RPT_ORG_GROUP_USER_ROLE - Group role assignments in your library

RPT_PROJECT - Library groups designated as projects

RPT_PROJECT_PARTICIPANT - Project participants

RPT_PROPERTY - Properties that have been defined in your library

RPT_QUERY_SUBSCRIPTION - Information on alerts library users have set on searches

RPT_REQUEST_XML - XML content of requests

RPT_SEARCH_SPECIFICATION - Search specification information

RPT_TAG - Tag information

RPT_USER - Library user information

View Documentation

RPT_ALL_ARTIFACT

Published artifacts

Column name	Type	Length	Unique Key	Description
ASSET_URN	VARCHAR2	70	true	Unique identifier for the asset in this library.
ASSET_ID	VARCHAR2	400		Asset identifier from the asset XML. Unique in this installation.
ARTIFACT_ID	VARCHAR2	400	composite	Unique artifact identifier
ARTIFACT_FILE_NAME	VARCHAR2	640		The file name of an artifact included in the asset's metadata.
ARTIFACT_FILE_EXTENSION	VARCHAR2	60		Extension used for artifact type
ARTIFACT_NAME	VARCHAR2	1020		Artifact name
ARTIFACT_DISPLAY_NAME	VARCHAR2	1020		Display name of artifact
ARTIFACT_CATEGORY	VARCHAR2	1020		Category of the request.
ARTIFACT_CONTAINMENT	VARCHAR2	20		by-value, by-reference or by-description

ARTIFACT_REFERENCE	VARCHAR2	600		URL used to artifact

RPT_ALL_CATALOG_ARTIFACT

Artifact in the library's asset source

Column name	Type	Length	Unique Key	Description
ASSET_ID	VARCHAR2	100		Asset identifier from the asset XML. Unique in this installation.
ARTIFACT_ID	VARCHAR2	400	composite	Unique artifact identifier
ARTIFACT_FILE_NAME	VARCHAR2	640		The file name of an artifact included in the asset's metadata.
ARTIFACT_FILE_EXTENSION	VARCHAR2	60		Extension used for artifact type
ARTIFACT_NAME	VARCHAR2	1020		Artifact name
ARTIFACT_DISPLAY_NAME	VARCHAR2	1020		Display name of artifact
ARTIFACT_CATEGORY	VARCHAR2	1020		Category of the request.
ARTIFACT_CONTAINMENT	VARCHAR2	20		by-value, by-reference or by-description
ARTIFACT_REFERENCE	VARCHAR2	2400		URL used to artifact

RPT_ASSET

Published assets

Column name	Type	Length	Unique Key	Description
ASSET_URN	VARCHAR2	70	true	Unique identifier for the asset in this library.
ASSET_ID	VARCHAR2	100		Asset identifier from the asset XML. Unique in this installation.
ASSET_NAME	VARCHAR2	320		Asset name
ASSET_VERSION	VARCHAR2	40		Asset version
ASSET_DESCRIPTION	VARCHAR2	480		Asset short description
				USER_URN (user identifier) for a user identified as the author of this asset. This field is populated only in the case

ASSET_AUTHOR_URN	VARCHAR2	70		where the asset has a value for the "Author" classifier where the first and last name matches a library user's first and last name. If a match is found, this field is populated.
ASSET_SUBMITTER_URN	VARCHAR2	70		Unique identifier of the user in this library who last submitted the asset for publish
ASSET_CROSS_CHARGE_DEFAULT	VARCHAR2	20		Cross-charge amount designated in asset publish information to be used unless overridden by acquisition request cross charge amount.
NOTIFY_OWNER_OF_ACQ_REQ	CHAR	1		Boolean indicating whether or not system will notify the asset owners (all asset owners in the asset's owning org group) when the asset is requested for acquisition. This field is populated from the asset's publish information. 0 indicates no notification; 1 indicates notification
ASSET_AUTHORIZATION_REQUIRED	CHAR	1		Boolean indicating whether or not system will require Asset Owner authorization in order to register an asset to the requesting project. This field is populated from asset publish information. 0 indicates no notification; 1 indicates notification
ORG_GROUP_URN	VARCHAR2	70		Unique identifier of the group assigned ownership of the asset
ASSET_CREATION_DATE	DATE			Date Asset was first published to the library.
ASSET_MODIFIED_DATE	DATE			Date Asset was last published to the library.

RPT_ASSET_ACQ_REQ

Requests for the reuse of an Asset by a Project participant. Note: Asset acquisition requests are also recorded in the RPT_ASSET_REQUEST view, along with all other types of asset requests. The RPT_ASSET_ACQ_REQ view remains active, and provides a separate view containing only requests related to asset acquisition.

Column name	Type	Length	Unique Key	Description
CONSUMING_ASSET_ID	VARCHAR	4000		Unique identifier of the Asset requesting the acquisition of the asset to be consumed.
CONSUMING_RELATIONSHIP	VARCHAR	4000		The name of the relationship type used for an asset-based acquisition.
				Unique identifier of the Asset

ASSET_URN	VARCHAR2	70	composite	requested in this library.
ORG_GROUP_URN	VARCHAR2	70	composite	Unique identifier of the Project for which the user is requesting the Asset
USER_URN	VARCHAR2	70		Unique identifier of the Project participant initiating the asset reuse request
ASSET_ACQ_REQ_STATUS	VARCHAR2	30		Request status. Identifies the state of request approval. Note: The status values changed in v 5.0 to accommodate the new feature of asset acquisition governance configuration. Current examples include "Pending <Role Name> Approval", "<Role Name> Rejected", and "Registered" where <Role Name> may be a standard role or a custom role defined by your library's process configuration. Please see the v 5.0 Readme documentation for specific changes
ASSET_ACQ_REQ_CROSS_CHARGE_AMT	VARCHAR2	20		Currency and value of a cross charge amount designated for this request. (Note: this amount can be used to override any default cross charge amount provided in the asset's publish information.)
ACQUIRED	INT			If and when the acquisition request is approved, this field indicates the registration of the asset to the acquiring project/asset.
ASSET_ACQU_REV_STATUS	VARCHAR	400		Provides the status (if any) of a request to revoke the registration of the asset to the acquiring project/asset.
ASSET_ACQ_REQ_CREATION_DATE	DATE		composite	Date acquisition request was created
ASSET_ACQ_REQ_MODIFIED_DATE	DATE			Date acquisition request was updated

RPT_ASSET_ARTIFACT_INFO

Information on asset artifacts. Each by-value type artifact for an asset is represented as a separate row of this view. Note: this view includes information on by-value artifacts (only) for all assets (published and unpublished) in your library's asset source.

Column name	Type	Length	Unique Key	Description
ASSET_ID	VARCHAR2	100	composite	Unique Asset identifier from the asset XML

ASSET_SOURCE_ID	VARCHAR2	100	composite	Unique Asset source identifier (Installation ID:Library ID)
ARTIFACT_ID	VARCHAR2	100	composite	Unique artifact identifier
FILE_NAME	VARCHAR2	160		The file name of a by-value artifact included in the asset's metadata.
MIME_TYPE	VARCHAR2	255		MIME type of the artifact
ARTIFACT_CREATED	DATE			Date artifact first created in the Asset metadata
ARTIFACT_LAST_MODIFIED	DATE			Date artifact was last updated in the Asset metadata

RPT_ASSET_CHANGE

Each time an asset is created, updated, deleted or submitted in the asset source, a row is created in this view. In the case of an update, the row will contain an XML description of the change.

Column name	Type	Length	Unique Key	Description
ASSET_ID	VARCHAR2	100	composite	Unique Asset identifier from the asset XML
ASSET_SOURCE_ID	VARCHAR2	100		Unique Asset source identifier (Installation ID:Library ID)
USER_ACCOUNT_NAME	VARCHAR2	100		User account that made this change
ASSET_CHANGE_TYPE	VARCHAR2	60		Type of change
ASSET_CHANGE_NOTES	VARCHAR2	320		Notes entered by system or by user describing the change
ASSET_CHANGE_DELTA	LONG	0		XML representation of Asset change
ASSET_CHANGE_CREATION_DATE	DATE		composite	Date change was made

RPT_ASSET_CLASSIFIER

Classifiers for published assets. Each classifier value for an asset is represented with a separate row in this view. See RPT_CLASSIFIERS for an alternative view of asset classifier information.

Column name	Type	Length	Unique Key	Description
ASSET_URN	VARCHAR2	70	composite	Unique identifier for the asset in this library.
ASSET_CLASSIFIER_NAME	VARCHAR2	255	composite	Asset classifier name

ASSET_CLASSIFIER_STRING_VALUE	VARCHAR2	255	composite	String value, if classifier is string type
ASSET_CLASSIFIER_NUMERIC_VALUE	NUMBER		composite	Numeric value, if classifier is numeric type
ASSET_CLASSIFIER_BOOLEAN_VALUE	CHAR	1	composite	Boolean value, if classifier is boolean type
ASSET_CLASSIFIER_DATE_VALUE	DATE		composite	Date value if classifier is date type
ASSET_CLASSIFIER_CREATION_DATE	DATE			Asset classifier creation date

RPT_ASSET_FORUM

Information on asset-specific forums included in your library. An asset-specific forum is created and maintained for all assets published to your library.

Column name	Type	Length	Unique Key	Description
FORUM_ID	NUMBER		true	Unique forum identifier.
ASSET_URN	VARCHAR2	70		Identifier of asset associated with this forum.
FORUM_DESCRIPTION	VARCHAR2	2000		Description of Forum. This includes the asset name and version.
FORUM_DISPLAY_NAME	VARCHAR2	255		Display name associated with the forum. This includes the asset name and version.

RPT_ASSET_FORUM_MESSAGES

Information on asset-specific forum messages. Each message is associated with a thread within a topic of the Asset's forum.

Column name	Type	Length	Unique Key	Description
FORUM_ID	NUMBER			Unique forum identifier.
TOPIC_ID	NUMBER			Topic identifier
THREAD_ID	NUMBER			Thread identifier
MESSAGE_ID	NUMBER		true	Message identifier
MESSAGE_SUBJECT	VARCHAR2	255		Name describing thread
MESSAGE_BODY	LONG	0		Contents of message

MESSAGE_CREATED	DATE			Message creation date
THREAD_CREATED	DATE			Forum creation date
PARENT_MESSAGE_ID	NUMBER			Identifier of this message's parent message

RPT_ASSET_FORUM_TOPIC

Includes identifier information on asset-specific forum topics.

Column name	Type	Length	Unique Key	Description
FORUM_ID	NUMBER		composite	Unique forum identifier.
FORUM_NAME	VARCHAR2	255		Name of Forum. This is equal to the ASSET_URN for the ASSET of this forum.
FORUM_DESCRIPTION	VARCHAR2	2000		Description of Forum. This includes the asset name and version.
FORUM_CREATED	DATE			Forum creation date
FORUM_DISPLAY_NAME	VARCHAR2	255		Display name associated with the forum. This includes the asset name and version.
TOPIC_ID	NUMBER		composite	Unique identifier of topic
TOPIC_NAME	VARCHAR2	255		Name of Topic
TOPIC_DESCRIPTION	VARCHAR2	2000		Description of Topic
TOPIC_CREATED	DATE			Date Topic created.

RPT_ASSET_FUNCTION

Asset functions as identified in UML model published with asset

Column name	Type	Length	Unique Key	Description
ASSET_FUNCTION_URN	VARCHAR2	70	true	Asset function identifier
ASSET_FUNCTION_NAME	VARCHAR2	160		Asset function name
ASSET_URN	VARCHAR2	70		Asset identifier
ASSET_FUNCTION_SIGNATURE	VARCHAR2	1330		Asset function signature
ASSET_FUNCTION_DESCRIPTION	VARCHAR2	960		Asset function description

ASSET_FUNCTION_ALIASES	VARCHAR2	960		Alternate function names included with asset
ASSET_FUNCTION_CREATION_DATE	DATE			Date asset function was created on asset
ASSET_FUNCTION_MODIFIED_DATE	DATE			Asset function last modified date

RPT_ASSET_PUB_REQ

Asset publish requests for manual publish. Note: This view is the only view to include requests related to manual asset publish. Requests to manually publish an asset are not included in the RPT_ASSET_REQUESTS view.

Column name	Type	Length	Unique Key	Description
USER_URN	VARCHAR2	70	composite	Identifier of user who submitted the asset for publish
ASSET_ID	VARCHAR2	100	composite	Asset identifier from asset XML of asset submitted for publish. Note: ASSET_ID is used here instead of ASSET_URN because the ASSET_URN does not exist until the asset is published for the first time into a library.
ORG_GROUP_URN	VARCHAR2	70		Identifier of group that owns the asset submitted for publish
REQUEST_DESCRIPTION	VARCHAR2	255		Notes entered by the user submitting the asset for publish
REQUEST_CREATION_DATE	DATE			Date request for publish was submitted
REQUEST_MODIFIED_DATE	DATE			Date request was last modified

RPT_ASSET_REGISTRATION

Asset registrations are the result of the request generated by a user requesting the acquisition of an asset for reuse on behalf of a project reaching full approval. When an asset acquisition request is initiated, an entry is made in the RPT_ASSET_REQUEST view (and also in the RPT_ASSET_ACQ_REQ view). Once a request is fully approved (according to the asset acquisition governance configuration for your library), the request is given the status of "Registered" in both of these views and a registration instance is recorded in the RPT_ASSET_REGISTRATION view. If an asset registration is revoked (that is, the request to revoke an asset registration for a project is approved), the registration instance is removed from this view. The revocation request itself is entered in the RPT_ASSET_REQUEST view.

Column name	Type	Length	Unique Key	Description
ASSET_REGISTRATION_ID	NUMBER	22	true	Asset registration identifier (used for internal purposes)
ASSET_REGISTRATION_URN	VARCHAR2	70	true	Asset registration identifier - recommended for use as the registration identifier for

				reporting purposes
ASSET_URN	VARCHAR2	70		Unique identifier of the asset registered to the project
ASSET_ID	VARCHAR2	100		Unique identifier of the asset registered to the project
CONSUMING_ASSET_ID	VARCHAR	400		Unique identifier of the Asset requesting the acquisition of the asset to be consumed.
CONSUMING_RELATIONSHIP	VARCHAR	240		The name of the relationship type used for an asset-based acquisition.
ORG_GROUP_URN	VARCHAR2	70		Unique identifier of the project for which this asset is registered
USER_ACCOUNT_NAME	VARCHAR2	100		Account name of the user who made the original request to acquire the asset for the project
USER_URN	VARCHAR2	70		Unique identifier of the user who made the original request to acquire the asset for the project
ASSET_REG_CREATION_DATE	TIMESTAMP	11		Date asset registered was created for a project (triggered by the final approval action of the acquisition request)
REQUEST_ID	NUMBER	22		Unique identifier of the asset request associated with the registration

RPT_ASSET_RELATIONSHIP

Asset relationships for published assets.

Column name	Type	Length	Unique Key	Description
TARGET_ASSET	VARCHAR2	70	composite	Identifier of asset that is related to the target asset.
SOURCE_ASSET	VARCHAR2	70	composite	Identifier of asset that is the source of the relationship
RELATIONSHIP_NAME	VARCHAR2	60	composite	Name used to describe the relationship between the two assets
REVERSE_RELATIONSHIP_NAME	VARCHAR2	60		Name used to describe the relationship from the point of view of the target asset.
RELATIONSHIP_CREATED	DATE			Date source asset was last published.

RPT_ASSET_REQUEST

RPT_ASSET_REQUEST

Each time a request is made as a result of your library's process governance configuration, it is recorded as a row in this view.

Types of requests include:

- asset submission--governance of asset prior to publish
- asset deletion--governance prior to removal of asset from asset source and library
- asset acquisition--governance of ability to acquire asset for reuse by a project
- asset revocation--governance of removal of registration of an asset for reuse by a project

Your library's use of this view depends on the process configuration in place. A request is created whenever a governed process is triggered. See your Library Administrator for more information.

Column name	Type	Length	Unique Key	Description
ASSET_REQUEST_ID	NUMBER	38	true	Identifier for asset request
PROPERTY_ID	VARCHAR2	43	true	Identifier for asset request, used to join with the RPT_ASSET_REQUEST_PROPERTY view
ASSET_ID	VARCHAR2	100		Identifier of asset associated with the request
ORGGROUP_URN	VARCHAR2	70		Identifier of group used as the context of this request. Please see your Library Administrator for specifics on how your process is configured.
ORG_GROUP_NAME	VARCHAR2	60		Name of group used as the context of this request. Please see your Library Administrator for specifics on how your process is configured.
APPR_STATE	VARCHAR2	100		State of the request. Applicable states are determined by your process configuration.
CATEGORY	VARCHAR2	10		Category of the request. There are two CATEGORY values used by the system: CATALOG (Asset Source) or LIBRARY.
TYPE	VARCHAR2	100		Type of the request. This value equates to the name of the enabled process.
ACTIVE	NUMBER			Indicator as to whether or not this request is still active.
USER_ID	VARCHAR2	100		ID of user making the request.
ASSET_NAME	VARCHAR2	320		Name of asset associated with the request. Note: this is included in this view to record the name of the asset at the time of the request due to the ability to change the name of an asset over time.
ASSET_VERSION	VARCHAR2	40		Version of asset associated with the request. Note: this is included in this view to record the version of the asset at the time of the request due to the ability to change the version of an asset over time.

ASSET_DESC	VARCHAR2	480		Description of asset associated with the request. Note: this is included in this view to record the description of the asset at the time of the request due to the ability to change the description of an asset over time.
CREATED	DATE			Date request was made.
LAST_MODIFIED	DATE			Date of last modification to this request.

RPT_ASSET_REQUEST_ACTION

Information on each action taken related to asset requests created as a result of your library's us of process governance. The purpose of this view is to record a history of these actions. Example actions include *creation, approval, rejection* etc.

Column name	Type	Length	Unique Key	Description
ASSET_REQUEST_ID	NUMBER		true	Identifier for asset request
ACTION	VARCHAR2	100		Designation of action taken.
PARTY_ID	VARCHAR2	100		Identifier of person performing the action. This person may or may not be a library user; therefore the generic "party" designation is used.
PARTY_NAME	VARCHAR2	100		Name of the Party associated with this action.
PARTY_TYPE	VARCHAR2	100		Type of the party associated with this action.
CREATED	DATE			Date when this action was taken.
DELTA	TEXT			XML representation of the difference between property values before and after an action to approve or reject is taken by an approver in a process governance cycle.

RPT_ASSET_REQUEST_APPROVAL

This view records the approvals requested as a result of your library's enablement of a governed process. (See your Library Administrator for more information on the governed processes configured for your library.) In addition, approval records are updated as actions are taken regarding the approval request. For example, asset requests included in this view may be pending approval or may have already been approved.

Column name	Type	Length	Unique Key	Description
ASSET_REQUEST_ID	NUMBER		true	Identifier for asset request
ROLE_NAME	VARCHAR2	100		Name of role associated with approval of request. The value of this field is used to determine the set of users qualified to take action on this request. After action is taken on the approval, the value in this field provides an historic record of the context used when the action was taken.

ROLE_TYPE	VARCHAR2	100		Type of role associated with approval of request. The value of this field is used to determine the set of users qualified to take action on this request. After action is taken on the approval, the value in this field provides an historic record of the context used when the action was taken.
ORGGROUP_URN	VARCHAR2	70		Identifier of group associated with request. The value of this field is used to determine the set of users qualified to take action on this request. After action is taken on the approval, the value in this field provides an historic record of the context used when the action was taken.
ORGGROUP_NAME	VARCHAR2	60		Name of group associated with request
APPROVAL_STATE	VARCHAR2	100		Current state of request approval
PARTY_ID	VARCHAR2	100		Identifier of person associated with approval
PARTY_DISPLAY_NAME	VARCHAR2	100		Display name of party associated with approval
PARTY_TYPE	VARCHAR2	100		Type associated with party associated with approval
CREATED	DATE			Date approval action was taken
LASTMOD	DATE			Date of last modification to this approval request

RPT_ASSET_REQUEST_PROPERTY

This view exposes the properties associated with an asset request for reporting purposes.

Column name	Type	Length	Unique Key	Description
ASSET_REQUEST_ID	VARCHAR	70	composite	Identifier for asset request
PROPERTY_ID	VARCHAR	80	composite	The ID of the property, which is often referred to as the property name
PROPERTY_VALUE	VARCHAR	1000	composite	The value of the property

RPT_ASSET_SOURCE

Information on the asset source(s) established for your installation. There is only one instance of this view for your installation.

Column name	Type	Length	Unique Key	Description
ASSET_SOURCE_ID	VARCHAR2	100	true	Identifier for asset source

ASSET_SOURCE_NAME	VARCHAR2	160		Name associated with the asset source, used for display purposes
ASSET_SOURCE_DESCRIPTION	VARCHAR2	480		Description of the asset source
LIBRARY_ID	VARCHAR2	30		Identifier of library providing the asset source to be shared
ASSET_SOURCE_CREATED	DATE			Date asset source was established for your installation
ASSET_SOURCE_LAST_MODIFIED	DATE			Date this asset source was modified for your installation

RPT_ASSET_SUBSCRIPTION

Information on user asset subscriptions

Column name	Type	Length	Unique Key	Description
ASSET_URN	VARCHAR2	70	composite	URN of subscribed asset
USER_EMAIL	VARCHAR2	100	composite	Subscribed user email address
ASSET_SUB_CREATION_DATE	DATE			Date asset subscription was created

RPT_ASSET_XML

XML content of a published asset

Column name	Type	Length	Unique Key	Description
ASSET_URN	VARCHAR2	70	true	Unique identifier for the asset in this library.
ASSET_ID	VARCHAR2	100		Asset identifier from the asset XML. Unique in this installation.
ASSET_XML	XMLTYPE			XML content of the asset

RPT_AUDITTRAIL

Information on events occurring in a library

Column name	Type	Length	Unique Key	Description
EVENTID	NUMBER		true	Event identifier, unique for each instance of an event
EVENTTYPE	VARCHAR2	80		Unique name describing the type of event

ASSETID	VARCHAR2	100		Identifier of asset associated with an event. Meaning of association may vary, based on event type.
OGNAME	VARCHAR2	60		Identifier of organizational group associated with an event. Meaning of association may vary, based on event type.
USERID	VARCHAR2	100		Identifier of user associated with an event. Meaning of association may vary, based on event type.
SEVERITY	VARCHAR2	80		Each event type has an associated level of severity. The severity level of an event is a configuration point available for event logging.
COMPONENT	VARCHAR2	80		The application component with which the event is associated; for example library component or Asset Source component.
CATEGORY	VARCHAR2	80		Category to which this event belongs. Enables grouping of events by common usage.
CREATED	DATE			Date event occurred

RPT_AUDITTRAIL_COMBINED

Information on events and associated properties occurring in a library

Column name	Type	Length	Unique Key	Description
EVENTID	NUMBER		true	Event identifier, unique for each instance of an event
EVENTTYPE	VARCHAR2	80		Unique name describing the type of event
ASSETID	VARCHAR2	100		Identifier of asset associated with an event. Meaning of association may vary, based on event type.
OGNAME	VARCHAR2	60		Identifier of organizational group associated with an event. Meaning of association may vary, based on event type.
USERID	VARCHAR2	100		Identifier of user associated with an event. Meaning of association may vary, based on event type.
SEVERITY	VARCHAR2	80		Each event type has an associated level of severity. The severity level of an event is a configuration point available for event logging.
COMPONENT	VARCHAR2	80		The application component with which the event is associated; for example library component or Asset Source component.
CATEGORY	VARCHAR2	80		Category to which this event belongs. Enables grouping of events by common usage
CREATED	DATE			Date event occurred
PRNAME	VARCHAR2	255		Name of an additional property associated with an event

PRVALUE	VARCHAR2	2000		Value of the additional event property

RPT_AUDITTRAIL_PROPERTIES

Information on properties associated with library events

Column name	Type	Length	Unique Key	Description
EVENTID	NUMBER		true	Unique event identifier, used to link properties to corresponding event.
PRNAME	VARCHAR2	255		Name of the property associated with the event.
PRVALUE	VARCHAR2	2000		Value of the property associated with the event.

RPT_CAPTURE_TEMPLATE

Information on the asset capture (constraint) templates uploaded to the library for asset capture validation

Column name	Type	Length	Unique Key	Description
TEMPLATE_NAME	VARCHAR2	160	true	Unique name of this template in the library.
TEMPLATE_XML	LONG	0		The template's XML file.
TEMPLATE_UPLOADED	DATE			Date this template was uploaded to the library originally.
TEMPLATE_LAST_MODIFIED	DATE			Date this template was last modified in the library.

RPT_CATALOG_ASSET

All assets in a library's asset source

Column name	Type	Length	Unique Key	Description
ASSET_ID	VARCHAR2	100	true	Asset identifier from the asset XML
ASSET_SOURCE_ID	VARCHAR2	100		If the asset has been published, this is the Identifier of the asset source to which the asset is published.
ORIGINATING_ASSET_SOURCE_ID	VARCHAR2	100		Identifier of the asset source in which the asset was originally created.

ASSET_NAME	VARCHAR2	320		Asset name
ASSET_VERSION	VARCHAR2	40		Asset version
ASSET_DESCRIPTION	VARCHAR2	480		Asset short description
LOCKING_USER_ID	VARCHAR2	100		If the asset is locked, this is the user account name of the user who has it locked.
ASSET_TYPE	VARCHAR2	160		The type associated with the asset. This value is assigned to the asset's asset type classifier.
SUBMITTED_FOR_PUBLISH	CHAR	1		Boolean. Has this asset been submitted for publish?
ASSET_SUBMITTER	VARCHAR2	100		If the asset has been submitted for publish, this is the name of the last user account that submitted it for publish.
ASSET_CREATED	DATE			Date the asset was created in the asset source.
ASSET_LAST_MODIFIED	DATE			Date the asset was last modified the asset source.
ASSET_XML	LONG	0		Asset information in XML format.

RPT_CATALOG_ASSET_XML

XML content of an asset from the asset source

Column name	Type	Length	Unique Key	Description
ASSET_ID	VARCHAR2	100		Asset identifier from the asset XML. Unique in this installation.
ASSET_XML	XMLTYPE			XML content of the catalog asset.

RPT_CATALOG_REL_PROPERTIES

Asset Relationship Properties

Column name	Type	Length	Unique Key	Description
ASSET_ID	VARCHAR2	100		Asset identifier from the asset XML. Unique in this installation.
RELATIONSHIP_NAME	VARCHAR2	400	composite	Name used to describe the relationship between the two assets

RELATED_ASSET_ID	VARCHAR2	640		Asset version
PROPERTY_NAME	VARCHAR2	640		Name of property
PROPERTY_VALUE	VARCHAR2	1000		Value of the property

RPT_CLASSIFIERS

The purpose of this view is to enable easier reporting when asset classifier values are involved. This view has one or more rows for each asset (see below), and includes columns for each of the classifiers included in your global definition template (see below).

All values for the asset's classifiers (where the asset only contains a single value for the classifier) are included in each row for the asset. Classifiers for which the asset has no value are left blank. If an asset has multiple values for a single classifier, duplicate rows are produced for the asset (each including all single classifier values) except that unique values are given in each row for each value of the classifier with multiples. For example, for an asset that has an asset type classifier = "application" and 3 values for a keyword classifier of "A", "B" & "C", the RPT_CLASSIFIERS view would contain three rows for this asset. The first row would contain asset type="application" and a keyword of "A". The second row would contain asset type="application" and a keyword of "B". The third row would contain asset type="application" and a keyword of "C".

Some things to keep in mind when using this view:

- Hint for Querying and Reporting from this view: When searching for an asset containing certain classifier values, use the SQL “Select Distinct” construct to obtain unique assets.
- Performance Note: The nature of this reporting view, unlike the other reporting views, is that this view is build upon "request". In other words, the view is not built unless and until a report that uses this view is run. Consequently, running a report that uses this view is noticeably slower than one using the alternative reporting view for classifiers called RPT_ASSET_CLASSIFIER. If you determine to use this view (due to the greater simplicity it offers for your query construction), you will want to consider creating indices over commonly used columns to improve performance.
- If the classifier names in your Global definition template exceed 30 characters, the name is truncated for the purpose of this view's column name. The system will truncate these classifier names to 28 characters and add sequential numbers from 0-99 in order to ensure unique column names.
- The upload of a new Global Definition Template to your library will affect this view (and the corresponding database table(s)) only if the library's deployment descriptor property for "database_schema_updatable" is set to true. Please see your System Administrator for more information.

Column name	Type	Length	Unique Key	Description
ASSETID	VARCHAR2	100		Unique identifier of asset.
ASSETURN	VARCHAR2	70	none	Unique identifier for the asset in this library. Because an asset may contain multiple values of one or more classifiers, there may be many rows for each asset in this view. Use the SQL "Select Distinct" construct to return information in single row form for an asset.
ASSETNAME	VARCHAR2	320		Asset name
ASSETDESCRIPTION	VARCHAR2	480		Asset short description

ASSET-TYPE	VARCHAR2	2000		The type associated with the asset. This value is assigned to the asset's asset type classifier.
ALIAS	VARCHAR2	2000		An optional alternative name for the asset. Asset alias' are searched along with asset names when the search includes asset name criteria.
The remaining classifiers included depend on your Global Definition template. The view Type & Length for each column is determined based on the type of value to be entered for a classifier as designated in the Global Definition Template.				
Example String Value Classifier	VARCHAR2	255		
Example Long String Value Classifier	VARCHAR2	2000		
Example Numeric Value Classifier	NUMBER			
Example Boolean Value Classifier	CHAR	1		
Example Date Value Classifier	DATE			

RPT_CONTACT

Contact records created for your installation. These consist of users that have accounts in one or more of your Libraries and, in addition, contacts that have been created for Assets. Asset contacts may or may not have user accounts in any of your Libraries. There is only one instance of this view for your installation. All contacts for all the libraries in your installation will be included in this view.

Note: the contents of this view will vary, depending on the configuration for contact/user attributes. This view will be expanded to include any custom user attributes you have defined for your installation. These custom attributes may be from your LDAP records and/or from your library configuration. Please see your System Administrator for more information on the custom attribute definition for your installation.

Column name	Type	Length	Unique Key	Description
CONTACT_ID	VARCHAR2	80	true	This is a unique contact id generated for each contact.
CONTACT_SOURCE_ID	VARCHAR2	20		Contact identifier
CONTACT_CREATED_DATE	DATE			Date contact was created
CONTACT_LAST_MODIFIED	DATE			Date contact was last modified
FULL_NAME	VARCHAR2	2000		Full name of contact: including first name and last name.

ACCOUNT_NAME	VARCHAR2	2000		Library User Account name
EMAIL	VARCHAR2	2000		Contact Email address
Additional custom fields ...	VARCHAR2	2000		Each custom field is determined by a configuration command executed by your System Administrator. Each custom field is of the same type and size, as they are all persisted as values in a common column.

RPT_DRM

Reference model information

Column name	Type	Length	Unique Key	Description
DRM_URN	VARCHAR2	0	true	Reference model identifier
DRM_NAME	VARCHAR2	80		Reference model name
DRM_DESCRIPTION	VARCHAR2	255		Reference model description
DRM_PAGE_URL	VARCHAR2	255		Process start page
ASSET_ID	VARCHAR2	100		Asset identifier of reference model asset
DRM_CREATION_DATE	DATE			Reference model published date
DRM_MODIFIED_DATE	DATE			Reference model last published date

RPT_FUNCTION_MAPPING_INFO

Information about the relationships mapped between asset functions and reference model functions. Records are added to this view each time a mapping is added to an asset.

Column name	Type	Length	Unique Key	Description
ASSET_URN	VARCHAR2	70		Unique identifier for the mapped asset
ASSET_FUNCTION_URN	VARCHAR2	70	composite	Unique identifier for the mapped asset function
IC_FUNCTION_URN	VARCHAR2	70	composite	Unique identifier for the reference model function the asset is mapped to
FUNCTION_MAP_AFFINITY_RATING	NUMBER			Affinity rating of the relationship
FUNCTION_MAP_PARTIAL_LOGIC	CHAR	1		Boolean. Does the asset function contain partial functionality as compared to the reference model

				function?
FUNCTION_MAP_ADDITIONAL_LOGIC	CHAR	1		Boolean. Does the asset function contain additional functionality as compared to the reference model function?
FUNCTION_MAP_NOTES	VARCHAR2	480		Function mapping information notes
FUNCTION_MAP_CREATION_DATE	DATE			Function mapping creation date
FUNCTION_MAP_MODIFIED_DATE	DATE			Function mapping last modified date

RPT_GENERAL_FORUM

Information on the general forum of your library. A general forum is created and maintained for your library. Topics and thread within the general forum are not meant to be asset-specific.

Column name	Type	Length	Unique Key	Description
FORUM_ID	NUMBER		true	Unique forum identifier.
FORUM_NAME	VARCHAR2	255		Name of Forum
FORUM_DESCRIPTION	VARCHAR2	2000		Description of forum
FORUM_CREATED	DATE			Forum creation date
FORUM_DISPLAY_NAME	VARCHAR2	255		Display name associated with forum

RPT_GENERAL_FORUM_MESSAGES

Information on messages created in the general discussion forum

Column name	Type	Length	Unique Key	Description
FORUM_ID	NUMBER		composite	Forum identifier
TOPIC_ID	NUMBER			Topic identifier
THREAD_ID	NUMBER			Thread identifier; used to associate all related messages
MESSAGE_ID	NUMBER		composite	Message identifier
MESSAGE_SUBJECT	VARCHAR2	255		Subject associated with a message
MESSAGE_BODY	LONG	0		Text contents of a message
MESSAGE_CREATED	DATE			Date message was created, in millisecond format.

THREAD_CREATED	DATE			Date topic was created, in millisecond format.
PARENT_MESSAGE_ID	NUMBER			Identifier of parent message associated with a reply

RPT_GENERAL_FORUM_TOPIC

Information on the general discussion forum topics

Column name	Type	Length	Unique Key	Description
FORUM_ID	NUMBER		composite	Forum identifier
FORUM_NAME	VARCHAR2	255		Name of Forum
FORUM_DESCRIPTION	VARCHAR2	2000		Description of forum
FORUM_CREATED	DATE			Forum creation date
FORUM_DISPLAY_NAME	VARCHAR2	255		Display name associated with forum
TOPIC_ID	NUMBER		composite	Topic identifier
TOPIC_NAME	VARCHAR2	255		Name of Topic
TOPIC_DESCRIPTION	VARCHAR2	2000		Description of Topic
TOPIC_CREATED	DATE			Date Topic created
TOPIC_MODIFIED	DATE			Date Topic last modified

RPT_GLOBAL_DEF_TEMPLATE

Information on the global definition template for your library.

Column name	Type	Length	Unique Key	Description
TEMPLATE_XML	LONG	0		The contents of the Global Definition Template's XML
TEMPLATE_UPLOADED	DATE		true	Date template was last uploaded

RPT_IC

Idealized components identified in reference models

Column name	Type	Length	Unique Key	Description

IC_NAME	VARCHAR2	80	composite	Idealized component name
IC_DESCRIPTION	VARCHAR2	960		Idealized component description
DRM_URN	VARCHAR2	0	composite	Reference model identifier of the reference model that includes this idealized component.
IC_CREATION_DATE	DATE			Idealized component creation date. This is equal to the date the reference model is published.

RPT_IC_FUNCTION

Reference model idealized component functions

Column name	Type	Length	Unique Key	Description
IC_FUNCTION_URN	VARCHAR2	70	true	Idealized component function identifier
IC_FUNCTION_NAME	VARCHAR2	80		Idealized component function name
IC_FUNCTION_DESCRIPTION	VARCHAR2	960		Idealized component function description
IC_FUNCTION_PAGE_URL	VARCHAR2	255		URL to the page for the idealized component function in published reference model
IC_FUNCTION_SIGNATURE	VARCHAR2	255		Idealized component function signature
IC_NAME	VARCHAR2	80		Idealized component name
IC_INTERFACE_NAME	VARCHAR2	80		Idealized component interface name
DRM_URN	VARCHAR2	70		Reference model identifier of the reference model that includes this IC Function.
IC_FUNCTION_CREATION_DATE	DATE			Idealized component function creation date. This is equal to the date the reference model is published.

RPT_IC_INTERFACE

Reference model idealized component interfaces

Column name	Type	Length	Unique Key	Description
IC_INTERFACE_NAME	VARCHAR2	80	composite	Idealized component interface name
DRM_URN	VARCHAR2	70	composite	Reference model identifier of the reference model that includes this IC Interface

IC_NAME	VARCHAR2	80	composite	Idealized component name
IC_INTERFACE_DESCRIPTION	VARCHAR2	960		Idealized component interface description
IC_INTERFACE_CREATION_DATE	DATE			Idealized component interface creation date. This is equal to the date the reference model is published.

RPT_LIBRARY

Library information. Includes a row for each library in your installation.

Column name	Type	Length	Unique Key	Description
LIBRARY_NAME	VARCHAR2	60	true	Library name
LIBRARY_DESCRIPTION	VARCHAR2	255		Library description

RPT_ORG_GROUP

Organizational groups

Column name	Type	Length	Unique Key	Description
ORG_GROUP_URN	VARCHAR2	70	true	Unique group identifier
ORG_GROUP_NAME	VARCHAR2	60		Group name
ORG_GROUP_DESCRIPTION	VARCHAR2	255		Group description
ORG_GROUP_MANAGER	VARCHAR2	70		Org group manager. This field is used to store the name of a manager. It is used only if the group is not a project. This field is not used by your application other than to provide this name for display or reporting purposes. This field is not related to project manager.
ORG_GROUP_IS_PROJECT	CHAR	1		Boolean. Designates whether or not this group is a project.
PROFILE_URN	VARCHAR2	70		URN of profile directly associated with this org group (if any)
PARENT_ORG_GROUP_URN	ORG_GROUP_URN	70		URN of org group that is directly superordinate to this org group; that is, the group designated as its parent
ORG_GROUP_CREATION_DATE	DATE			Org group creation date

ORG_GROUP_MODIFIED_DATE	DATE			Org group last modified date

RPT_ORG_GROUP_HIERARCHY

This view includes a row for each instance of a group that is superordinate to another group. Each group may have one or more groups "above it" in the group hierarchy and this view will include a row for each of these. An exception to this is the row for the Enterprise Org Group; although a row is included for the Enterprise Org Group in this view, this is the only group that does not have a parent.

The purpose of this view is to enable you to create a query to find all ancestors for a particular group, including the group's parent and all other groups in the inheritance chain up to and including the enterprise group. This view is useful, for example, when designing a report to include asset acquisition requests consolidated across more than one project.

Column name	Type	Length	Unique Key	Description
ORG_GROUP_URN	VARCHAR2	70	composite	Unique identifier for the group in this library.
ANCESTOR_ORG_GROUP_URN	VARCHAR2	70	composite	The identifier for one group that is superordinate to the group identified.

RPT_ORG_GROUP_USER_ROLE

For each group, information is included on users and their role assignments for a group.

Column name	Type	Length	Unique Key	Description
ORG_GROUP_URN	VARCHAR2	70	composite	Unique identifier for a group
USER_URN	VARCHAR2	70	composite	Identifier of user assigned a role for this group
ROLE_NAME	VARCHAR2	60	composite	Name of the role assigned

RPT_PROJECT

This view includes all groups that are designated to be projects.

Column name	Type	Length	Unique Key	Description
ORG_GROUP_URN	VARCHAR2	70	true	Unique identifier of a project.
PROJECT_ACTIVE	CHAR	1		Designation of whether or not the project is Active

RPT_PROJECT_PARTICIPANT

Users assigned to projects

Column name	Type	Length	Unique Key	Description

ORG_GROUP_URN	VARCHAR2	70	composite	Unique identifier of a project.
USER_URN	VARCHAR2	70	composite	Unique identifier of a user assigned to participate on a project

RPT_PROPERTY

Properties are utilized in your library configuration. This view exposes the properties attached to various business objects in your application, such as users, projects, assets, requests and so on. See your Library Administrator for more information.

Column name	Type	Length	Unique Key	Description
PROPERTY_OWNER_ID	VARCHAR2	70	composite	Unique identifier of the object owning the property
PROPERTY_ID	VARCHAR2	80	composite	Unique identifier of the property
PROPERTY_VALUE	VARCHAR2	1000		Value of the property
IS_CUSTOM_PROPERTY	NUMBER	22		Boolean. Designates whether or not this property is a custom property (0) or is a standard property (1) provided by your application.

RPT_QUERY_SUBSCRIPTION

Information on users' search alerts. A record is added to this view each time a user adds an alert to an asset query or a model based search.

Column name	Type	Length	Unique Key	Description
QUERY_URN	VARCHAR	70	composite	Unique identifier of a search on which a user has set an alert.
USER_URN	VARCHAR	70	composite	Unique identifier of the user associated with the search alert.

RPT_REQUEST_XML

XML content of requests

Column name	Type	Length	Unique Key	Description
ASSET_REQUEST_ID	NUMBER	38	true	Identifier for asset request
ASSET_REQUEST_XML	XMLTYPE			XML content of requests

RPT_SEARCH_SPECIFICATION

Information on a search specification created for a project.

Column name	Type	Length	Unique Key	Description
SEARCH_NAME	VARCHAR2	80	composite	Search name, unique within each project.
SEARCH_DESCRIPTION	VARCHAR2	480		Description of the search (optional).
SEARCH_CREATOR_URN	VARCHAR2	70		Unique identifier of the user that created the search.
PROJECT_URN	VARCHAR2	70	composite	Unique identifier of the project associated with the search
SEARCH_TYPE	VARCHAR2	160		Identifies the type of search. For example, a search may be an Asset Query (TAQ) or a Model Based Search (TCS). Note: The acronyms used to designate the type of search are based on naming used for our original implementation. They no longer represent meaningful search type names themselves, but can be used to differentiate between Asset Query and Model Based Searches.
RM_URN	VARCHAR2	70		Unique identifier of a reference model that is associated with a Model Based Search. This field is only used with a Model Based Search.
SEARCH_STATUS	VARCHAR2	192		The status (if any) that has been assigned to the search.
SEARCH_LAST_RUN	DATE			Date this search was last run to produce results.
RESULT_CURRENCY	CHAR	1		Boolean representing whether or not the search has been run since the last update to its criteria.
SEARCH_CREATED	DATE			Date the search was first created.
SEARCH_MODIFIED	DATE			Date the search was last modified.

RPT_TAG

Information on tags. This view is not used at this time.

Column name	Type	Length	Unique Key	Description
ASSET_ID	VARCHAR2	100		
TAG_Name				
USER_ID	VARCHAR2	100		
Created	Date			

RPT_USER

This view includes information for user accounts in your library.

Note: this view will be expanded to include any custom user attributes defined for your installation. These custom attributes may be from your LDAP records and/or from your library configuration. Please see your System Administrator for more information on the custom attribute definition for your installation.

Note: When changes are made to records in your LDAP system, the data in this view will be out of sync with the LDAP information until your System Administrator runs the SynchronizeContacts commands to refresh the data.

Column name	Type	Length	Unique Key	Description
USER_URN	VARCHAR2	70	true	User URN
USER_NAME	VARCHAR2	100		Account name used to login
USER_ACTIVE	CHAR	1		User active flag (Boolean)
USER_CREATION_DATE	DATE			Date user account was created
USER_MODIFIED_DATE	DATE			Date user account was last modified
ORG_GROUP_URN	VARCHAR2	70		URN of user's reporting org group
CONTACT_ID	NUMBER			Identifier of Contact record for this user
CONTACT_SOURCE_ID	VARCHAR2	20		Source of the contact record
CONTACT_CREATED_DATE	DATE			Date contact was created for a library user account or for an Asset's contact information when published to the library.
CONTACT_LAST_MODIFIED	DATE			Date the contact information was last modified.
FULL_NAME	VARCHAR2	2000		Full name of user
ACCOUNT_NAME	VARCHAR2	100		Library account name of user
EMAIL	VARCHAR2	2000		User email address
Additional custom fields ...	VARCHAR2	2000		Each custom field is determined by a configuration command executed by your System Administrator. Each custom field is of the same type and size, as they are all persisted as values in a common column.

Application Report Access

As a library user, regardless of your role assignments, you can create report entries, which are references to report URLs on your report server. You can then associate each report entry with your own workspace. This will give you access to the reports referenced by the entry in your web browser application Reports list. Your ability to create report entries that are shared with others depends on the library role(s) you have been assigned.

Report entries are managed by clicking on the **[Manage Reports]** link available at the top of your Reports list page. Click on this link to display the Manage Reports page, enabling you to create new Report Entries or modify existing entries.

- You can create access to reports for your own use.
- If you are assigned a Usage Controller role, you can also create report entries and associate them with an organizational group for which you hold the Usage Controller role. This will cause this report entry to be included in the Report list for all users who report to this organizational group, as well as your own.
- If you are a Project Manager, you can also associate a report entry with any of the projects you manage. This will cause this report entry to be included in the Report list for all other users who are assigned to this project, as well as your own.

Reports List

This page displays a list of reports currently available to you. You can display this page by clicking on the **[Manage Reports]** link in Reports section of your Home page, then clicking on the Reports breadcrumb. Each row contains information about an available report.

The reports included in this list include those associated with your reporting group and the projects you are assigned, in addition to those you may have added to your own workspace.

From this page you can:

- View the list of available reports. Note: Your list of reports may include standard reports. If your Reports list does not include standard reports, ask your System Administrator for more information. For more information on standard reports please see the section on Standard Reports in the Default Library Configuration.
- Click on a report name link display the report or to run it and display fresh results (depending on the configuration of your report server).
- Click on the Manage Reports link to display the Manage Reports page.

Reports list page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

[Manage Reports]

Click on this link to display the Manage Reports page, which enables you to create a new report entry, edit an existing report entry, or remove an existing report entry.

Report Name

This is the name of the report. Click on this name link to display the report or run it display its results in a new browser window.

Description

This is a text description of the report.

View/Edit Report Access Detail

This page enables you to edit an existing report entry. You can display this page by clicking on an **[Edit]** link on your Manage Reports page.

Edit Report page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Reports

Click on this bread crumb link to display your Reports list page

Manage

Click on this bread crumb link to display your Manage Reports page.

[Remove this report]

Click on this link to remove this report entry from the system.

Name:

Modify the name you wish to use to identify access to your report as necessary. This is the name of the report entry and may or may not correspond to the actual name of the report to which it is linked.

Description:

Modify the description for the report entry as necessary. This description will be shown with the report entry on your Home page and Reports list page.

URL

Modify the URL to be accessed for the display or running of this report as necessary. Depending on your reporting configuration, a library user may execute the report by selecting it from the report list or may simply display the results of a report run.

Report is in:

The group, project or workspace name that follows this heading identifies which of these the report entry was created for. Members of the group named will see this report in their reports list. Click on the **[Change]** link to change the group association of this report entry.

Buttons

When you are finished viewing and/or modifying Editing Report page, you can choose one of the following:

Save

Click on this button after you have entered information for this report entry. The Manage Reports page will be displayed as a result, which should include your newly created report entry.

Cancel

Click on this button to abort the creation of a report entry.

Create New Report Access

This page enables you to create a report entry in your web browser application for a report accessible from your report server. Creating a report entry results in adding a link to the report on your Report list page. You can display this page by clicking on an **[Add Report]** link in the appropriate section of your Manage Reports page. The link you select is determined by whether you want to share this report entry with others in your reporting group or project. Note: depending on your User Account role assignments, you may not have the ability to share your report entry with others.

Adding Access to a new Report Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Reports

Click on this bread crumb link to display your Reports list page

Manage

Click on this bread crumb link to display your Manage Reports page.

Name:

Enter the name you wish to use to identify access to your report. This is the name of the report entry and may or may not correspond to the actual name of the report to which it is linked.

Description:

Enter a description for the report entry. This description will be shown with the report entry on your Home page and Reports list page.

URL

Enter the URL needed to display or run this report. Depending on your reporting configuration, a library user may execute the report by selecting it from the report list or may simply display the results of a report run.

Report is in:

The group, project or workspace name that follows this heading identifies which of these the report entry was created for. Members of the group named will see this report in their reports list. Click on the **[Change]** link to change the group association of this report entry.

Buttons

When you are finished viewing and/or modifying Adding a new Report, you can choose one of the following:

Save

Click on this button after you have entered information for this report entry. The Manage Reports page will be displayed as a result, which should include your newly created report entry.

Cancel

Click on this button to abort the creation of a report entry.

Provide Group Report Access

This page displays a list of possible associations for a report entry. You can display this page by clicking the **[Change]** link in the **Report is in:** section of the Editing a Report and Adding a New Report pages.

From this page you can:

- View a list of group(s) for which you are a member.
- View a list of project(s) for which you are responsible.
- Click on My Workspace, a group name link, or a project name link to modify the group or workspace associated with this report entry.

Associating Report page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Reports

Click on this bread crumb link to display your Reports list page.

Manage

Click on this bread crumb link to display your Manage Reports page.

Edit

Click on this bread crumb link to return to your Adding a new Report or Editing a Report page.

[Keep Current Association]

Click on this link to return to your Adding a new Report or Editing a Report page.

Workspace

This is your workspace. Click on this link to associate this report entry with your workspace.
Note: Reports associated with your workspace can only be viewed by you.

Groups

This section contains a list of the group(s) of which you are a member. Click on a Group name link to associate the report entry with a new group in your library.

Projects

This section contains a list of the project(s) for which you are responsible. Click on a project name link to associate the report entry with this project.

Manage Report Access

This page enables you to display information about, and create or change the reports accessible from the web browser application. You can display this page by clicking on the **[Manage Reports]** link in your Reports list page.

From this page you can:

- View the list of reports.
- Click on an **[Add Report]** link to create a new report entry for your workspace, a project you manage, or a reporting group.
- Click on an **[Edit]** link to edit one of your existing report entries.
- Click on a **[Delete]** link to remove one of your existing report entries.

Report Management page Content

This page contains the following selections and information:

Home

Click on this bread crumb link to display your home page.

Reports

Click on this bread crumb link to display your Reports list page.

[Done]

Click on this link to return to your Reports list page.

The remainder of this page consists of information on existing report entries and links to add new report entries. This information is grouped into sections by Groups and Workspace, depending on the user role(s) you are assigned.

Group Reports

This section is displayed if you have the role of Usage Controller. Non-project groups within the scope of your active administration group are listed along with their existing report entries (if any) and an **[Add Report]** link. Click on this link to add a new entry to the corresponding group. Report entries that you create in this section result in the group members having the new report accessible from their Report list page.

Project Reports

This section is displayed if you have been assigned Project Manager for one or more projects (other than your private workspace). All projects you manage are listed along with their existing report entries (if any) and an **[Add Report]** link. Click on this link to add a new entry to the corresponding project. Report entries that you create in this section result in the project members having the new report accessible from their Report list page.

Workspace Reports

This section is always included on your Manage Reports page. All of your existing report entries are listed along with an **[Add Report]** link. Click on this link to add a new entry to your workspace. Report entries that you create in this section result in a new report included on your Reports list page.

Report Parameters and Report URLs
About Report Parameters

Report designs often include parameters that are used at the time of report execution. These parameters are often called "run-time" parameters. When run-time parameters are used in a report, default values for the parameters may be included to support the general running of the report. Optionally, parameter values can then be entered as you run the report to override the default values. As an alternative to providing default values, you can specify parameter values on the report URL itself or use a context parameter provided by your application. For examples of the use of report parameters, please refer to the standard reports provided with this application.

About Report URLs

Reports can be executed from the Reports section of your Home page. To establish this capability for a new report you wish to access, you must provide the necessary URL. See creating report access for more information.

For example, to examine the URL used to run a standard report from your web browser application, open the associated report entry:

1. Navigate to the report section of your home page.
2. Select **[Manage Reports]** from the resulting reports list page. This results in a list of existing report entries.
3. Click **[Edit]** to open a report entry to view or change the URL being used to run the report.

Report URL Options

Here are some optional capabilities you can build into a URL for report execution:

- **To provide values for the run-time parameters of a report -** Add report parameter values to the URL
- **To add your database_schema_name to the URL -** append **&database_schema_name=yourschemaname** to the report URL
- **To filter report content by context** - use a context parameter provided by your application (see below)

Application-Provided Context Parameters

Context parameters can be used in your report URL to filter report content. For example, by using a context parameter for "current user" in a report URL, the content of the report will be constrained to those items related to the user who is executing the report from the application. There are a set of context parameters provided by your application and therefore available for use in reporting. The context parameters are documented in the Library Configuration Guide, which is available from the Akana™ support site or your Library Administrator.

The corresponding web browser application contexts used are:

- Library ID
- Current User
- Active Project
- Group associated with the report in the application's report entry

Library Concepts

About the Library

Your library provides a repository to store Software Development Assets (assets). Your application provides the means for system development personnel to interact with the library to easily find, identify, qualify and disqualify various assets for use on a potential development project. It facilitates discovery of the technical aspects of how an asset works and how it relates to other assets. Without the library, the process to identify and qualify a candidate asset for potential use with a project is often inefficient.

Features of Working with your Library

Your application takes advantage of one or more of the following library features to support your library use:

- Assets are created and maintained through your library's asset source.
- Assets that are ready to be made available to asset users are published to the library.
- An "in-progress" version of each asset remains in the asset source for both published and unpublished assets, enabling asset editing.
- Published assets are available to asset users and can be discovered through various means, including:
    - Asset Tree
    - Search Box Searches
    - Asset Queries
    - Model Based Searches
    - Alerts
- User collaboration about assets is supported through asset specific forums
- Asset subscription enables you to be notified of asset changes or activity
- Metrics are provided by your application for these library constructs:
    - assets
    - groups that own assets
    - projects that consume assets

Applications that interact with your library

There are a number of applications you can use to interact with your library. These include, but are not limited to:

- web browser applications supporting asset consumption, asset production, governance and administration
- rich client applications supporting asset consumption and asset production, such as:
    - Akana™ Plug-in for Eclipse
    - Akana Plug-in for IBM® Rational® Application Developer for WebSphere® Software
    - Akana Plug-in for IBM Rational Software Architect
    - Akana Add-in for Microsoft® Visual Studio .Net
    - Akana Repository Client

- rich client applications supporting integration with various third party tools, such as:
  - Akana Rational ClearCase® Importer
  - ClearCase Custom Artifact Source
  - Akana Add-in for Visual Source Safe
- SOAP Application Programming Interfaces
- Automation Extensions
- AnySource Asset Adapter
- AnySource Artifact Adapter

About Configuring your Library's Core Processes

Library Core Processes

There are four processes considered as core to library functionality. Your application provides the option for each core process to be extended in order to incorporate processing and governance specific to your requirements.

- Asset Acquisition - the process by which an asset is requested for registration to a project and optionally an acquiring asset. This process is triggered by the action of a project participant clicking on the acquire link or icon of the asset to be acquired.
- Asset Registration Revocation - a process that enables the removal of the registration of an asset to another asset or a project. This process is triggered by the action of a project participant opening the context of an asset acquisition and clicking on the Update link or icon.
- Asset Submission for Publish - the process which, if necessary approvals are received, results in the publish of an asset to the library. This process is triggered by the action of an Asset Capture Engineer clicking on the Submit link or icon for an asset in progress.
- Asset Deletion - the process which, if necessary approvals are received, results in the removal of an asset in progress and also the corresponding published asset (if the asset was published). This process is triggered by the action of an Asset Capture Engineer clicking on the Delete link or icon for an asset in progress.

Library Process Configuration

For each core process, you have the option to provide specific configuration to designate processing that will take place when triggered by a library user. Through configuration, you can specify custom processing for any or all of these three phases. You can also specify filters for each process and to alternatives provided in the process in order to designate which assets and which users will be involved.

Process phases include:

1. Pre-governance - processing that occur upon initial trigger action, prior to any governance approval process that is in place.
2. Governance - an approval cycle corresponding to the request to acquire, revoke, publish or delete. Governance involves the creation of a request pending approval by a user with a specified role. Action is taken by one or more approvers to approve or reject the request according to specification. Email notices are sent to potential approvers as well as to the original submitter of the request. Information in the form of request properties is provided to and/or gathered from participants in the approval cycle.
3. Post-governance - processing that occurs upon the conclusion of the governance approval process, if any that is in place.

For more information on implementing library process configuration, please refer to the application help system provided with the Configuration Designer plugin or Repository Client application. Directions for accessing the Configuration Designer plugin or Repository Client are provided in the Download pages of the web browser application.

Effects of Process Configuration

In general, your library's process configuration will specify which user roles receive notifications and pending requests when a triggering action is taken. Filtering provided in the configuration designates conditions that must be met in order for a triggering action to result in specific processing. Other effects of process configuration are specific to the configuration itself. See your Library Administration for more information on the process configuration in place for your library processes.

Library Federation

Your application offers the capability of sharing a single asset's published information with users in multiple libraries. Library federation is based on the ability to publish assets from one asset source into one or more libraries at once. For example, once an asset is fully approved for publish (according to the applicable asset submission governance process) it is published to the library associated with the originating asset source. In addition, if library federation has been established, the asset may also be published to one or more additional libraries according to criteria established for each receiving library. By publishing sets of assets to multiple libraries, you can use library federation to share these assets with applicable user groups.

Asset Sources

Each library has an associated asset source which contains assets created by and available to its Asset Capture Engineers for editing. Asset Capture Engineers are assigned to groups within a library can view and work with the assets in progress owned by their group in the library's asset source. Asset Capture Engineers use the asset in progress form of an asset to maintain the asset's metadata. Information created or modified in the asset in progress available to users outside of the Asset Capture Engineers responsible for the asset metadata until the asset is published to the library.

Using Assets Originating from Another Library's Asset Source

Your library may contain assets that have been published from the asset sources of other libraries in addition to the assets that have been published from its own asset source. Assets that are sourced from asset sources external to your library can be searched, explored, discussed, consumed and acquired in the same manner as assets native to your library. The only indication that an asset is owned by an external asset source is provided on the asset's detail information page where the name of the asset's owning asset source is provided.

Using Reference Models Originating from Another Library's Asset Source

In a manner similar to assets provided from an external asset source, reference models may also be published into multiple libraries as well. Reference models that are sourced from an external asset source can be used to navigate and search for library assets in the same manner as a reference model originating from your library's asset source. For example, external reference models that incorporate asset searches based on asset classifier values (c-searches) will return assets that meet c-search criteria whether the assets are sources internally or externally.

Establishing Library Federation

Library federation is established through the creation of "visible" and/or "remote" asset source entries for the "receiving" library. For example, your System Administrator can create a visible asset source entry for your library for the purpose of bringing in assets from another library's asset source. Visible asset source entries are applicable when the asset sources you want to draw from is associated with another library on your same installation. Remote asset source entries apply when you want to bring in assets from asset sources associated with libraries on a separate installation. By creating a set of visible and/or remote asset source entries in various libraries can provide a configuration of federated libraries to meet the requirements of users and asset owners in each library. By using classification criteria sets to establish stereotypes for each asset source entry, the sharing of assets can be filtered to include only those assets that meet designated criteria. See your System Administrator for more information on visible and remote asset source entries.

Reference Model Creation and Publish

Reference models are created and made available to your library through reference model creation and publish. See your Support Center for information on obtaining the Reference Model Tool Kit, which facilitates the creation and publish of reference models.

In addition, reference models may be published to your library from a visible asset source. See Assets from other Asset Sources.

Reference models (once they are published to your library) must be associated with projects to make them available to project participants.

- A reference model published to your library is "owned" by a group and is included in that group's assets in progress (similar to other types of assets). By default, the published Reference Model is associated with its owning group. No explicit action on the part of a Usage Controller is necessary to achieve this association. All participants on projects equal to or subordinate to the group owning the model will have the model available to their project's searches.
- If you are a Usage Controller, you can also directly associate a published reference model with other groups or projects by editing the corresponding section of the group detail page.
    - Note: Reference Models that are made available to your library from a Visible Asset Source or Remote Asset Source require this step as well. Once the other asset source is made visible to your library, as Usage Controller you must take the step to associate the reference models included to the group(s) in your library that will use them. There is no automatic association created for a Reference Model published from an external asset source.
    - Associating a Reference Model with your Enterprise group will enable the participants of all projects to view and use the model.

About Publishing to a UDDI Registry

When an asset is published to your library, it can also be published to one or more designated UDDI Registries in order to provide programmatic access. This action is triggered by the establishment of one or more UDDI Publishers for your library.

When a UDDI Publisher is established for your library, all assets that are published or republished to the library are also published/republished to the UDDI repository. Qualifications are that the asset type and other asset classifier values matches the criteria given in the associated classification criteria set (if a set is associated with your publisher). Assets that do not meet the criteria established by a classification criteria set associated with your UDDI Publisher will not be included in a publish to the registry. For more information on UDDI Publishers specific to your library, please see your System Administrator.

Application Support for Asset Publish to UDDI

Please contact support@akana.com for more information on the capability and configuration of asset publish to various UDDI implementations.

Reference

What's New

Your Akana® solution provides a rich set of features and applications to enable your company to effectively manage your important resources and processes. To see what's new, visit the Akana Document Repository. Click on the Lifecycle Manager product link to find the latest What's New document, featuring details of the newest features and upgrades.

You can also find this document by logging on to the Akana support site using your Software Support credentials, then clicking on the Downloads link. Navigate to the link corresponding to the product and version you are working with. Then click on Documentation. You will find the *What's New* document here, in addition to other documents useful to developers and system administrators.

Download Center

The Download Center page offers access to a number of downloads provided with your Akana® solution. These downloads include:

- a variety of client applications that enable you to interact with your library for asset consumption and asset production in a fashion similar to your web browser application.
- a variety of client applications that provide specialized functionality, such as Reference Model Toolkit, Configuration Designer, Groups Visualization, etc.
- tools that support automated interaction with your library, such as Automation Extensions, AnySource Asset Adapter, etc.

The Download Center is available to all library users. You can display the Download Center page by clicking on this item from your top navigation bar.

Note: in some cases the process provided to you for obtaining various clients and other tools may use a source other than the download center. For instance, your administrators may provide you with an installation to your workstation. In other cases, there is an update center provided by an IDE you will use to obtain the download. See your System Administrator for assistance.

Glossary

ACE - See Asset Capture Engineer.

Acquisition - The authorization and registration of the use of an asset for a project in your library. Depending on your library configuration, the acquisition of an asset, once fully approved, may result in a reuse metric being incremented and may enable project users to access asset artifacts that were restricted from view prior to acquisition. See Asset Acquisition Mode for information about the ways asset acquisition can be configured.

Action - Actions combine triggering Events and Filters with Listeners, and optionally define result Events to be raised when the listener execution is complete.

Active Administration Group - The Group that is used to scope the visibility of assets and other items for Usage Controllers. A Usage Controller selects the Active Administration Group by clicking on the [Change] link in the Administration section of the thin client application.

Active Asset - The current active asset that will be used to consume another asset.

Active Group (Administration) - See Active Administration Group.

Active Group (Production) - See Active Production Group.

Active Production Group - Used to provide a default owning group for new assets you create. You have the option to override this default when creating or editing an asset. An Asset Capture Engineer selects the Active Production Group by clicking on the [Change] link in the Production section of the thin client application.

Active Project - The active workspace within a library for which active assets are chosen for acquisition.

Activities - Activities correspond to customizable action links or buttons that are presented to the user at certain points in the application. An example would be the acquire link used when an Asset Capture Engineer wants to acquire an asset.

Add-in - The Add-in is a component used with Microsoft Visual Studio that allows the user to use, edit and view Assets from the library. The Add-in is a separately downloadable feature, available on your Akana web browser application's Downloads page. Also see Plug-in.

Admin Console - See System Admin Console.

AnySource - The overall architecture which allows for the creation of asset source adapters. The AnySource architecture uses a combination of web service and Java-based automation extensions. It supports the automatic load of information about assets from any source which may hold pertinent asset data or artifacts.

Application Programming Interface (API) - An interface specification which provides a way for software components to communicate with each other.

Artifact - A type of asset metadata. Artifacts provide information included with an asset to provide documentation, code or references. Artifact types included with an asset will vary with the type of asset. Examples include: use cases, design models, analysis models, source code, test cases, frequently asked questions, asset reviews, and other items. Artifacts may be stored in the library or referenced by your asset.

Artifact Comparator - Artifact Comparators are classes that contain custom artifact comparison logic which is used when displaying differences between two versions of an artifact. An Artifact Comparator must be able to determine if differences exist between artifact versions, and if so, produce those differences in a document that can be presented to the user. Artifact Comparators are configured and selected based on the file extension of target artifacts. Artifact Comparators are defined within the "artifact-comparators" element in the global section of the Library Configuration document.

Artifact Source - Artifact Sources are used to retrieve artifacts from external systems that do not support URI-based access for artifacts. Artifact Sources are classes that contain custom artifact retrieval logic which is used when a user requests an Artifact from an Asset. The responsibilities of an Artifact Source are quite simple: given reference information for a particular artifact, the Artifact Source instance must return a stream that represents the contents of the requested artifact. The actual method used to retrieve the artifact is left to each Artifact Source class. Artifact Sources are defined within the "artifact-sources" element in the global section of the Library Configuration document.

Artifact Transform - Artifact Transforms are responsible for performing transformations on the contents of an artifact before it is presented to a user. Artifact Transforms are classes that contain custom logic which is run when an Artifact is shows to the user. Artifact Transforms are defined within the "artifact-transforms" element in the global section of the Library Configuration document.

Assessment - Akana Professional Services can provide services to assess a customer's development process, strategic business and technical architectures, and existing software development assets for the purpose of recommending an implementation targeted to actively managing and leveraging software assets and governing processes within the Akana Service Lifecycle.

Asset - An asset represents something of value for your software development organization. There are various types of assets, depending on the configuration of your library. For example, assets types can include components, services, modules, design patterns, architectures and other software engineering development materials. Your Akana solution views an asset as being more than a physical executable component. For example, an asset can include artifacts in addition to a set of classifiers and relationships.

Asset Acquisition - This process is invoked when a user request acquisition of a published asset.

Asset Acquisition Mode - Your library configuration determines how assets can be acquired. There are two modes that determine how assets can be acquired:

- Asset Based Acquisition - acquired assets are associated directly with the acquiring asset
- Project Based Asset Acquisition - acquired assets are registered with the acquiring project

Your Library Administrator configures the acquisition mode using the Update Library Configuration page of the Akana thin client application.

Asset Based Acquisition (ABA) - With asset-based acquisition, an asset is acquired not only for the use of a project, it is also acquired for use by a specific consuming asset within a project. For example, an asset (typically representing code-based development, such as a service asset or an application asset) can acquire an existing asset. Asset-based acquisition provides an additional level of detail for the acquisition by creating a relationship between the acquiring and the acquired asset, in addition to the registration of the acquired asset to the consuming project. As with project-based acquisition, the project used for the context of an asset-based acquisition is the project that is active when the project participant makes the request to acquire an asset. The asset used as context for the asset-based acquisition (in other words, the acquiring asset) by default is the asset that is active when the request is made, although a different asset may be selected from the dialog accompanying asset-based acquisition. Asset acquisition mode is configured by your Library Administrator.

Asset Capture - The process of documenting an asset in your library. This includes designating its metadata (identifiers, artifacts, classifiers, and relationships) and saving the completed documentation into the asset source. Capturing an asset creates an Asset In Progress.

Asset Capture Engineer (ACE) - A role assigned to users who will document assets, save them to their asset source and submit them for publish when they are complete. Asset Capture Engineers maintain asset content and can also request the deletion of an asset when necessary. See your web browser application's on-line help for more information about roles.

Asset Capture Template - A constraint template that is associated with an asset as it is created or updated in the asset source. Each Asset Capture Template defines specific metadata elements available to be included with a particular type of asset. Furthermore, the asset capture template may provide additional validation by specifying rules of cardinality, value lists used in data entry, help information for each element, etc. Capture Templates can be edited by your Library Administrator, using the Capture Template Editor.

Asset Catalog - See Asset Source and Asset in Progress.

Asset Deletion - This is the point in the catalog at which the user clicks on the "delete" link on the Asset Edit page, or deletes the asset through the rich client.

Asset Description - Text that describes the purpose of an asset. The asset description will appear in various places in the application, such as in result lists, where its purpose is to briefly describe the asset.

Asset Filter - Asset Filters are similar in structure and purpose to Classification Criteria Sets, but are defined using the Library Configuration Editor "Filters" tab.

Asset Forum- A library feature that facilitates discussion of topics related to a specific asset. All published assets have an associated asset forum.

Asset Identifier (Asset ID) - A value that uniquely identifies an asset within the library.

Asset In Progress - A term used to describe an asset in a library's asset source. Users with the role of Asset Capture Engineer can create an asset in progress in the asset source and submit it for publish. Asset Capture Engineers can also edit an asset in progress and submit it for republish in order to update the asset in the library.

Asset Owner - Depending on the groups you have been assigned as Asset Owner, you may have responsibility to take action on acquisition requests (or other types of requests) for assets acquired by group projects or assets owned by the group and its subordinate groups. For example, your library configuration may designate that as an asset owner assigned to Group A, you will receive acquisition requests submitted by project users for the "Service" assets owned by Group A and any groups subordinate to Group A.

Asset Publisher - See publisher.

Asset Property - Asset Properties are custom values associated with an asset in order to supplement asset metadata and/or support workflow. See properties for more information.

Asset Query - A search to find assets visible to a library project that match the Asset Query Specification.

Asset Query Specification - A specification that documents the criteria used to find assets in a library. An Asset Query Search specification can include one or more search strings as well as classifier values. Asset Query Specifications may be persisted and used at a later time.

Asset Revocation - This process is invoked when a user requests the revocation of an asset acquisition.

Asset Schema - The definition of the information (as well as constraints on that information) which will be held in the library for an asset. There may be more than one asset schema resulting in different data being held for different types of assets and depending on their lifecycle status. Each asset has one schema associated with it at any given time.

Asset Search - The activity performed to find assets that conform to search criteria. There are many ways to conduct and asset search, such as from the asset tree, search box, asset query or model based search.

Asset Source - A component of your Akana solution that provides a staging area repository for the creation of assets and the update of their data. Each library has one associated asset source. Library users who are assigned the role of Asset Capture Engineer have the ability to create and maintain assets in progress in a library's asset source.

Asset Source Adapter - A module which connects an asset source to the open interfaces of a library such that assets residing in that source can be automatically captured and published into a library. For example, you can have an adapter to a source code control system to update assets whenever the source is changed.

Asset Specification - The definition of the structure of an asset. The asset specification is an XML document describing the asset and its artifacts, classifiers and relationships. Specification contents (i.e., the asset schema) are defined for a library using a template-based approach.

Asset Submission - This is the point in the catalog at which a user submits an Asset for publishing.

Asset Tree - A way to view, sort, find and organize published assets when using the Akana thin client application. The Asset Tree is located in the left navigation pane.

Asset User - A user of the system whose primary role is to conduct searches and research assets found in the asset library. The Asset User may also request the use of an asset (acquisition) for their project. See your web browser application on-line help for more information on roles and acquiring an asset for a project.

Asset Validator - Asset Validators are classes that contain custom Asset validation logic to be executed synchronously during the Asset edit process. They are defined within the "asset-validators" element in the global section of the Library Configuration document.

Asset View - A library construct that provides a means to scope the visibility of assets for project users. An asset view consists of a set of asset references. Asset views are created by a Usage Controller and associated with one or more groups or projects in the library group hierarchy. See your web browser application on-line help for more information on asset views.

Attached Asset - Refers to an asset that has been attached to a project or to a search specification. Assets attached to a project are those that have been requested for use by a project participant. Assets attached to a project may include assets registered to the project and other assets that are pending approval for registration. Assets attached to a search specification are made explicitly by a participant of the search specification for the purpose of providing a reference to the asset that is persisted with the search specification.

Automation Extensions - A set of programmable interfaces for capturing and publishing assets. Automation Extensions are available from your web browser application Download Center pages.

BIRT (Business Intelligence and Reporting Tools) - The Business Intelligence and Reporting Tools (BIRT) Project is an open source software project that provides reporting and business intelligence capabilities for rich client and web applications, especially those based on Java and Java EE. Your Akana application uses BIRT for report creation.

Capture - See Asset Capture.

Capture Template - See Asset Capture Template.

Capture Template Editor - A specially-designed editor which is used to configure your Capture Templates. The editor allows you to graphically edit the classifier, relationship, and artifact types used for the asset types in your library. The Capture Template Editor is installed when you select the Akana Template feature from the Repository Client or Eclipse Update site for your library.

Catalog - See Asset Source.

Classification Criteria Set - A set of asset search criteria that is shared across the enterprise.

Classifier - A type of asset metadata. Classifiers provide a way to both describe and categorize assets. Classifiers consist of name/value pairs and can contain text, decimal, date, or boolean values. Classifiers are also used to support searches for assets by classification. Classifier types included with an asset may vary with the type of asset.

Configuration Designer - An Eclipse-based plugin tool used to work with many aspects of your library's configuration, such as asset definition, process configuration, role definition, property definition, filter definition, and role-based asset display and editing. Configuration Designer facilitates the editing of the library configuration documents as well as their upload to the library after modification.

Consumption - The Consumption section of the left navigation bar of the Akana thin client application offers information and links related to Active Projects and, if the library is configured to support asset-based acquisition, to Active Asset. It also includes a facility for conducting searches for assets and other items. The Consumption section is displayed for all users, regardless of role assignment.

Context Filter - Used by the Library Configuration Editor to determine what an activity applies to. Filters define the criteria used to determine if a process or alternative applies to a specific request. Filters can also be used to determine whether an activity is enabled. For example:

- May define a set of Filters for the asset submission process based on the lifecycle status of the asset. This would allow you to vary submission processing based on the lifecycle status of the asset by applying different Filters to the submission processes in your configuration or to each of the alternatives within one submission process.
- May define a Filter based on a set of asset types to apply to the acquisition activity in order to disable the acquisition process for specific asset types that are not meant to be acquired.

C-Search - A type of reference model hot link that triggers a search based on classification criteria.

Custom Group Role - A role that is defined by your Library Administrator, in addition to the standard roles that are already supported.

Enterprise - A company using the Akana solution. An enterprise may consist of one or more corporate entities.

Event - An Event represents the occurrence of a state change within the Akana application.

Event-Driven Process - A process triggered by Events, Listeners, Roles, and Filters that have been defined via an XML source (Library Configuration Document). When an event is triggered and a filter is met, a specific listener is executed. Optionally, an event may be signaled. Variations can:

- specify one or multiple triggers
- specify if one trigger or multiple triggers must occur to cause action
- designate a delay time
- specify result codes indicating success or failure to be used for error handling

Exporter - A class that allows a user to take action on one or more assets returned from an asset search. Exporters are defined within the "exporters" element in the Library Configuration Document. A commonly-used exporter is the "Delimited File Exporter" which exports asset information into a zip file.

Federated System - A remote system that libraries will communicate with.

Filter - A Filter encapsulates criteria to be applied to an Event or set of Events.

Forum - A library feature that facilitates discussion of general or asset-specific topics. A forum provides the ability to create *topics* in order to categorize forum discussion. Each *topic* can have one or more "initial" *posts*, each of which begins a discussion *thread*. To participate in a discussion forum, a user can create *topics,* begin a discussion thread by *posting* to a *topic*, and *reply* to existing *posts* or *replies*. In some cases, users may be notified of forum activity on *posts* or *replies* they create in the general forum or of *thread* activity on forum topics in the forum for an asset they are subscribed to. See General Forum, Asset Forum and subscription for more information.

GDT Editor - A specially-designed editor which is used to configure your Global Definition Templete (GDT). The editor allows you to graphically edit the classifier, relationship, and artifact types used for the asset types in your library. The GDT Editor is installed when you select the Akana Template feature from the Repository Client or Eclipse Update site for your library.

General Forum- A library feature that facilitates discussion between library users related to non-asset-specific topics.

Global Definition Template (GDT) - An XML configuration document which defines the superset of all classifier, relationship, and artifact types used for the asset types in your library. The GDT can be edited by your Library Administrator, using the GDT Editor.

Governance - Refers to the process of controlling the use and lifecycle of assets. The approval process illustrates the concept of governance, where asset requests that meet the criteria of the context filter (if any) are forwarded to designated user roles for approval or rejection of the request. The Governance section of the left navigation bar of the Akana thin client application offers access to request you have originated and also to requests pending your action, if you are assigned a governance role.

Group - A representation of a portion of an enterprise's organization with respect to IT development projects and various responsibilities related to reuse and process governance work. A hierarchical structure of groups is established for your library to support asset ownership, role assignments and associations with profiles, asset views, reference models, etc.

Group Owner - The group that owns an asset. Users can be assigned various roles for the group (or a parent of the group) to cover the responsibilities of asset ownership, such as Asset Capture Engineer, Asset Owner, custom roles, etc. See your web browser application online help for more information on asset ownership and roles.

Importer - A class that allows an interactive import of assets from a specified location or system of record, such as a runtime registry. Importers are defined within the "importers" element in the Library Configuration Document. They appear in the "Import Assets" page in the Akana thin client application. Importers may optionally define input fields to be presented to the user.

Installation Administrator - The system administrator for your installation. An installation administrator creates library instances and provides configuration at the installation scope, along with various other technical responsibilities. See the Installation Administration Guide available from the System Admin

Console for more information. You can access your System Admin Console from a link on the top navigation bar of your web browser application if you have the System Administrator role.

LDAP - See Lightweight Directory Access Protocol (LDAP).

Library - A repository for a collection of software development assets which provides facility to search, retrieve, consume and collaborate as well as the means to govern various related processes.Each library is associated with an asset source.

Library Administrator - A role assigned to users who will administer a library. Library Administrators can manage the Global Definition Template, along with other aspects of the library. See your web browser application on-line help for more information on roles.

Library Configuration document (LPC) - The Library Configuration document is an XML document that contains definitions for the library of the four core processes (Submission, Deletion, Acquisition, and Revocation), as well as a number of other aspects of library configuration such as those related to activities, roles, properties, filters, role-based asset views and asset editing, etc. The Library Configuration editor allows the user to graphically edit process configuration and also facilitates the definition of the other aspects of library configuration.

Library Configuration Editor - A specially-designed editor which is used to configure your Library Configuration document (LPC). The editor allows you to graphically edit process configuration, and facilitates the definition of the other various aspects of library configuration. The Library Configuration Editor is included with the Repository Client, and is installed when you select the Configuration Designer feature from Eclipse.

Lifecycle Status - An asset classifier that describes the status of an asset as it moves through various stages, for example Design Complete or Production.

Lightweight Directory Access Protocol (LDAP) - An application protocol for accessing and maintaining distributed directory information services over an Internet Protocol network. Directory services may provide any organized set of records, often with a hierarchical structure, such as a corporate electronic mail directory. Similarly, a telephone directory is a list of subscribers with an address and a phone number. *

Listener - A Listener is associated with a class or service that encapsulates custom behavior to be invoked upon the occurrence of an Event. Your Akana application supports two different types of listeners:

- **Internal Listener** - Internal listeners are provided with your Akana application. They include classes to perform tasks like UDDI publishing, XML validation, and others. For detailed information about internal listeners, see the Library Configuration Guide, available from the Akana support site's Downloads link.
- **External Listener** - External listeners are web services that implement the application's ExternalListener service interface definition.

LPC - See Library Configuration Document (LPC).

Metadata - Information about the asset. Your library supports four major categories of asset metadata: identifiers, classifiers, artifacts, and relationships.

Metadata Group - Used to support the configuration of role-based asset information viewing and/or editing. Metadata Groups include classifiers, artifacts and/or relationships. Metadata Groups are associated with Metadata Views, which are in turn used to designate the metadata views available to roles for display or edit purposes.

Metadata View - Used to support the configuration of role-based asset information viewing and/or editing. Metadata Views are composed of one or more Metadata Groups. Metadata views are used to designate the metadata available to user roles for display or edit of asset information.

Metrics - Numerical measures of some aspect of interest with regard to an asset, artifact, or process. Reuse metrics provide quantifiable insight as to the effectiveness of an asset reuse program.

My Requests - When using the Akana thin client application, the My Requests link on the left navigation bar provides access to a list of requests you've originated that are currently pending approval. For example, when you attempt to acquire an asset for use on your project, your library may be configured for asset acquisition governance. If so, and if one or more approvals are required for your project to use this asset, you will see your request listed in your My Requests list until the request has been fully approved or rejected.

New Version of an Asset - Creating a new version of an asset in the library means that an Asset Capture Engineer (ACE) selects the **Create New Version** link available on a published asset. The result is a deep copy of the asset data being created as an asset in progress in the asset source. The Asset Capture Engineer is given the opportunity to modify the asset name, version and other asset data as necessary.

Organizational Group - A representation of an enterprise's internal organization with respect to development projects and reporting groups. A tree structure of organizational groups may be established by an enterprise, with an organizational group representing the entire enterprise serving as the root of this tree structure. Within this tree structure, the Usage Controller is free to establish any hierarchical structure that is useful (e.g., divisions, departments, project teams).

Pending Requests - When using the Akana thin client application, the Pending Requests link on the left navigation bar provides access to a list of requests that are currently pending your approval. The Pending Requests item will not be used unless you are assigned a governance role. For example, when an Asset Capture Engineer submits an asset for publish and the process configuration associated with the asset requires your approval for the publish of the asset, you will see a pending request item in your Pending Requests list.

Plug-in - The Plug-in is a component that can be added to Eclipse that will allow the user to access, edit and use Assets from the library. The Plug-in is a separately downloadable feature, available on your Akana web browser application's Downloads page. Also see Add-in.

Post-processing - Processing that occurs once a process is triggered, but prior to approval governance.

Pre-processing - Processing that occurs once an asset request is approved.

Predecessor - A type of relationship that can be added to an asset. A predecessor relationship is given to an asset that is an earlier version of the asset you are working on.

Prerequisite - A type of relationship that can be added to an asset. A prerequisite relationship is given to an asset that is required to be in place prior to the implementation of an asset.

Process - Refers to one of the four core processes of submission, deletion, acquisition and revocation.

Process Model - The representation of the processes within the domain of a reference model. A process model may be included in a reference model. Process models may consist of graphics and/or text and are used to provide navigation to assets referenced by the model.

Production - When using the Akana thin client application, the Production link on the left navigation bar offers information and links related to your Active Production Group, and a set of links corresponding to the production of assets. The Production section is displayed only if you are assigned the role of Asset Capture Engineer.

Profile - A library construct that consists of a set of characteristics applicable to one or more groups in your library. A profile simplifies using standard characteristics across multiple organizational groups, such as asset tree organization and reference model availability. Profiles are created by a Usage Controller and are associated with groups.

Project - A shared workspace within a library for which asset searches can be conducted, search specifications can be created and against which asset usage can be registered. A project is "owned" by an organizational group.

Project Based Asset Acquisition - With project-based asset acquisition, assets are acquired for a library project, which has been established to serve as context for tracking the asset reuse generated by a specific development effort. When an acquisition is triggered, the project used for its context is the project that is active at the time. Asset acquisition mode is configured by your Library Administrator.

Project Manager - An Asset User who has been designated by a project as its manager. A project manager can be involved in approving acquisition requests made by project participants. They may also have the responsibility of adding and removing project participants as well as assigning role assignments scoped to the project.

Properties - Properties provide a mechanism to allow custom data to be associated with business objects, such as groups, users, requests and assets. They are currently exposed through the UI for two of these: requests and assets. Properties are currently added to business objects through the library configuration. Property values are maintained through automation.

Property Filter - Contains criteria that are applied to an entity's properties to determine whether or not the filter is met. The type of entity is included in the filter definition.

Property Group - Used to support the association of properties to specific tasks or processes and (optionally) roles. Property Groups consist of a set of properties. Property Groups are associated with Property Views, which can in turn be used to designate the asset properties viewed by roles when viewing or editing asset information.

Property View - Used to support the configuration of role-based property viewing (asset and request properties) and/or editing (in the case of Request Properties only). Property views consist of one or more property groups.

Publish - A term used to describe the process of copying the full metadata of an asset, applying publish information as designated by the associated publish template and placing the asset in the library. Publishing an asset makes the asset available to Asset Users. Prior to publish, an asset remains in the Asset Source and is available only to Asset Capture Engineers. Once an asset is published, Asset Capture Engineers can update the "asset in progress" in the Asset Source. Changes to the asset then become available to library users when the asset is republished.

Published Asset - See Publish.

Publisher - A role assigned to users who will have the responsibility to upload publish templates and maintain asset publish information. Publishers may also be involved in manually publishing assets, although this is more commonly handled by publish templates. See your web browser application on-line help for more information on roles.

RAS - See Reusable Asset Specification (RAS).

Reference Model - The graphical or textual representation of a specific knowledge domain used for the purpose of performing searches for referenced assets. Reference models can represent any type of domain, such as technical or Business. For example, Reference Models can be used to represent Application Architectures, Technical Architectures, Business Process Models, etc.

Registration - The granting of authorization to a project to use a particular asset. The final step of the asset acquisition process. Asset registration increments asset reuse metrics for the project, asset and asset owning group.

Relationship - A type of asset metadata . Artifacts consist of information that describes the relationship between two assets. The type of relationship is specified, as well as the assets involved in the relationship. Relationship types included with an asset may vary with the type of asset. Examples include: Prerequisite, Predecessor, and others.

Report Entry - A record created in the library to provide access to a report. A report entry includes the name of a report and the URL by which it can be accessed.

Request - A business object used to support and manage the workflow associated with one of the four workflows managed by your application: asset submission for publish, asset deletion, asset acquisition or asset acquisition revocation. When a workflow-managed event occurs, a request is created. Information can be added to the request in the form of properties and comments by the submitter and all approvers involved in the workflow.

Request Properties - Custom values associated with a request to provide and gather information related to the request throughout its workflow. See properties for more information.

Reusable Asset Specification (RAS) - An specification, using XML, that defines common attributes which make up an asset specifications. RAS is an industry standard defined by a consortium of software tool providers, middleware providers, component providers and brokers, led by Rational Software, Inc.

Rich Client - Refers to the Repository Client installed on the local machine, the Eclipse Plug-in, or the Microsoft Visual Studio Add-in.

Role - An assigned part assumed by a user when interacting with the library system. A library user may have one or more roles. See your web browser application on-line help for more information on roles.

Role Filter - Contains criteria that are applied to a user's assigned roles to determine whether or not the filter is met.

Schema - An outline or model that defines the structure of objects like web services or databases. The Akana Global Definition Template is a schema.

SCM - See Source Control Management (SCM).

Scripted Listener - Scripts that are stored in Document Repository which access standard Java extension APIs, and are invoked by the Script Listener class. BeanShell and Jython Scripts are supported.

Search Specification - A persistent query that describes a set of search criteria, and, optionally, a set of attached assets.

Secure Sockets Layer (SSL) - Cryptographic protocols that provide communication security over the Internet. *

Severity - Used to distinguish between Events representing messages, warnings, or errors.

Single Sign-On (SSO) - Single Sign-on is a login mechanism that allows authorization by an external web server plug-in. This enables you to integrate with your own "single sign on" solution. *

SOAP - SOAP is an XML-based protocol that enables Web Services and the software components using them to communicate, even when the client and server may be running under different operating system platforms, or using different programming languages. As long as each entity supports the SOAP protocol, information can be exchanged. A typical use of SOAP is for use with HTTP-style request-response mechanism. SOAP can also be used with other transport layers, for example Simple Mail Transfer Protocol (SMTP).

Software Development Asset (SDA) - See Asset.

Source Control Management (SCM) - A system that manages documents, source code, or other types of data within a software project.

SSL - See Secure Sockets Layer (SSL).

SSO - See Single Sign-On (SSO).

Submission - The process of moving an asset through a process, for example submitting the asset for publish, or submitting an asset acquisition request.

Submitter - The user who submits a request.

Subscription - The status of being subscribed to a published asset. When you are subscribed to an asset, you will receive email notification each time the asset is republished, a new version of the asset is created.

System Administrator - Has the Super User role for the library and has ultimate control over all aspects of the library.

System Admin Console - The System Admin Console provides access to features that can only be accessed by a System Administrator. If you have the System Administrator role, you can access the System Admin Console by using the "Administration" link located in the upper right corner of the web browser application.

Task - Defines the processing to occur within a process. Tasks for the library are defined in the Library Configuration Document (LPC) by your Library Administrator.

Thick Client - See Rich Client.

Thin Client - The Akana web browser application.

Timer - Timers allow the triggering of a specified Event repeatedly at a specified interval. Timers are useful for triggering "batch" style processes that may run hourly, nightly, etc.

UDDI - See Universal Description, Discovery and Integration (UDDI).

UML - See Unified Modeling Language.

Unified Modeling Language (UML) - A standard modeling language that is used to graphically represent the artifacts associated with all aspects of object-oriented software engineering ranging from requirements through deployment.

Uniform Resource Identifier (URI) - A string of characters used to identify a name or a resource. Such identification enables interaction with representations of the resource over a network (typically the World Wide Web) using specific protocols. Schemas specifying a concrete syntax and associated protocols define each URI. *

Uniform Resource Name (URN) - A uniform resource identifier (URI) that uses the urn scheme and does not imply availability of the identified resource. Both URNs (names) and URLs (locators) are URIs, and a particular URI may be a name and a locator at the same time.

Universal Description, Discovery and Integration (UDDI) - A platform-independent, Extensible Markup Language (XML)-based registry by which businesses worldwide can list themselves on the Internet, and a mechanism to register and locate web service applications. UDDI is an open industry initiative, sponsored by the Organization for the Advancement of Structured Information Standards (OASIS), for enabling businesses to publish service listings and discover each other, and to define how the services or software applications interact over the Internet. *

Usage Controller - A role assigned to users who will have the responsibility to establish and manage the library's group structure, user accounts, asset capture templates, classification criteria sets, etc. See your web browser application on-line help for more information on roles.

Use Case - A list of steps used to describe and model the functions and interactions used to achieve a specific goal or process within the domain. A use case may be standalone, or it may include subsidiary use cases that fulfill parts of the use case's responsibilities. Use cases are often modeled using UML.

User - A person whom interacts with the library. Each user has a unique user ID and password assigned by the Usage Controller. Each user is assigned one or more roles, which determines the capabilities of their interface to the library.

UTF-8 - UTF-8 (UCS Transformation Format—8-bit) is a variable-width encoding that can represent every character in the Unicode character set. It was designed for backward compatibility with ASCII, and to avoid the complications of endianness and byte order marks inherent in UTF-16 and UTF-32. *

Validation - Validation is used for tasks that perform validation of asset metadata. The Validate listener defines aspects of the specific listener used to perform the validation.

Value Source - A Value Source is a class which is responsible for producing a list of valid values for a property or asset classifier. Value Sources are defined within the "value-sources" element in the global section of the Library Configuration document, and assigned for use in the Global Definition Template (GDT) or an Asset Capture Template.

View - Views provide a mechanism for identifying sets of asset metadata or properties for your library configuration. Each View includes one or more Groups, which in turn are comprised of metadata or properties. Views are assigned to Roles in order to designate which asset metadata will be viewable and/or editable by a user, and which properties will be viewable with assets and asset requests. Configuration Designer provides the ability to create views on the Views tab of the Library Configuration editor.

Web Service - A Web Service is a function that programs can access over the web, typically using http protocol.

WSDL - The Web Services Description Language is an XML-based language that is used for describing the functionality offered by a Web service. A WSDL description of a web service (also referred to as a WSDL file) provides a machine-readable description of how the service can be called, what parameters it expects, and what data structures it returns. It thus serves a roughly similar purpose as a method signature in a programming language. *

XML - Extensible Markup Language. A language that supports definition of industry-specific structured documents and data. XML documents are composed of markup, which encodes a description of the document's storage layout and logical structure (i.e., the semantics of the document), and character data (i.e., the contents of the document).

* Definition provided by Wikipedia