



# BEA AquaLogic® Enterprise Repository

## User Guide

Version 3.0 RP1  
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## Getting Started

### Logging Into ALER

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

**Note:** If your organization requires a user name and password each time you log into ALER, make sure that the **Enable Automatic Login** box is unchecked.

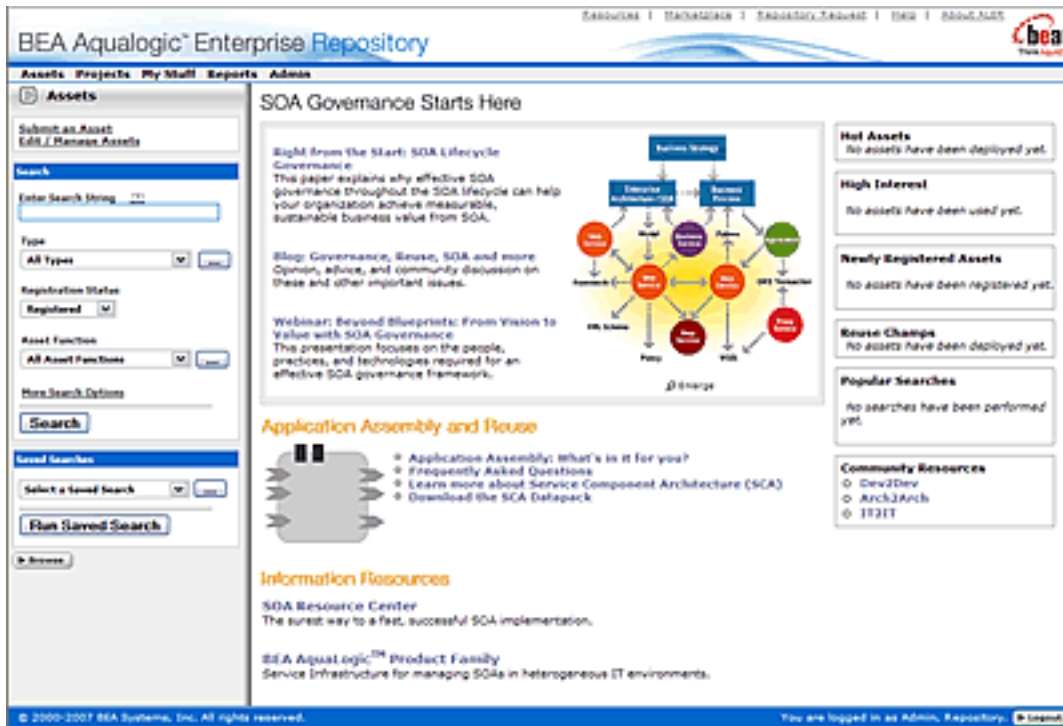
3. Click **Login**.

The **Login Stats** dialog box displays a welcome message that includes the date and time of your login.

4. In the **Login Stats** dialog box, click **Close**.

### The Default View

The ALER home page is displayed upon logging in. This page can be customized by the system administrator to display resources, assets, and news relevant to your company.



Each page in ALER is divided into a sidebar and a main pane. The main pane can be expanded by dragging the left border of the pane to the left.

## The ALER Menu Bar

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

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

- **Assets**
  - Click to use, submit, edit, and manage assets, as determined by the access settings for your assigned role.
- **Projects**
  - Visible and accessible only to users in the appropriate role.
  - Click to create, manage, and search for projects, and to assign users to projects.
- **My Stuff**
  - Click to view information about assets you have produced or consumed, projects to which you are assigned, or assets to which you have subscribed.
- **Reports**
  - Click to view a number of standard reports based on asset usage, value, and compliance.

- **Admin**
  - Visible and accessible only to users in the appropriate role.
  - Enables system configuration after installation, and is used to create users, assign roles, configure access settings, configure system and email settings, and monitor system use.
- **Resources**
  - Optional and customizable
  - Enabled and disabled on **Admin** page
  - Configurable to direct users to additional information.
- **Marketplace**
  - Optional and customizable
  - Enabled and disabled on **Admin** page
  - Configurable to link to an internal or external site where assets can be acquired.
- **Repository Request**
  - Click to submit requests to the designated registrar, such as a request for an asset that is unavailable in the registry.
- **Help**
  - Provides general information on using ALER.

The lower portion of the main page can be customized to highlight your company's news and policies. This page includes embedded features that display information about new additions to the registry, the most frequently used assets, and a list of users who have achieved the highest levels of asset reuse. As an alternative, your company can substitute its own home page. Think of this page as a configurable portal that allows your organization to promote initiatives to all ALER users.

## Logging Out of ALER

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

To log out:

1. Click **logout**.

A confirmation message appears.

2. Exit the browser, or click **Log back in**.

## User Roles

### User Role Descriptions

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

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

- **User**

- Anyone with a ALER user name and password is considered to be a user. This role can be assigned as the default role for any new users at the time the user is created. All ALER users can:
  - View news about the company's reuse initiatives
  - Locate, evaluate, and use and download assets
  - View projects
  - Generate reports
  - Submit assets to the registrar

- **Access Administrator**

- The access administrator creates all ALER users and assigns permissions to them. The access administrator must be familiar with the functions of the Admin page. Typically, access administrators can:
  - Create, view, and edit users and permissions
  - Generate reports

- **Advanced Submitter**

- The advanced submitter role is typically assigned to *asset builders* and *harvesters*.
  - *Asset Builders* focus on building the asset content base. They respond to organization-wide asset needs as well as individual project needs.
  - *Harvesters* study post-implementation projects for asset reuse potential.
- Typically, advanced submitters can:
  - Locate, evaluate, and use and download assets
  - View projects that are associated with assets
  - Generate reports
  - Submit assets to the registrar
  - Edit asset metadata prior to asset registration

- **Registrar**

- The registrar is the single point of acceptance or rejection for any asset. There may be more than one person functioning as a repository registrar, depending on the functions addressed. Typically, registrars can:
  - Locate, evaluate, and use/download assets

- View projects that are associated with assets
- Generate reports
- Submit assets to the registrar
- Edit asset metadata prior to asset registration
- Accept assets for the registration process
- Approve tabs
- Register assets
- Apply access settings

- **Registrar Administrator**

- The registrar administrator is able to use the Type Manager to create and edit assets, compliance templates, and policy types within ALER. Typically, registrar administrators can:
  - Locate, evaluate, and use/download assets
  - View projects that are associated with assets
  - Generate reports
  - Submit assets to the registrar
  - Edit asset metadata prior to asset registration
  - Accept assets for the registration process
  - Approve tabs
  - Register assets
  - Apply access settings
  - Edit artifact stores

- **Project Administrator**

- ALER tracks asset use at the project level in order to maintain a history for maintenance purposes. Project administrators create projects and assign users to projects using the Projects page, visible only to users with appropriate permissions. Project administrators can also close projects, indicate which assets were deployed, and review, validate, and optionally override the predicted, consumer-reported value of assets used in a project through the project-reported asset value user interface. Typically, project administrators can:
  - Create, edit, and view projects
  - Generate reports

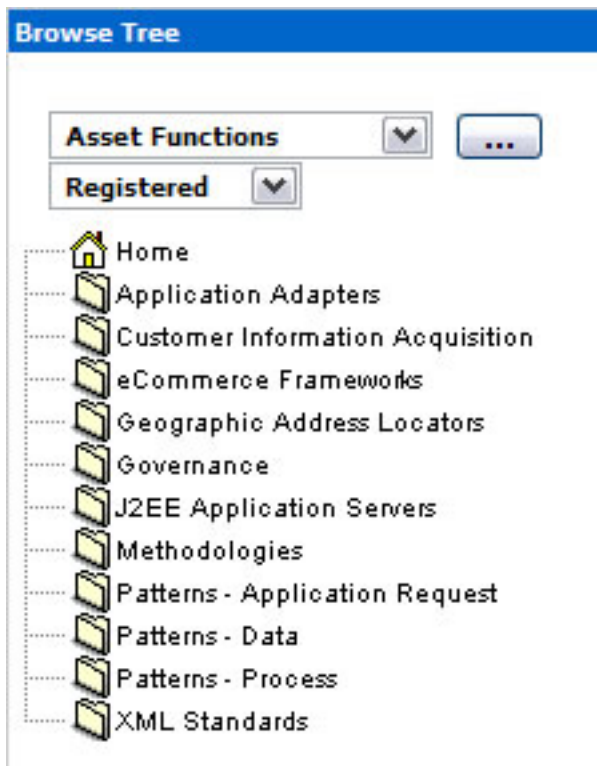
- **System Administrator**

- The system administrator configures ALER for use, including, possibly, installation as well as the post-installation configurations. The system administrator typically can:
  - Enable and edit system settings
  - Generate reports

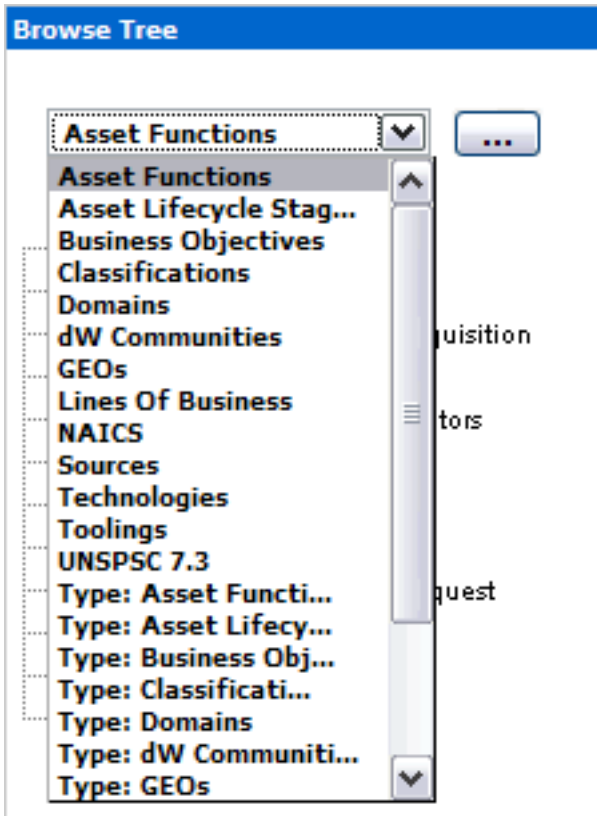
## Navigating the Asset Tree

This procedure is performed on the ALER Assets page.

1. Click **Browse** button in the **Assets** sidebar to open the **Browse Tree**.

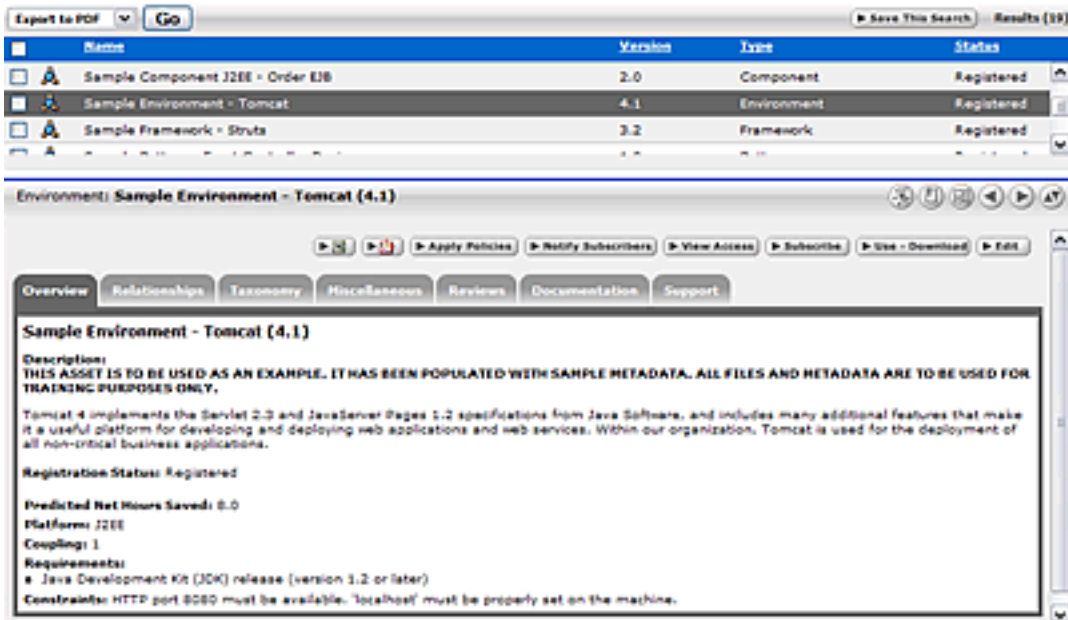


2. Use the drop-down to filter the results.



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

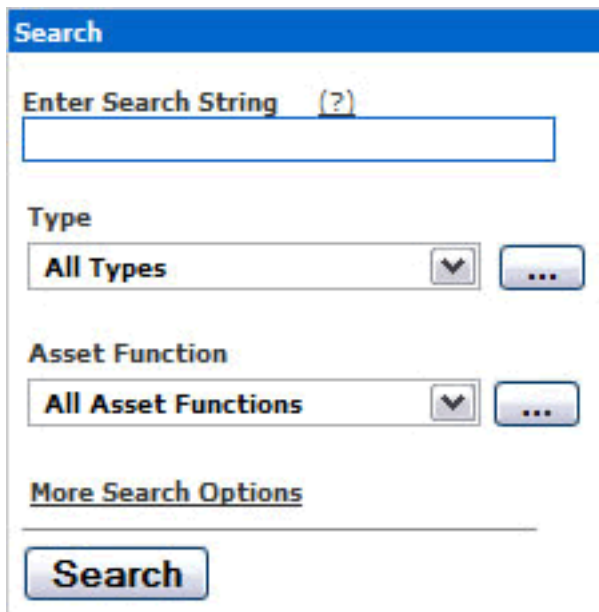
The detail of the first item in the results list automatically opens in the lower frame, as shown here:



## Performing Standard Searches

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

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



The image shows a search sidebar with a blue header labeled "Search". Below the header is a text input field with the placeholder text "Enter Search String" and a small "(?)" icon to its right. Underneath the text box are two dropdown menus. The first is labeled "Type" and has "All Types" selected, with a small downward arrow and a three-dot menu icon to its right. The second is labeled "Asset Function" and has "All Asset Functions" selected, also with a downward arrow and a three-dot menu icon to its right. Below these dropdowns is a link labeled "More Search Options" with a horizontal line underneath it. At the bottom of the sidebar is a large "Search" button.

2. Use the **Type** and **Asset Function** drop-downs to refine the search.
3. Click **Search**.

Search results are listed in the main pane.

Export to PDF  Save This Search Results (19)

<input type="checkbox"/>	Name	Version	Type	Status
<input checked="" type="checkbox"/>	ALER30 Installer Doc	0.1	Application	Registered
<input type="checkbox"/>	Bill Payment Service		Service	Registered
<input type="checkbox"/>	Sample Application - ACES		Application	Registered
<input type="checkbox"/>	Sample Application - Commercial Card Authorization System		Application	Registered
<input type="checkbox"/>	Sample Business Process - Order Verification Process	1.0	Business Process	Registered
<input type="checkbox"/>	Sample Comm Adapter - Customer Credit Information	3.0	Communication Adapter	Registered
<input type="checkbox"/>	Sample Component .NET-Find Address Method	Beta Release	Component	Registered
<input type="checkbox"/>	Sample Component J2EE - Order EJB	2.0	Component	Registered
<input type="checkbox"/>	Sample Environment - Tomcat	4.1	Environment	Registered
<input type="checkbox"/>	Sample Framework - Struts	3.2	Framework	Registered
<input type="checkbox"/>	Sample Pattern - Front Controller Design	1.0	Pattern	Registered
<input type="checkbox"/>	Sample Pattern - MVC Design	2.0	Pattern	Registered
<input type="checkbox"/>	Sample Pattern - View Helper Design	1.0	Pattern	Registered
<input type="checkbox"/>	Sample Process - SCRUM	2.0	Process	Registered
<input type="checkbox"/>	Sample Project Profile - Purchase Request Tracking System	1.0	Project Profile	Registered
<input type="checkbox"/>	Sample Service - Account Detail (dynamic)	2.0	Service	Registered
<input type="checkbox"/>	Sample Service - Account Detail (static)	1.0	Service	Registered
<input type="checkbox"/>	Sample XML Schema - MARC	1.0	XML Schema	Registered

- If necessary, [save the search](#).

## Searching For a Specific Field

This procedure is also performed in the Search box on the Assesst page by entering the appropriate search terms in the text box.

**Search**

Enter Search String (?)

Type

All Types
▼
...

Asset Function

All Asset Functions
▼
...

[More Search Options](#)

---

Search

- Use the following syntax to perform a search on *myAsset* in the **name** field only:  
*name:myAsset* .

- Use the following syntax to perform a search on *myAsset* in the **description** field only:

*description:myAsset* or *desc:myAsset*

- The prefix *wsdl:* will limit the search to the WSDL binding, port type, or port name.
  - Example: *wsdl:myService*

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

## Using the More Search Options Feature

- [Overview](#)
- [Performing a Search Using "More Search Options"](#)
- [Filtering More Search Options by Type and/or Registration Status](#)
- [Filtering More Search Options by Categorizations](#)
- [Filtering More Search Options by Additional Criteria](#)
- [Searching for Extended Metadata Fields](#)

### Overview

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

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

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

1. Click the **More Search Options** link.

The More Search Options dialog box opens.

**More Search Options** ?

Enter Search String:

Type:  Registration Status:

**Filter by Categorizations**

Find results in **ANY** of the categorizations selected below  
 Find results in **ALL** of the categorizations selected below

---

All Categorizations  
 Asset Functions  
 Asset Lifecycle Stages  
 Business Objectives  
 Classifications  
 Domains  
 Lines Of Business  
 Sources  
 Technologies

Filter by Additional Criteria

Note that the **Filter by Categorizations** option is selected by default, as is the **Find results in ANY of the categorizations selected below** option. (The actual list of categorizations is determined by the specific configuration of ALER.)

2. Enter an appropriate search string in the **Enter Search String** text box.
3. Click **Search** to run the search without further refinement.

Search results are listed in the upper frame of the main pane of the Assets page.

Name	Version	Type	Status
ALER30 Installer Doc	0.1	Application	Registered
Bill Payment Service		Service	Registered
Sample Application - ACES		Application	Registered
Sample Application - Commercial Card Authorization System		Application	Registered
Sample Business Process - Order Verification Process	1.0	Business Process	Registered
Sample Comm Adapter - Customer Credit Information	3.0	Communication Adapter	Registered
Sample Component .NET-Find Address Method	Beta Release	Component	Registered
Sample Component J2EE - Order EJB	2.0	Component	Registered
Sample Environment - Tomcat	4.1	Environment	Registered
Sample Framework - Struts	3.2	Framework	Registered
Sample Pattern - Front Controller Design	1.0	Pattern	Registered
Sample Pattern - MVC Design	2.0	Pattern	Registered
Sample Pattern - View Helper Design	1.0	Pattern	Registered
Sample Process - SCRUM	2.0	Process	Registered
Sample Project Profile - Purchase Request Tracking System	1.0	Project Profile	Registered
Sample Service - Account Detail (dynamic)	2.0	Service	Registered
Sample Service - Account Detail (static)	1.0	Service	Registered
Sample XML Schema - MARC	1.0	XML Schema	Registered

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

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

This procedure is performed in the More Search Options dialog box.

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

1. Select an appropriate type from the **Type** drop-down.
2. As necessary, select the appropriate registration status from the **Registration Status** drop-down.
3. Click **Search** to run the search without further filtering.

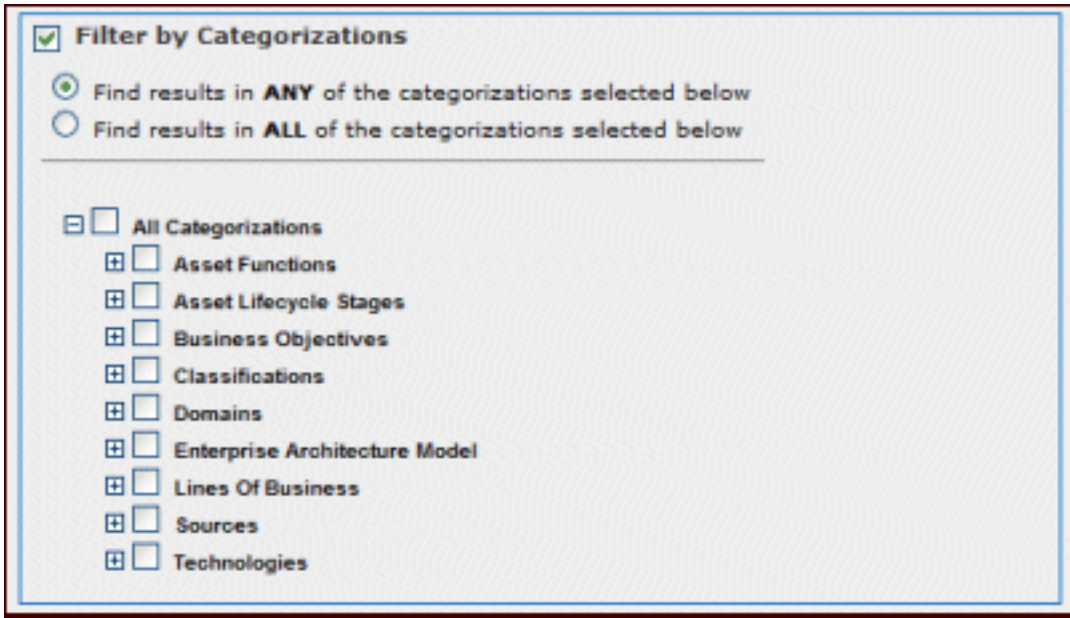
Search results are listed in the upper frame of the main pane of the Assets page.

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

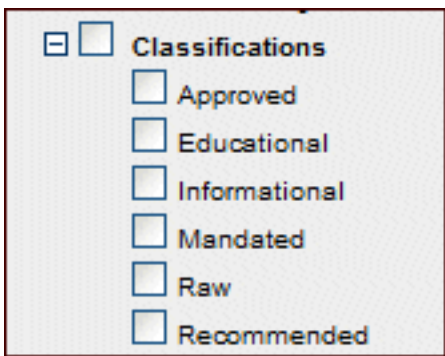
### Filtering More Search Options by Categorizations

This procedure is performed in the More Search Options dialog box.

1. Select the appropriate option in the **Filter by Categorizations** section to locate the search string in **Any** or **All** of the selected **Categorizations**.



2. Select the appropriate checkbox to determine the categorizations to be searched.
3. Click the + icon next to any categorization to expand the sub-categorization tree to further refine the search.



4. Click **Search** to run the search without further filtering.

Search results are listed in the upper frame of the main pane of the Assets page.

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

### Filtering More Search Options by Additional Criteria

This procedure is performed in the More Search Options dialog box.

1. Select the **Filter by Additional Criteria** checkbox.

The **Filter by Additional Criteria** section opens.

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

2. Select one of the options listed in the **Select a Field** drop-down. This action determines the visibility and contents of subsequent drop-down menus in the **Filter by Additional Criteria** section.
3. Select the appropriate additional parameter from the available drop-downs. This selection determines whether an additional drop-down menu or a text box appears to the left of the **Add** button.
4. As necessary, enter text in the text box, or select an item from the drop-down.
5. Click **Add**.

The search parameter appears in the large text box.

6. Add additional parameters as necessary.
7. To remove a parameter:
  - o Select (single-click) the parameter.
  - o Click **Remove**.
8. When the all search parameters have been added, click **Search**.

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

- o **Notes:**

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

9. If necessary, [save the search](#).

### Searching for Extended Metadata Fields

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

1. Select the **Filter by Additional Criteria** check box.
2. Select an extended metadata field name, such as `import.information` or `internal.import.summary` from the **Select a Field** drop-down.

The optional **Enter an XPath** field is displayed.



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

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

4. When the all search parameters have been added, click **Search**.
5. If necessary, [save the search](#).

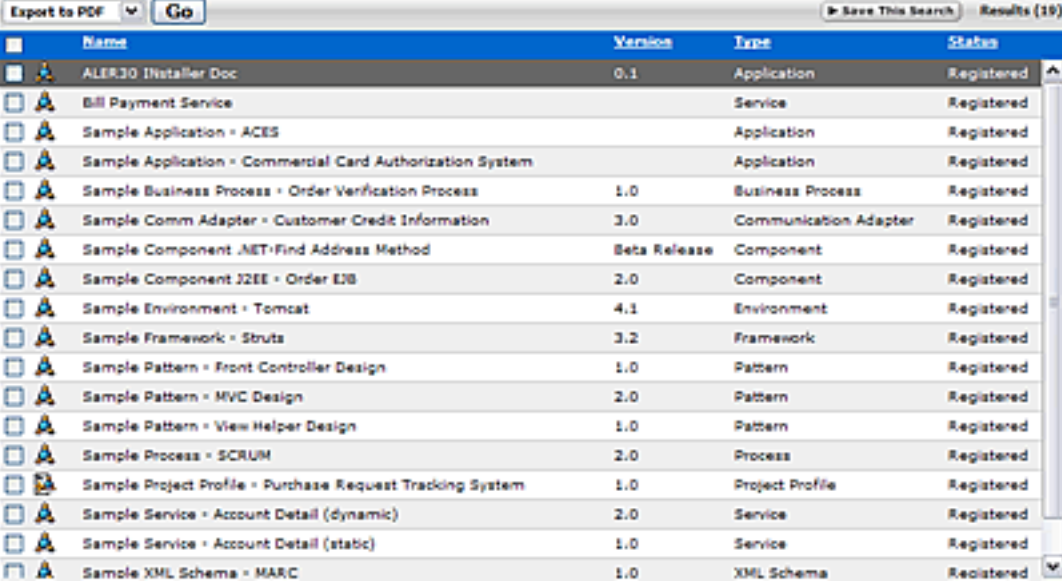
## Saving Searches

This procedure is performed on the Assets page.

(The Saved Searches feature must be activated before searches can be saved. See the *ALER Administration Guide* for more information.)

1. Perform a standard or More Search Options search.

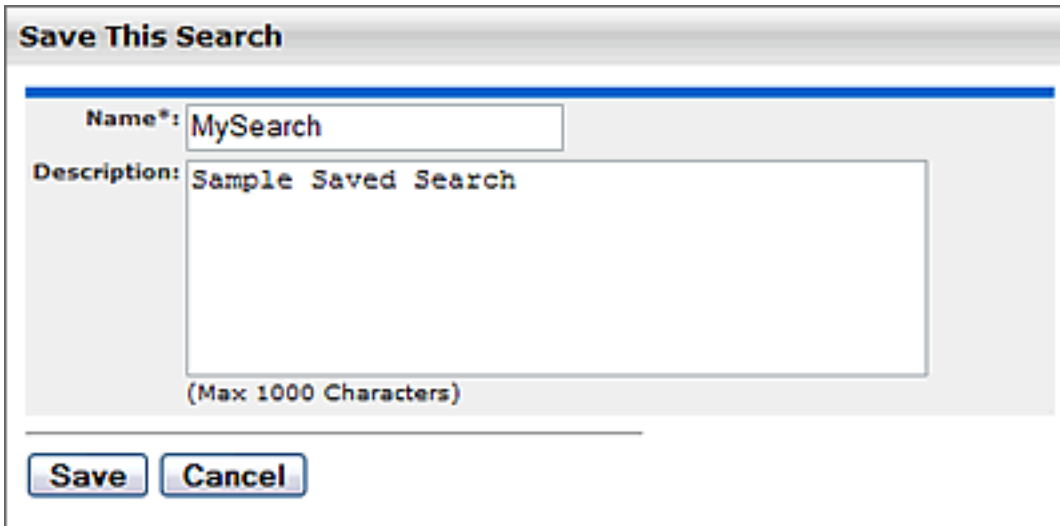
Search results appear in the upper frame of the main pane.



<input type="checkbox"/>	Name	Version	Type	Status
<input type="checkbox"/>	ALER30 Installer Doc	0.1	Application	Registered
<input type="checkbox"/>	Bill Payment Service		Service	Registered
<input type="checkbox"/>	Sample Application - ACES		Application	Registered
<input type="checkbox"/>	Sample Application - Commercial Card Authorization System		Application	Registered
<input type="checkbox"/>	Sample Business Process - Order Verification Process	1.0	Business Process	Registered
<input type="checkbox"/>	Sample Comm Adapter - Customer Credit Information	3.0	Communication Adapter	Registered
<input type="checkbox"/>	Sample Component .NET-Find Address Method	Beta Release	Component	Registered
<input type="checkbox"/>	Sample Component J2EE - Order EJB	2.0	Component	Registered
<input type="checkbox"/>	Sample Environment - Tomcat	4.1	Environment	Registered
<input type="checkbox"/>	Sample Framework - Struts	3.2	Framework	Registered
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<input type="checkbox"/>	Sample Pattern - MVC Design	2.0	Pattern	Registered
<input type="checkbox"/>	Sample Pattern - View Helper Design	1.0	Pattern	Registered
<input type="checkbox"/>	Sample Process - SCRUM	2.0	Process	Registered
<input type="checkbox"/>	Sample Project Profile - Purchase Request Tracking System	1.0	Project Profile	Registered
<input type="checkbox"/>	Sample Service - Account Detail (dynamic)	2.0	Service	Registered
<input type="checkbox"/>	Sample Service - Account Detail (static)	1.0	Service	Registered
<input type="checkbox"/>	Sample XML Schema - MARC	1.0	XML Schema	Registered

2. Click **Save This Search** (upper right, above the search results).

The **Save This Search** window opens.



**Save This Search**

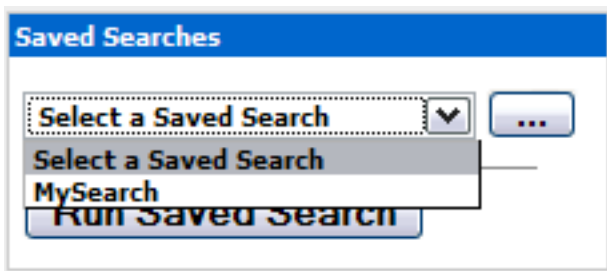
Name\*:

Description:

(Max 1000 Characters)

3. Enter the appropriate information in the **Name** and **Description** text boxes.
4. Click **Submit**.

The saved search now appears in the **Saved Searches** drop-down.

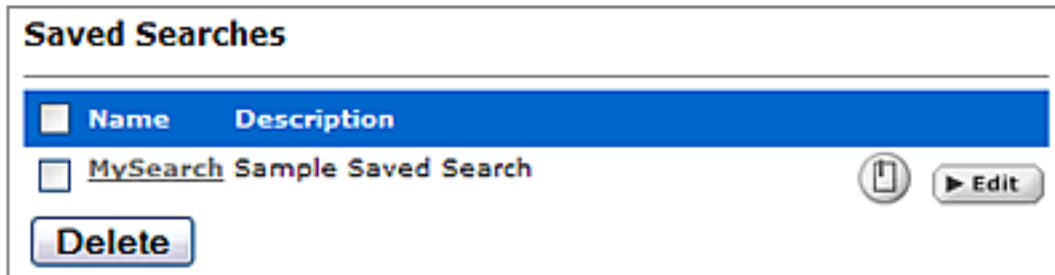


**Saved Searches**

Select a Saved Search ▼

- Select a Saved Search
- MySearch
- Run Saved Search

Saved searches are also listed in the Saved Searches section on the My Stuff page.



**Saved Searches**

<input type="checkbox"/>	Name	Description	
<input type="checkbox"/>	MySearch	Sample Saved Search	<input type="button" value="Edit"/>

## Executing a Saved Search

From the Assets page.

1. Select the search to be executed from the **Saved Searches** drop-down.
2. Click **Run Saved Search**.

Search results are listed in the upper frame of the main pane.

## Managing Saved Searches

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

### Executing a Saved Search

1. Click the text link for the search to be executed.

Search results appear in the upper frame of the main pane on the Assets page.

### Editing a Saved Search

1. Click **Edit** next to the saved search.

The **Save this Search** window opens.

2. Make changes as appropriate to the text in the **Name** and **Description** fields. (Search parameters cannot be edited.)
3. Click **Save**.

### Deleting a Saved Search

1. Select the check box for the search to be deleted. (Select the **Name** check box to select ALL saved searches.)
2. Click **Delete**.

The selected search is deleted.

### Linking to a Saved Search

1. Right-click over the text link and copy the URL. The browser's pop-up menu opens.

2. Use the copied link information to create a direct link to the saved search. The correct syntax is:  
`http://servername/appname/index.jsp?savedsearchid=SEARCHID`, where `SEARCHID` is the ID number of the saved search.

## Factors Affecting Search Results

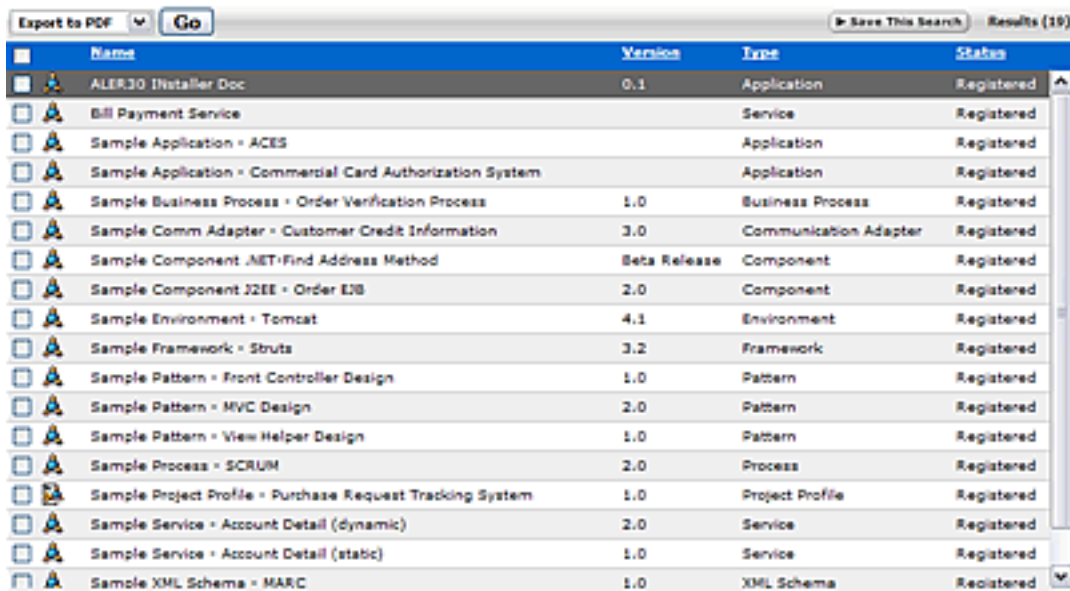
- Search results may change over time as assets are added to/removed from ALER.
- Individual search results are subject to user permission settings.
- Activation of the Assets-in-Progress feature may affect the results of existing Saved Searches.

## Printing Search Results

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

1. Perform a search.

The search results list appears in the upper frame of the Assets page.



Name	Version	Type	Status
ALER30 Installer Doc	0.1	Application	Registered
Bill Payment Service		Service	Registered
Sample Application - ACES		Application	Registered
Sample Application - Commercial Card Authorization System		Application	Registered
Sample Business Process - Order Verification Process	1.0	Business Process	Registered
Sample Comm Adapter - Customer Credit Information	3.0	Communication Adapter	Registered
Sample Component .NET-Find Address Method	Beta Release	Component	Registered
Sample Component J2EE - Order EJB	2.0	Component	Registered
Sample Environment - Tomcat	4.1	Environment	Registered
Sample Framework - Struts	3.2	Framework	Registered
Sample Pattern - Front Controller Design	1.0	Pattern	Registered
Sample Pattern - MVC Design	2.0	Pattern	Registered
Sample Pattern - View Helper Design	1.0	Pattern	Registered
Sample Process - SCRUM	2.0	Process	Registered
Sample Project Profile - Purchase Request Tracking System	1.0	Project Profile	Registered
Sample Service - Account Detail (dynamic)	2.0	Service	Registered
Sample Service - Account Detail (static)	1.0	Service	Registered
Sample XML Schema - MARC	1.0	XML Schema	Registered

2. Click anywhere in the list to select the browser frame.

- o Option 1\*

1. Select **Print** on the Internet Explorer **File** menu.
2. Click the **Options** tab in the **Print** pop-up.
3. Select the **Only the selected frame** option.
4. Click **Print**.

The document is sent to the printer.

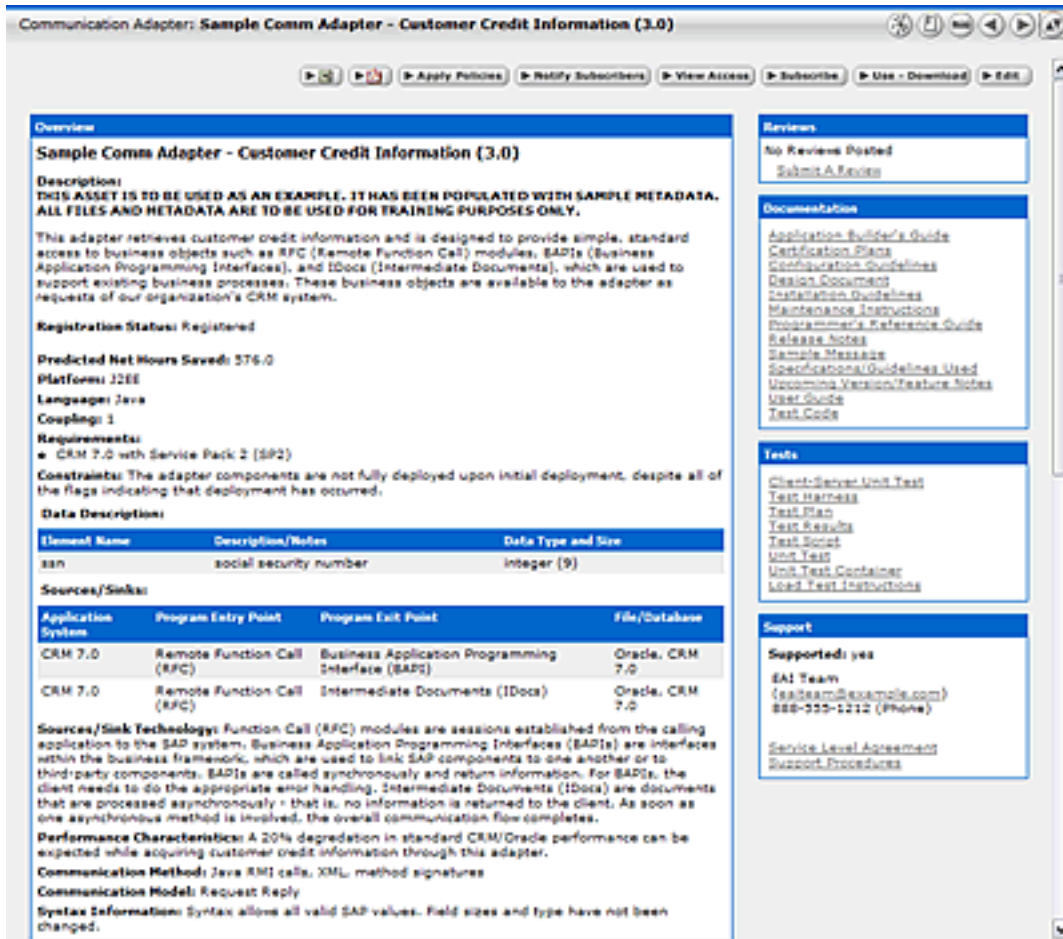
- o Option 2\*

1. Select **Print Preview** on the Internet Explorer **File** menu.
2. Select **Only the selected frame** in the drop-down.
3. Click **Print**. The document is sent to the printer.





- Click the **Hide/Display Search Results** icon  to expand the Asset Detail. (Click again to restore the search results list in the upper frame.)



**Communication Adapter: Sample Comm Adapter - Customer Credit Information (3.0)**

**Overview**  
**Sample Comm Adapter - Customer Credit Information (3.0)**

**Description:**  
 THIS ASSET IS TO BE USED AS AN EXAMPLE. IT HAS BEEN POPULATED WITH SAMPLE METADATA. ALL FILES AND METADATA ARE TO BE USED FOR TRAINING PURPOSES ONLY.

This adapter retrieves customer credit information and is designed to provide simple, standard access to business objects such as RFC (Remote Function Call) modules, BAPIs (Business Application Programming Interfaces), and IDocs (Intermediate Documents), which are used to support existing business processes. These business objects are available to the adapter as requests of our organization's CRM system.

**Registration Status:** Registered

**Predicted Net Hours Saved:** 576.0

**Platforms:** J2EE

**Languages:** Java

**Couplings:** 1

**Requirements:**

- CRM 7.0 with Service Pack 2 (SP2)

**Constraints:** The adapter components are not fully deployed upon initial deployment, despite all of the flags indicating that deployment has occurred.

**Data Description:**

Element Name	Description/Notes	Data Type and Size
ssn	social security number	Integer (9)

**Sources/Sinks:**

Application System	Program Entry Point	Program Exit Point	File/Database
CRM 7.0	Remote Function Call (RFC)	Business Application Programming Interface (BAPI)	Oracle, CRM 7.0
CRM 7.0	Remote Function Call (RFC)	Intermediate Documents (IDocs)	Oracle, CRM 7.0

**Sources/Sink Technology:** Function Call (RFC) modules are sessions established from the calling application to the SAP system. Business Application Programming Interfaces (BAPIs) are interfaces within the business framework, which are used to link SAP components to one another or to third-party components. BAPIs are called asynchronously and return information. For BAPIs, the client needs to do the appropriate error handling. Intermediate Documents (IDocs) are documents that are processed asynchronously - that is, no information is returned to the client. As soon as one asynchronous method is involved, the overall communication flow completes.

**Performance Characteristics:** A 20% degradation in standard CRM/Oracle performance can be expected while acquiring customer credit information through this adapter.

**Communication Method:** Java RMI calls, XML method signatures

**Communication Model:** Request Reply

**Syntax Information:** Syntax allows all valid SAP values. Field sizes and type have not been changed.

**Reviews**  
 No Reviews Posted  
[Submit A Review](#)

**Documentation**

- [Application Builder's Guide](#)
- [Certification Plans](#)
- [Configuration Guidelines](#)
- [Design Document](#)
- [Installation Guidelines](#)
- [Maintenance Instructions](#)
- [Programmer's Reference Guide](#)
- [Release Notes](#)
- [Sample Messages](#)
- [Specifications/Guidelines Used](#)
- [Upcoming Version/Feature Notes](#)
- [User Guide](#)
- [Test Code](#)

**Tests**

- [Client-Server Unit Test](#)
- [Test Harness](#)
- [Test Plan](#)
- [Test Results](#)
- [Test Script](#)
- [Unit Test](#)
- [Unit Test Container](#)
- [Load Test Instructions](#)

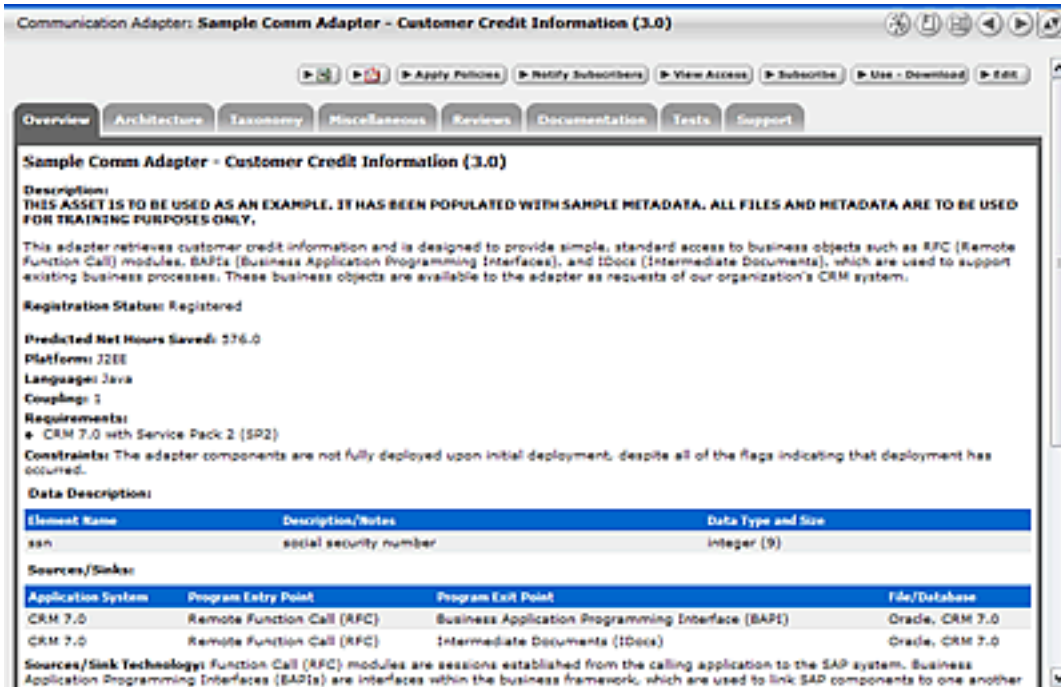
**Support**

**Supported:** yes


**EAI Team**  
 (eai@bea.com) (eai@bea.com)  
 888-555-1212 (Phone)

[Service Level Agreement](#)  
[Support Procedures](#)

- Click the **View Details of this Item in Tabs** icon  to toggle the Tabbed View mode.

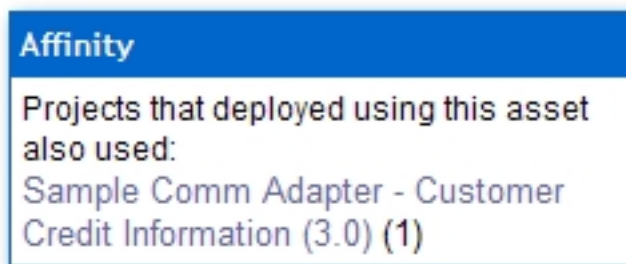


The Tabbed View places the information from each element in the default asset detail on its own tab. When viewing assets of the same type in Tabbed View mode, the selected tab appears for each asset selected from the search results, facilitating easy comparison of asset information. When viewing assets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

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

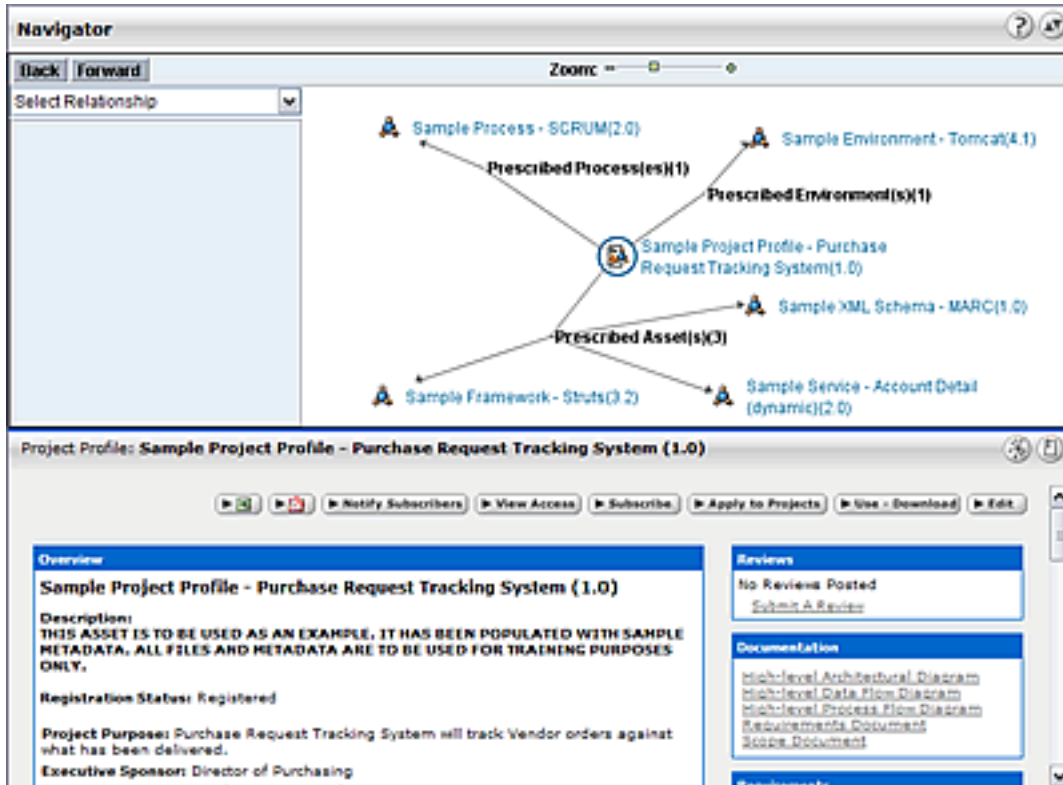
## Asset Affinity

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



Affinity provides valuable contextual information on asset use.





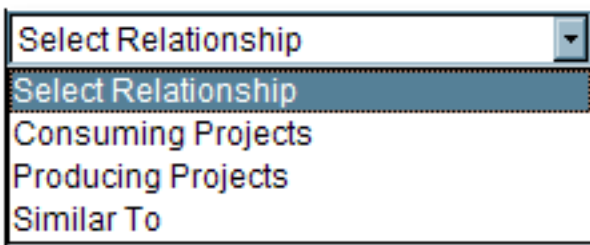
## The Navigator View

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

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

## Relationship View

The Select Relationship menu displays a list of relationships relevant to the in-focus asset.







3. Select **Export to Excel** in the drop-down at the top of the pane.
4. Click **Go**.

Export progress is indicated in the progress window, with the following options:

- o Click **Terminate Job** to end the export.
- o Click **View Audit Log** to open a log of the export process.

5. When the export is complete, click **View Excel Spreadsheet** in the progress window.

The spreadsheet opens in Microsoft Excel.

	A	B	C
1	Type Name: Component	Number of Assets: 2	Time of Export: Mon Jan 09 16:45:01 EST 2006
2		<b>Sample Component .NET-Find Address Method (Beta Release)</b>	<b>Sample Component J2EE - Order EJB (2.0)</b>
3	<b>Overview</b>		
4	Name	Sample Component .NET-Find Address Method (Beta Release)	Sample Component J2EE - Order EJB (2.0)
5	Description	THIS ASSET IS TO BE USED AS AN EXAMPLE. IT HAS BEEN POPULATED WITH SAMPLE METADATA. ALL FILES AND METADATA ARE TO BE USED FOR TRAINING PURPOSES ONLY. Using the Microsoft MapPoint web service, this component finds geographic locations in a specified data source based on an address. An array of possible results ordered by score, the top score, the number of results found, and the index into the array of results, is returned as a FindResults object. Maximum returned values is 250. Default number of returned results is 25.	THIS ASSET IS TO BE USED AS AN EXAMPLE. IT HAS BEEN POPULATED WITH SAMPLE METADATA. ALL FILES AND METADATA ARE TO BE USED FOR TRAINING PURPOSES ONLY. Order EJB provides the ability to view the details of a customer order. This Sample Application is for the Java 2 Platform, Enterprise Edition Order EJB Component.
6	Predicted Net Hours Saved	342	855
7	Platform	.NET	J2EE
8	Client Platforms	IE	Windows
9		Netscape	
10		Mozilla	
11	Language	C#	Java
12	Constraints	The FindAddress method is valid with only the MapPoint EU and MapPoint NA data sources. For a table of the available data sources and the functions that can be performed on the data source, see MapPoint .NET Data Sources and Capabilities.	Customer orders must have been approved before viewed with this component. The order validation process requires manual intervention and lag time can be up to one hour.
13	Packaging Description	Modifiable source files have been combined and are available in a single .zip file	Class library is packaged as a .zip file
14			
15	<b>Taxonomy</b>		
16	Asset Type	Component	Component
17	Classification	Educational	Recommended
18	Asset Function	Customer Information Acquisition	Application Adapters
19		Geographic Address Locators	Customer Information Acquisition
20	Domains	Customer Service	Customer Service
21		Marketing	Finance/Accounting
22		Sales & Distribution	Sales & Distribution
23	Line Of Business	[Product Line 1]	[Product Line 1]
24		[Service Offering 2]	[Product Line 2]
25			[Service Offering 1]
26			[Service Offering 2]
27	Technology	.NET	J2EE
28	Keywords	gps	commerce
29		street address	inventory

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



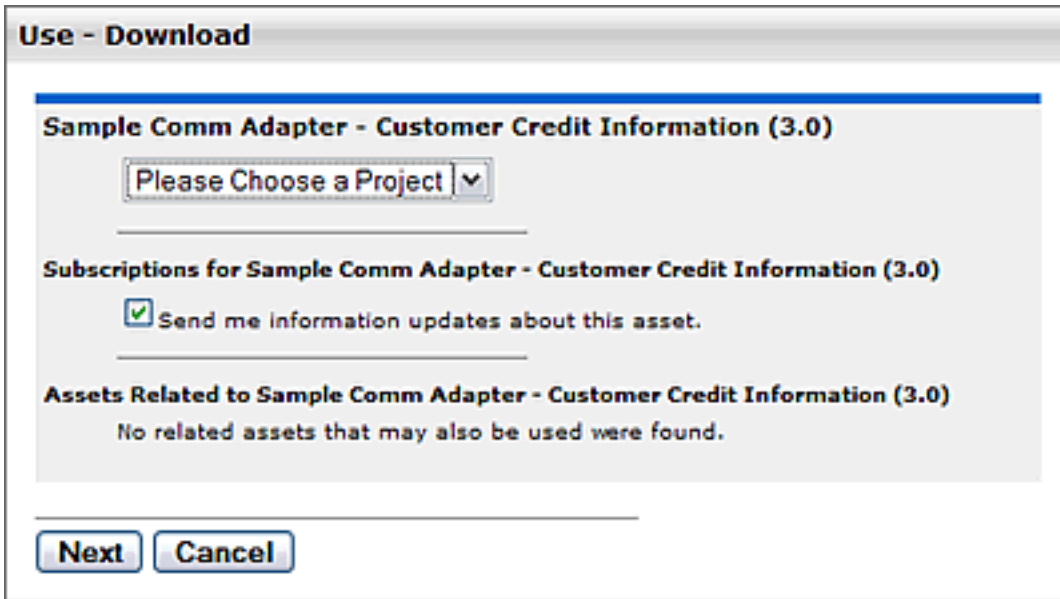






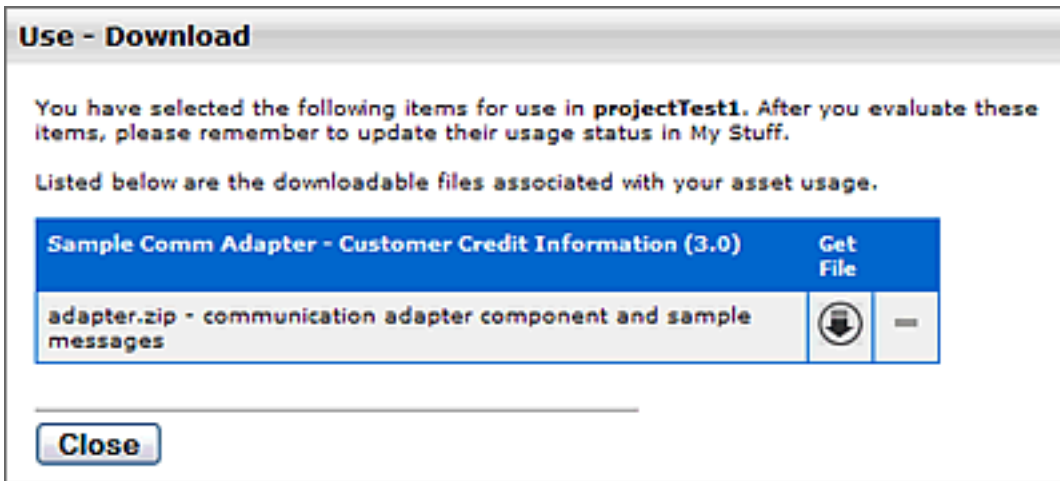






3. Use the **Please Choose a Project** drop-down to assign the asset to a project (mandatory).
4. Make the appropriate selection in the **Subscription** check box.
5. As necessary, select any available related assets for inclusion in the download and/or subscription.
6. Click **Next**.

A new pop-up opens to display the downloadable files in the asset payload.



7. Click the **Get File** icon.
- The **File Download** pop-up opens.
8. Proceed with the download as necessary.
9. Repeat Steps 7 and 8 as necessary to download other files in the asset payload.
10. When finished, click **Close** to close the **Use - Download** pop-up.











## 2. Consumer Gross Savings

Please quantify the total time in hours this asset saved you, before subtracting the time it took you to find and use the asset. When estimating your gross savings, please consider:

- Cost avoided -- the extra cost you would have incurred in your project if you did not have access to this asset
- If this was a tangible asset that you leveraged (code, design, algorithm, test plan, documentation), the time that it would have taken to create the equivalent functionality.
- If this was an intangible asset that you learned from (knowledge, methodology, etc.), the extra time that it would have taken without the information from this source.

(hours)

3. **Consumer Time to Reuse** records the total time (hours) it took for the consumer to use or integrate the asset in the project.

## 3. Consumer Time to Reuse

Please quantify the time in hours you spent finding, analyzing, modifying, adapting, or integrating the asset in order to realize any savings

(hours)

4. **Usage** records how the value of this asset was realized (reference, black box, white box, or reuse through integration).

## 4. Usage

Please select the one choice that best describes how the value of this asset was realized

- Reference Value Only (no reuse per se -- informational)
- Reuse Without Changes ("black box" reuse)
- Reuse With Changes ("white box" reuse)
- Reuse Through Integration (for example, use of a runtime service)

**Update**

When the survey is complete, click **Update**.



3. Enter the appropriate information in the **Name**, **Version**, and **Description** text boxes in the Overview section. (Required)

4. Enter the appropriate information in the **Comments** section. (Optional)
5. As necessary, designate the project that produced the asset by using the >> and << icons to move the appropriate item from the Available Projects to the Selected Projects columns.

6. Enter the URL of the file containing the asset to be submitted in the **File's Location URL** text box in the File Information section.

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

1. Click **Test** to validate that the file location URL is correct.
2. When finished, click **Submit**.

The **Asset Submission** confirmation pop-up appears, confirming that the asset has entered the asset registration queue.





## Viewing Project Details

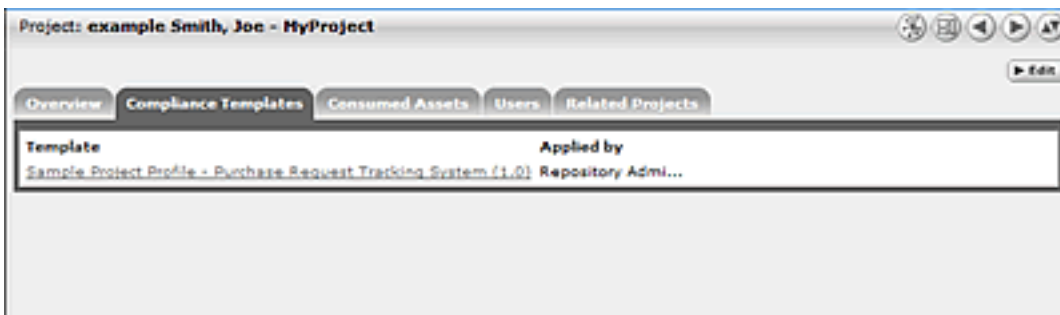
Project information is displayed the same as asset information, using a series of tabs:

### Overview

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

### Compliance Templates

Displays the **Compliance Template(s)** assigned to the project.



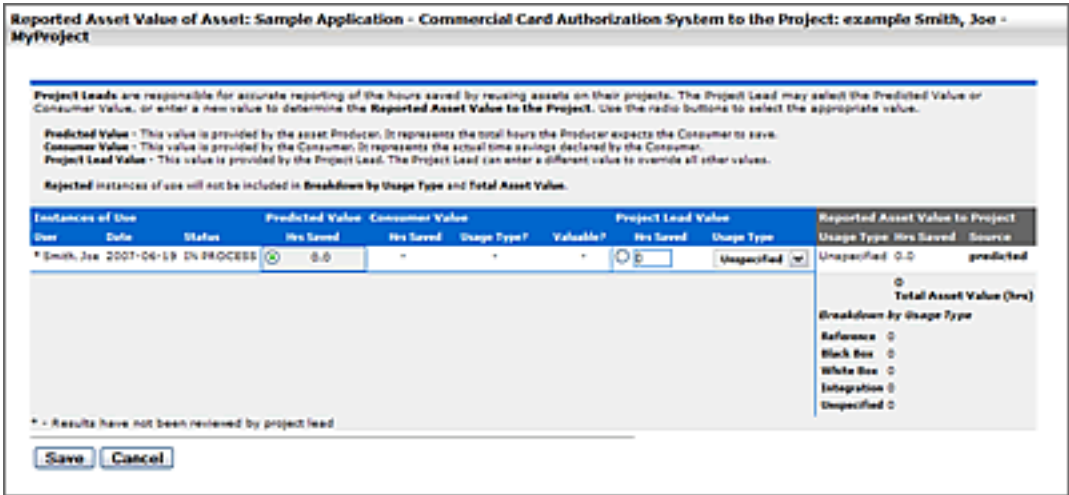
### Consumed Assets

Lists any assets used in (or under consideration for use in) the project.



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

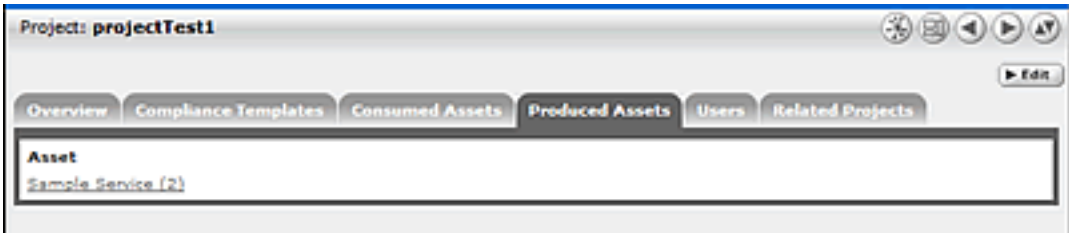
- Project members can view the **Asset Usage Detail**.
- Project leaders can view/edit the **Reported Asset Value**.



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

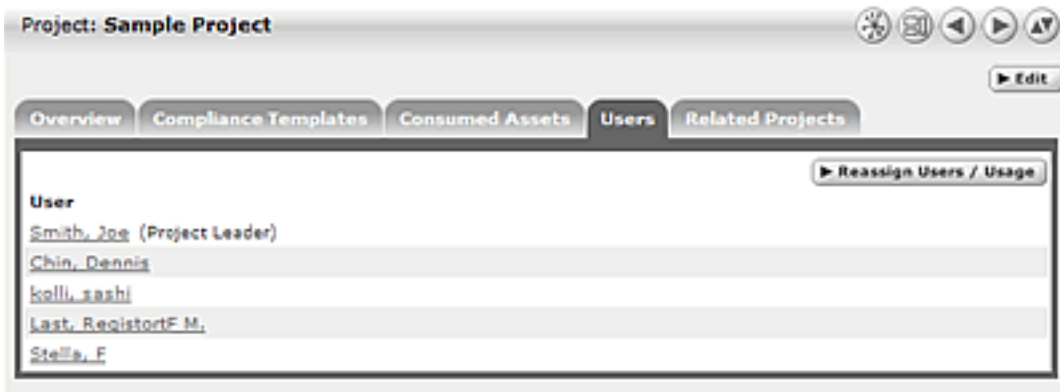
**Produced Assets**

Lists any assets produced by the project.



**Users**

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



## Related Projects

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

## Creating a Project

This procedure is performed on the **Projects** page.

1. In the left panel, click **Create New**.

The Create New Project pop-up opens.

**Create New Project**

**Overview**

Name\*:

Description:   
(Max 4000 Characters)

Estimated Development Hours:

Start Date\*: 2007-06-24

Department\*: Select Department

Status: Open

Automatically assign to new users?

**Users**

Project Leaders\*  Project Members

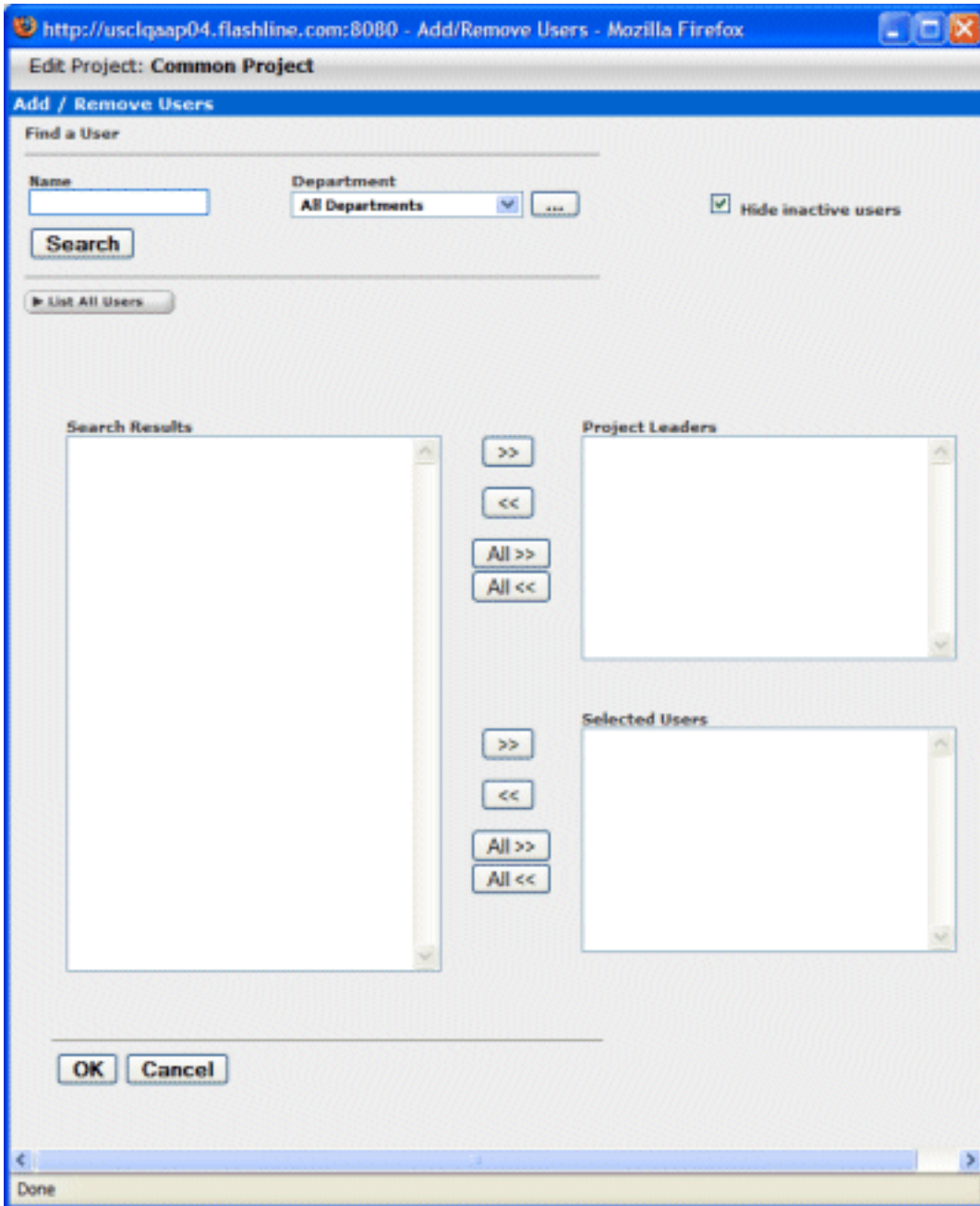
**Related Projects**

Parent Projects  Child Projects

\*Denotes required field

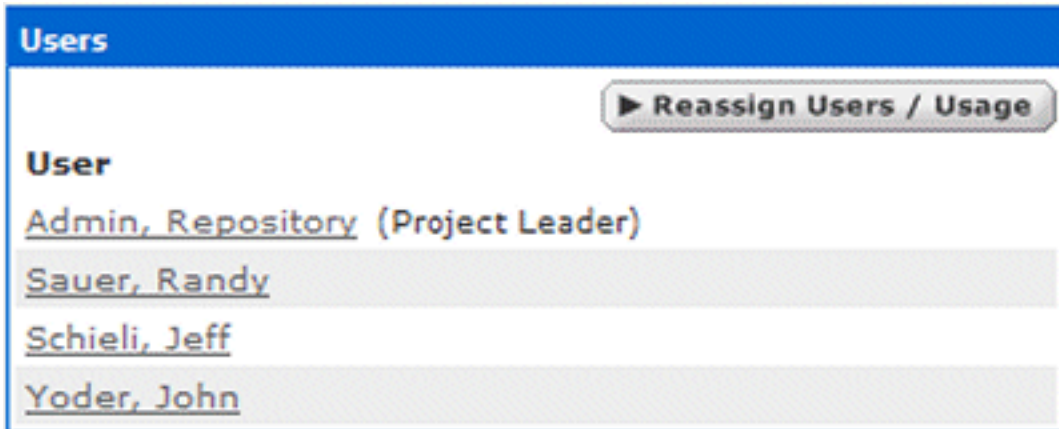
2. Enter the appropriate information in the **Name**, **Description**, and **Estimated Development Hours** text boxes.
3. Click the ... button to open the calendar to select a **Start Date**.
4. Select a department from the **Department** drop-down.
5. Select the appropriate status in the **Status** drop-down.
6. If necessary, select **Automatically Assign New Users**.
7. Click **Edit** in the Users section.

The Add/Remove Users pop-up opens.



8. Use **Search** or **List All Users** to display a list of users in the Search Results section.
  - Use the **Department** drop-down to filter search results.
9. Use the >> and << icons to move users between the Search Results, Project Leaders, and Selected Users sections.
10. Click **OK**.

The assigned **Project Leaders** and **Project Members** appear in the Users section of the Create New Project pop-up.



11. Click **Save**

The Create New Project pop-up closes, and the new project detail appears on the Projects page.



## Editing a Project

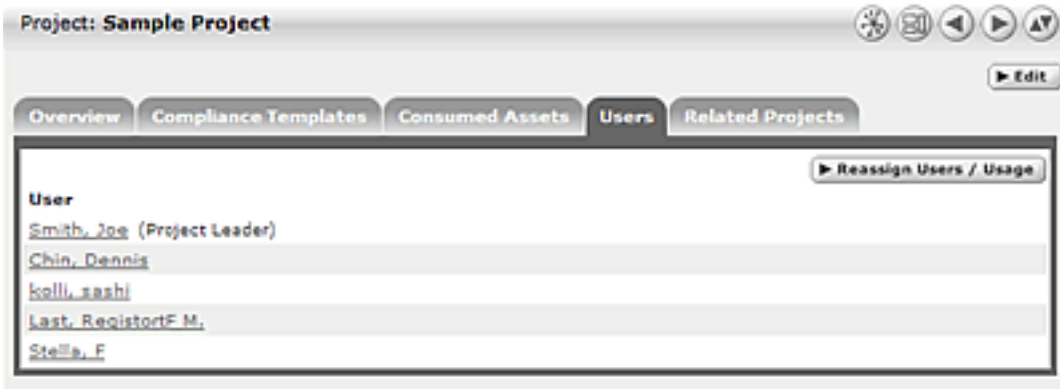
This procedure is performed on the **Projects** page.

1. Use **Search** or other means to locate the project to be edited.
2. Click **Edit** in the project detail.
3. Edit the project information as necessary. (See [Create a Project.](#))

## Reassigning Users / Usage

This procedure is performed on the **Projects** page.

1. Select the **Users** tab.



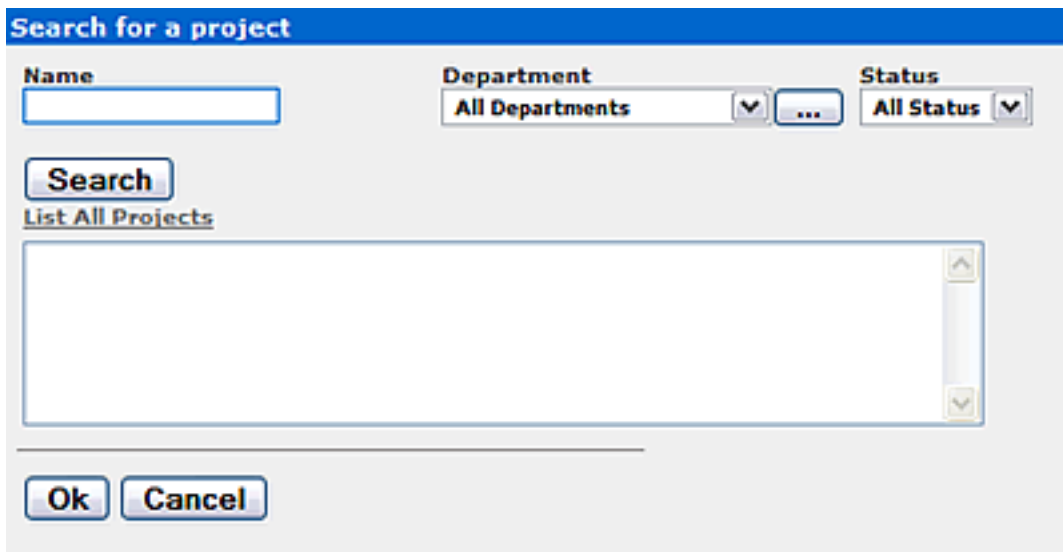
2. Click **Reassign Users/Usage**.

The Reassign pop-up opens.

3. Use the radio buttons to select the appropriate action.

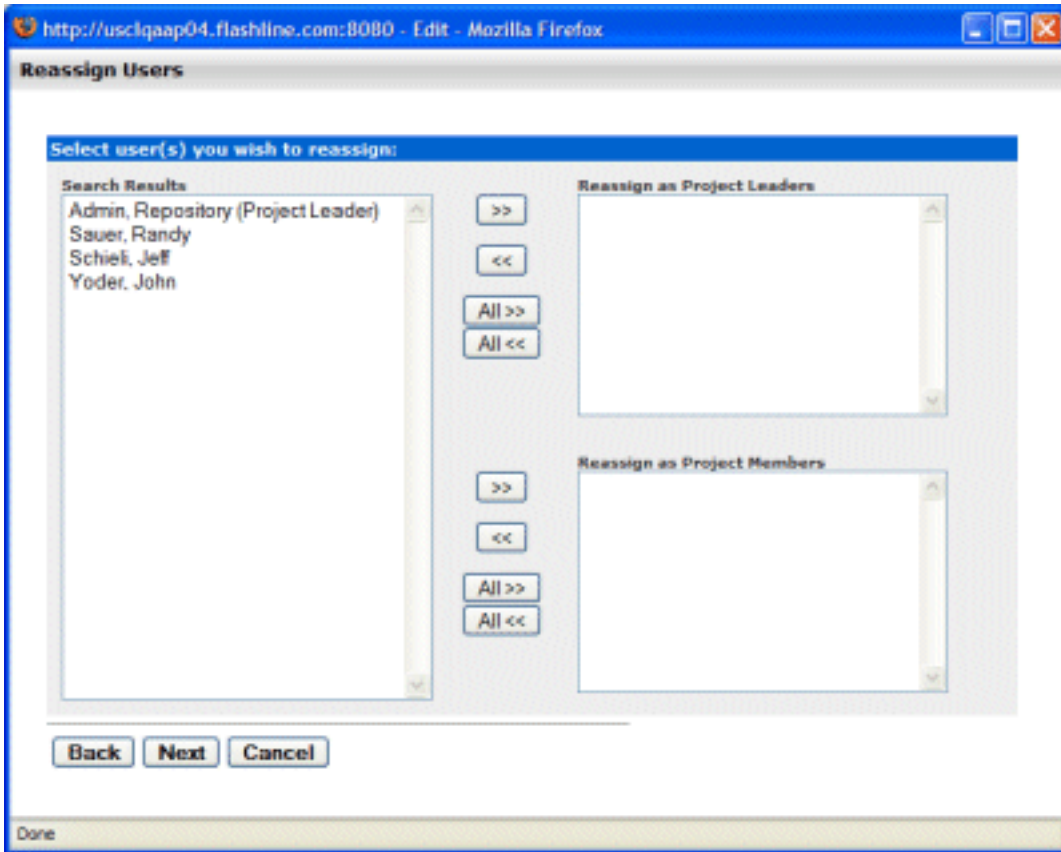
4. Click **Choose a New Project**.

The Search for a Project pop-up opens.



5. Use **Search** or **List All Projects** to display a list of projects.
6. Select the project to which the users and/or usages are to be reassigned.
7. Click **Ok**.
8. Click **Next**.

The **Select users you wish to reassign** pop-up opens.



9. Use the >> and << icons to reassign users as Project Leaders and/or Project Members.
10. Click **Next**.  
A confirmation message appears.
11. Click **Done**.

## Locating a Project

This procedure is performed on the **Projects** page.

1. Enter a keyword or search term in the **Name** text box.
2. Use the **Department** and **Status** drop-downs as necessary to filter the search.
3. If enabled, you can also filter by **Categorizations**.
4. Click **Search**.

Search results are listed in the main pane.

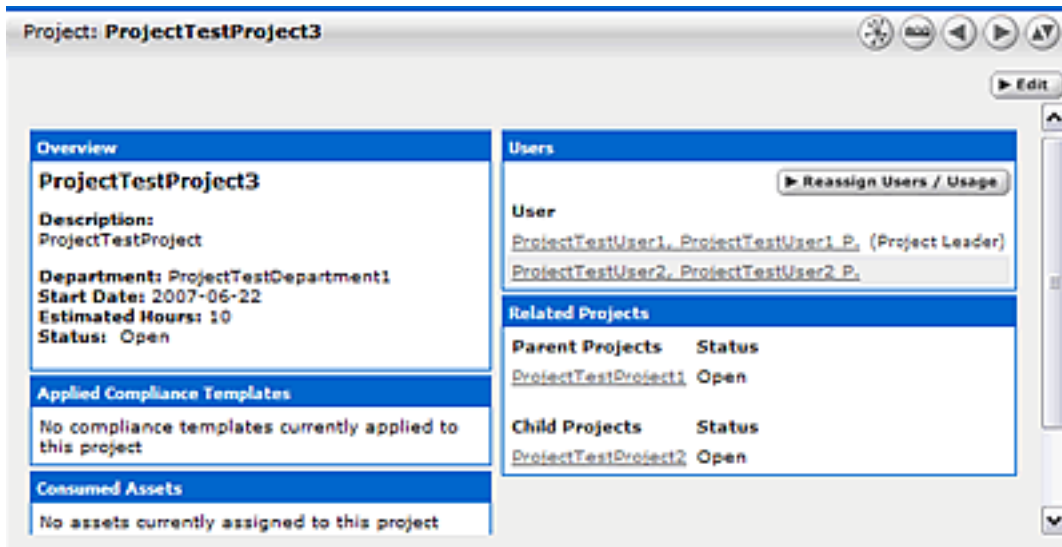






2. Select the project to be edited.

The Project Detail opens in the bottom section of the main pane.



3. Click **Edit** in the Project Detail.

The Edit Project pop-up opens.

**Edit Project: example Smith, Joe - MyProject**

**Overview**

Name\*: example Smith, Joe - MyProj

Description: User defined project: example Smith, Joe - MyProject  
 (Max 4000 Characters)

Estimated Development Hours: 0

Start Date\*: 2007-06-19

Department\*: Development

Status: Open

Automatically assign to new users?

**Users** [▶ Edit](#)

Project Leaders\*  
Smith, Joe

Project Members

**Related Projects** [▶ Edit](#)

Parent Projects

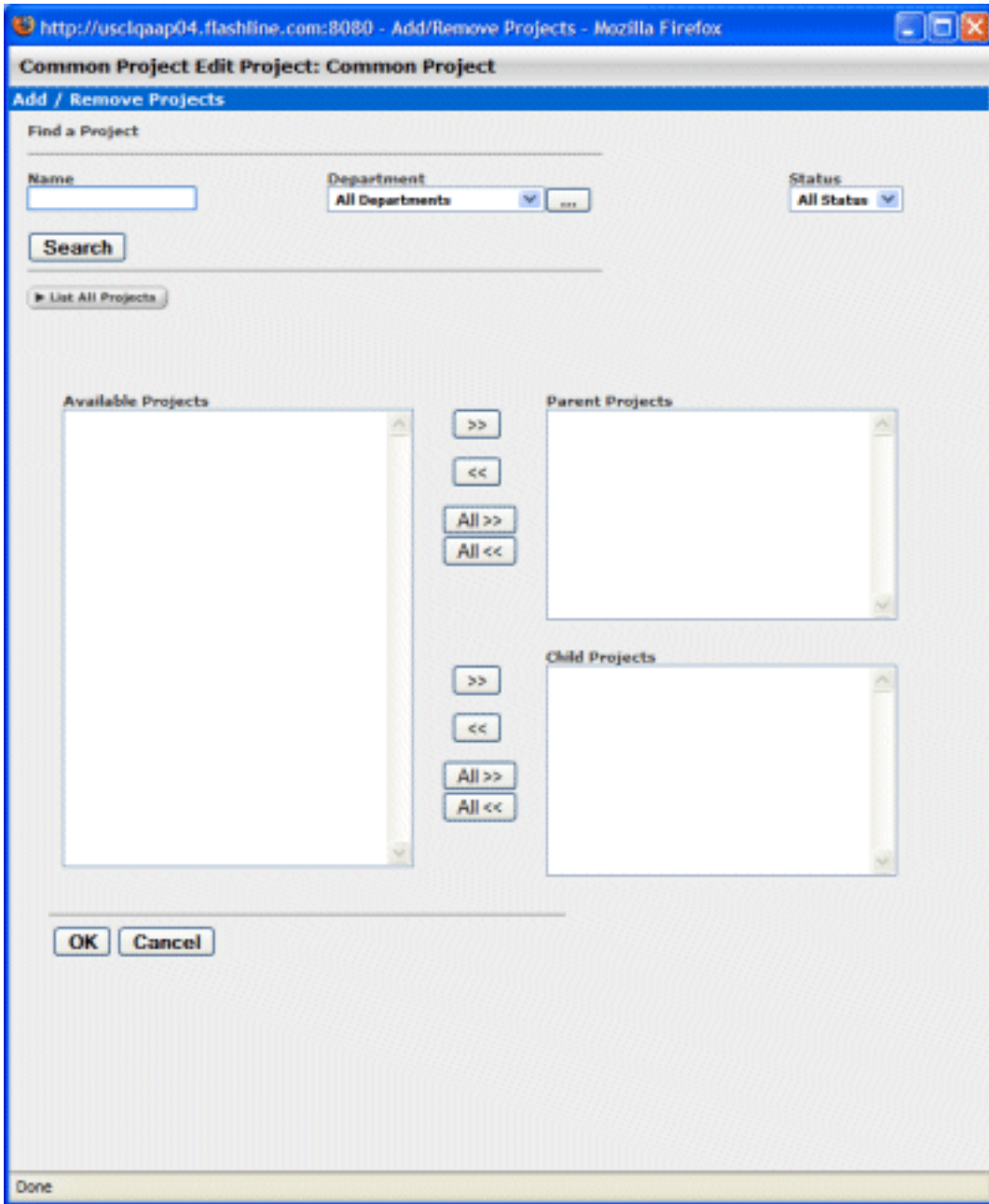
Child Projects

\*Denotes required field

[Save](#) [Cancel](#)

4. Click **Edit** in the **Related Projects** section of the Edit Projects pop-up.

The Add/Remove Projects pop-up opens.



5. Click **List All Projects**.

A list appears in the Available Projects window.

6. Select the project to be added and use the **>>** icon to move it to either the Parent Projects or the Child Projects category window, as appropriate.

The project appears in the selected window.

7. Click **OK** to close the Add/Remove Projects pop-up.

The new project relationship appears in the appropriate list in the Related Projects section of the Edit Project pop-up.





- Update the asset's usage status. (See [Consumer Survey of Asset Value](#).)
- Submit an asset review. (See [Reviewing Assets](#).)
- View an asset overview (the asset detail).

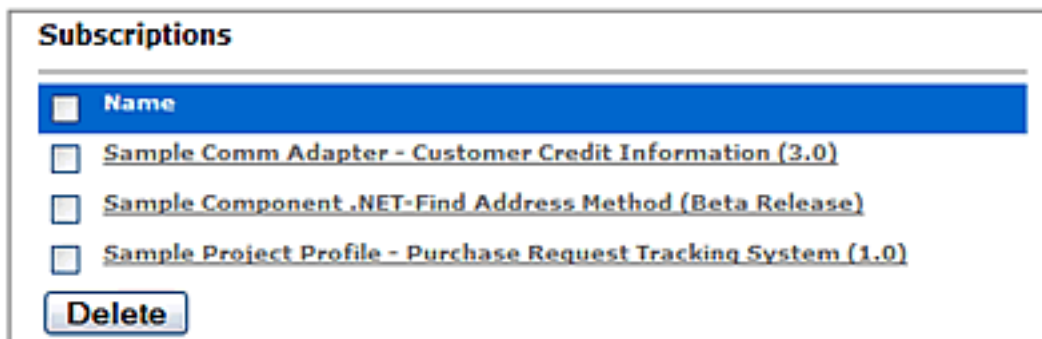
## Assets

Lists assets according to Registration status. (See the *ALER Registrar Guide*.)

## Subscriptions

Lists all asset subscriptions. (See [Asset Subscriptions](#).)

- Click any listed asset to view the asset detail.



## Delete an Asset Subscription

1. Use the check box to select the asset to be deleted.
2. Click **Delete**.

The subscription is canceled and removed from the list.

## Saved Searches

Lists all saved searches. (See [Saving Searches](#).)

- Click any listed search to display the search results.





## My Email Notifications

This folder allows you to view and modify the email notification list.

### Email Notifications

---

Inform the following distribution list when I am notified during asset registration workflow.

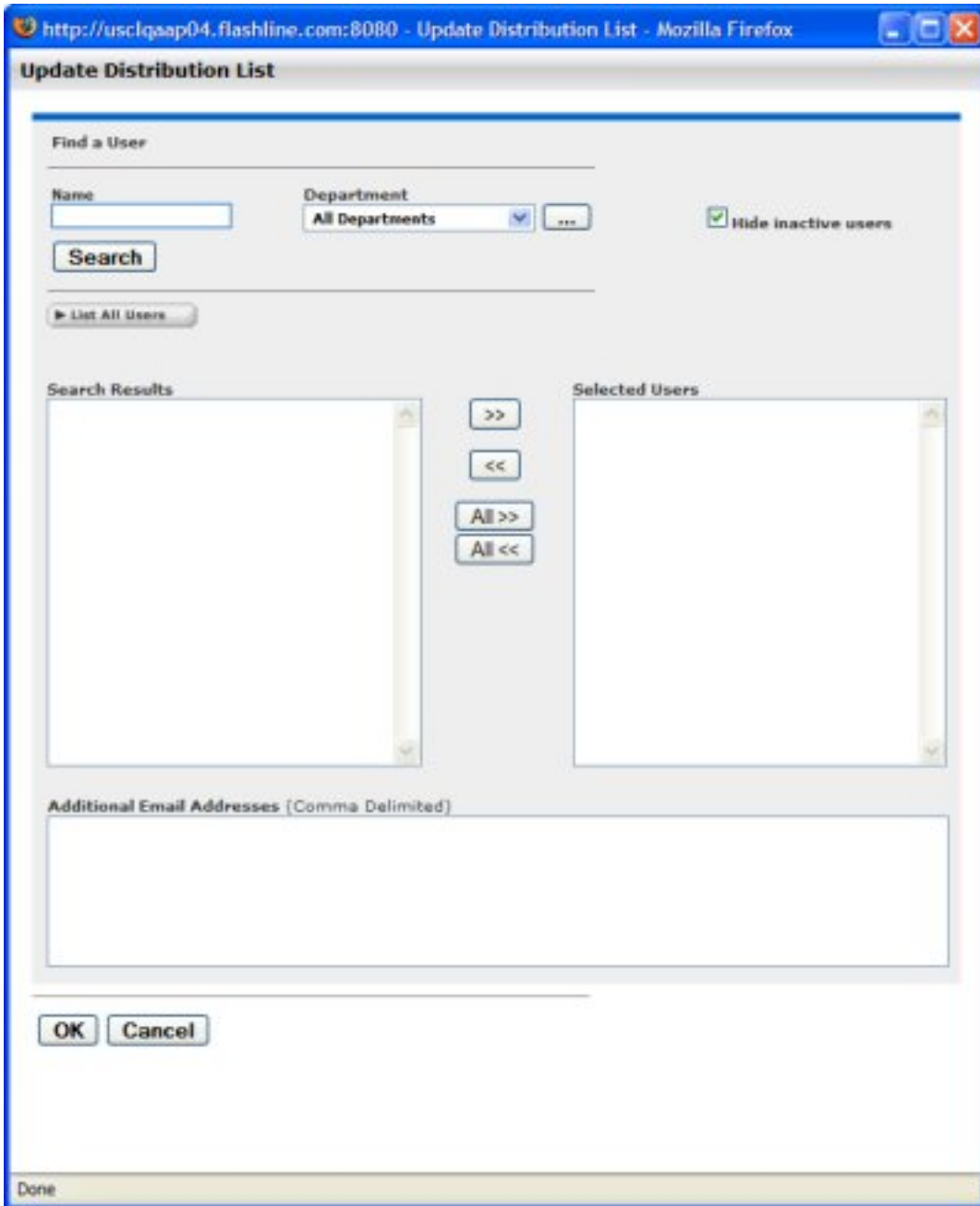
*You do not have any users or emails in your distribution list..*

Create a distribution list: [Create List](#)

## Creating a Distribution List

Follow these steps to create an e-mail distribution list.

1. Click **Create** to open the Update Distribution List dialog box.



2. To find specific internal users:

1. Enter appropriate text in the **Name** text box.
2. Use the **Department** drop-down to narrow the search.
3. Click **Search**.

Search results appear in the list in the Search Results column.

**Note:** To further filter the search results, select the **Hide Inactive Users** check box.

3. To list all internal users, click **List All Users**.





- **Asset Production Detail by Project** (requires the asset production tracking feature to be enabled)
  - Shows the individual assets used in a project, as well as the hours saved by using the asset. Managers can use this report to reward groups or individuals for reusing assets; architects and registrars can use the report to spot emerging standards in a portfolio. Managers can also use this report to quantify the value produced for clients.
- **Asset Use (by Project)**
  - Shows individual assets used in a project, as well as the hours saved by using the asset. Managers can use this report to reward groups or individuals for reusing assets; architects and registrars can use the report to spot emerging standards in a portfolio. Managers can also use this report, with project leads, to quantify value produced for clients.
- **Project Compliance** (assumes use of Compliance Templates)
  - Shows the Compliance Templates applied to projects and whether the project is in compliance with the template.

## Asset Portfolio Management Reports

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

- **Asset Portfolio Valuation**
  - Shows the number of assets used, how frequently each asset was used and the total savings in reuse time. Architects and registrars may use the report to find the most valuable and valued assets.
- **Asset Ratings**
  - Shows consumer ratings for assets. Architects and registrars may use the report to chart the perceived value of assets, while producers and maintainers can use the report as a feedback mechanism.
- **Asset Rejections**
  - Shows the reasons why an asset was rejected for use in a project. Architects and registrars may use this report to gauge the level of demand for specific assets, while producers and maintainers can use the report as a feedback mechanism.
- **Asset Status**
  - Shows the asset name, type and status (active, inactive, and so on). Registrars may use this report to determine the level of asset lifecycle maintenance required for the asset portfolio.
- **Asset Use (by Project)**
  - Shows individual assets used in a project, as well as the hours saved by using the asset. Managers can use this report to reward groups or individuals for reusing assets; architects and registrars can use the report to spot emerging standards in a portfolio. Managers can also use this report, with project leads, to quantify value produced for clients.
- **Consumer Reported Asset Value (by Asset)**
  - Shows the consumer reported savings associated with an asset, along with the predicted

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

- **Search Criteria**
  - Shows the number of results of each search parameter. Architects and registrars may use this report to define taxonomies.
- **Searches Producing No Results**
  - Shows the search parameters in a search that produced no results. Ultimately, the report shows areas of unmet demand in the registry. Registrars and architects may use this report to refine taxonomies.
- **Searches Producing the Most Results**
  - Shows the search parameters in searches that returned the most results. This report may be used by architects and registrars to determine if users are finding required information in the registry. The report may also be used to refine taxonomies.
- **Submitted Asset Status**
  - Indicates asset status in the approval cycle. Registrars may use this report to determine scheduling for assets requiring work.
- **Subscribers to Asset Notifications**
  - Shows specific subscribers to asset information. This report may be used by architects and registrars to determine the level of demand on assets in the portfolio.

## **Asset Release Management Reports**

Used primarily by asset producers and maintainers, these reports inform these users about asset refinements and enhancements, determine the effect of an asset change to the consumer community and consuming projects. In addition, these reports identify stakeholders who need to be notified about changes. Asset release management reports include:

- **Asset Deployments**
  - Shows the names of deployed assets and the projects with which they are associated. Used by producers, maintainers, and project leads to assess the effect of change to an asset.
- **Asset Usages**
  - Lists the assets selected for use in specific projects. Used by producers, maintainers, and project leads to assess the potential impact of changes to an asset
- **Asset Ratings**
  - Shows consumer ratings for assets. Architects and registrars may use the report to chart the perceived value of assets, while producers and maintainers can use the report as a feedback mechanism.
- **Asset Rejections**
  - Lists the reasons an asset was rejected for use in a project. Architects and registrars may use this report to gauge the level of demand for specific assets, while producers and

maintainers can use the report as a feedback mechanism.

- **Consumer Reported Asset Value (by Asset)**
  - Indicates the consumer reported savings associated with an asset, along with the predicted value of the assets. Managers may use this report to refine the numbers used to calculate predicted net hours. Architects and registrars may use this report to identify the most used and valuable assets in the registry. Producers and maintainers may use this report to determine actual asset value as realized by consumers, as well as identifying ongoing changes and enhancements to assets in the registry.
- **Subscribers to Asset Notifications**
  - Shows specific subscribers to asset information. This report may be used by architects and registrars to determine the level of demand on assets in the portfolio.

## Performance Reports

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

- **Asset Use by Project Within a Department**
  - Shows the amount of asset use in each project within a department. The report shows the consumer name, project, asset type, and other groups of information used to identify departments that reuse assets. This report may be used by management to reward asset reuse by groups and individuals.
- **Asset Use (by project)**
  - Shows the assets used in a project, as well as the hours saved by using the asset. Managers can use this report to reward groups or individuals for reusing assets; architects and registrars can use the report to spot emerging standards in a portfolio. Managers can also use this report, with project leads, to quantify value produced for clients.

## Program Management Reports

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

- **Active and Unapproved User Login**
  - Shows the names of active and unapproved users and the number of times that they logged in. The system administrator or security administrator may use this report to reallocate registry licenses.
- **Active and Unapproved Users with Zero Logins**
  - Shows the names of active and unapproved users who have never logged in. The system administrator or security administrator may use this report to reallocate registry licenses.

- **Asset Portfolio Valuation**
  - Shows the number of assets used, how frequently each asset was used and the total savings in reuse time. Architects and registrars may use the report to find the most valuable and valued assets.
  
- **Asset Use by Project Within a Department**
  - Shows the amount of asset use in each project within a department. The report shows the consumer name, project, asset type, and other groups of information used to identify departments that reuse assets. This report may be used by management to reward asset reuse by groups and individuals.
  
- **Consumer Reported Asset Value (by Asset)**
  - Shows the consumer-reported savings associated with an asset, along with the predicted value of the assets. Managers may use this report to refine the numbers used to calculate predicted net hours. Architects and registrars may use this report to identify the most used and valuable assets in the registry. Producers and maintainers may use this report to determine actual asset value as realized by consumers, as well as identifying ongoing changes and enhancements to assets in the registry.
  
- **Password Event Log**
  - Shows the password changes made for users. The report may be used by security administrators or system administrators to identify security breaches.
  
- **Submission Status (by Producer)**
  - Shows the names of producers, the number of assets submitted and registered, number of use instances, and the estimated time saved by asset consumers.
  
- **Subscribers to Asset Notifications**
  - Shows specific subscribers to asset information. This report may be used by architects and registrars to determine the level of demand on assets in the portfolio.

## Running a Report

This procedure is performed on the Reports page.

1. Select the report from the list in the sidebar.

The report form opens in the main pane.

2. Select the appropriate **Date Range** in the drop-down.
3. If necessary, click the ... button to launch the calendar to select **From** and **To** dates.
4. Select the **Sort Order**.

**Note:** Sort order selections vary according to the type of report.)

5. Select the **Output Format**.

**Note:** HTML formatting errors may occur when the amount of data in a report exceeds the capacity of the reporting engine to properly render the HTML.

