BEA AquaLogic Enterprise Repository®

Role-based Access Control Use Cases

Version 3.0
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Contents

Use Case #1: Expose Web Services to Customers and Trading Partners

Benefit

This scenario allows an organization to leverage Web Services to improve business operations between trading partners and allow its customers to connect to systems and gather information, but restricts access to information that might otherwise expose sensitive knowledge of back end systems.

Overview

In this scenario, the organization's trading partners and customers have access only to the appropriate Web Services within AquaLogic Enterprise Repository. Access to other assets is denied. In order to facilitate these measures, the metadata for Web service assets is organized into two general groupings:

- **Unrestricted:**
  - Metadata, associated files, and downloadable files that the organization wants to expose to all internal and external parties.
- **Restricted:**
  - Metadata, design documents, or files that reveal the inner workings of the organization's backend systems. Only internal developers will have access to this information.

The **Custom Access Settings (CAS)** described in this scenario provide all internal developers with access to both the restricted and unrestricted parts of Web services assets, as well as the other assets in the repository. The organization's trading partners and customers have access only to the unrestricted Web Service assets. This scenario necessitates the creation of two different Web Services asset types -- one for unrestricted data and another one for restricted data.

- **Note**
  - This scenario describes a simple way to expose Web Services to customers and trading partners. However, other considerations not addressed by this use case may require additional or alternative measures. For example, it may be more appropriate to establish a separate instance of ALER for external use only. The external instance may be branded differently than the internal instance, and would include only the metadata, associated files, and downloadable files suitable for exposure to external parties. In this case, usage histories and reviews would reflect only the experience of external users. If your situation requires a more complex solution, please contact your AquaLogic Enterprise Repository Implementation Manager or Solutions Consultant for assistance and guidance.

Solution

Prerequisite

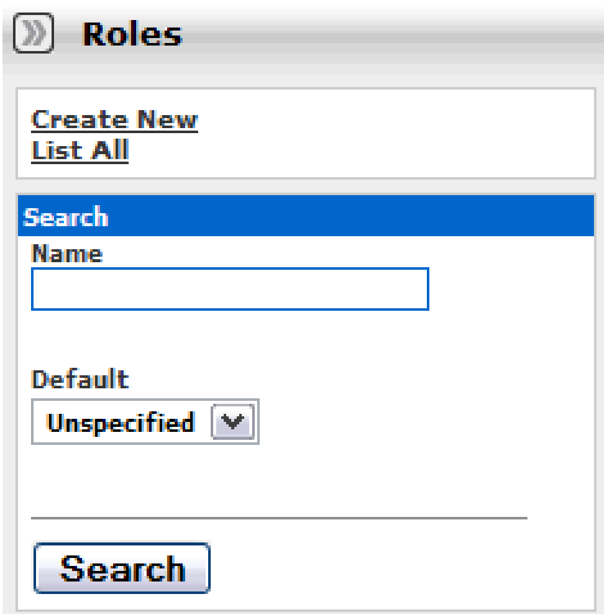
Verify that **Customer** and **Trading Partner** users exist in ALER.

Create and Assign the Roles

This procedure is performed on the AquaLogic Enterprise Repository **Admin** screen.

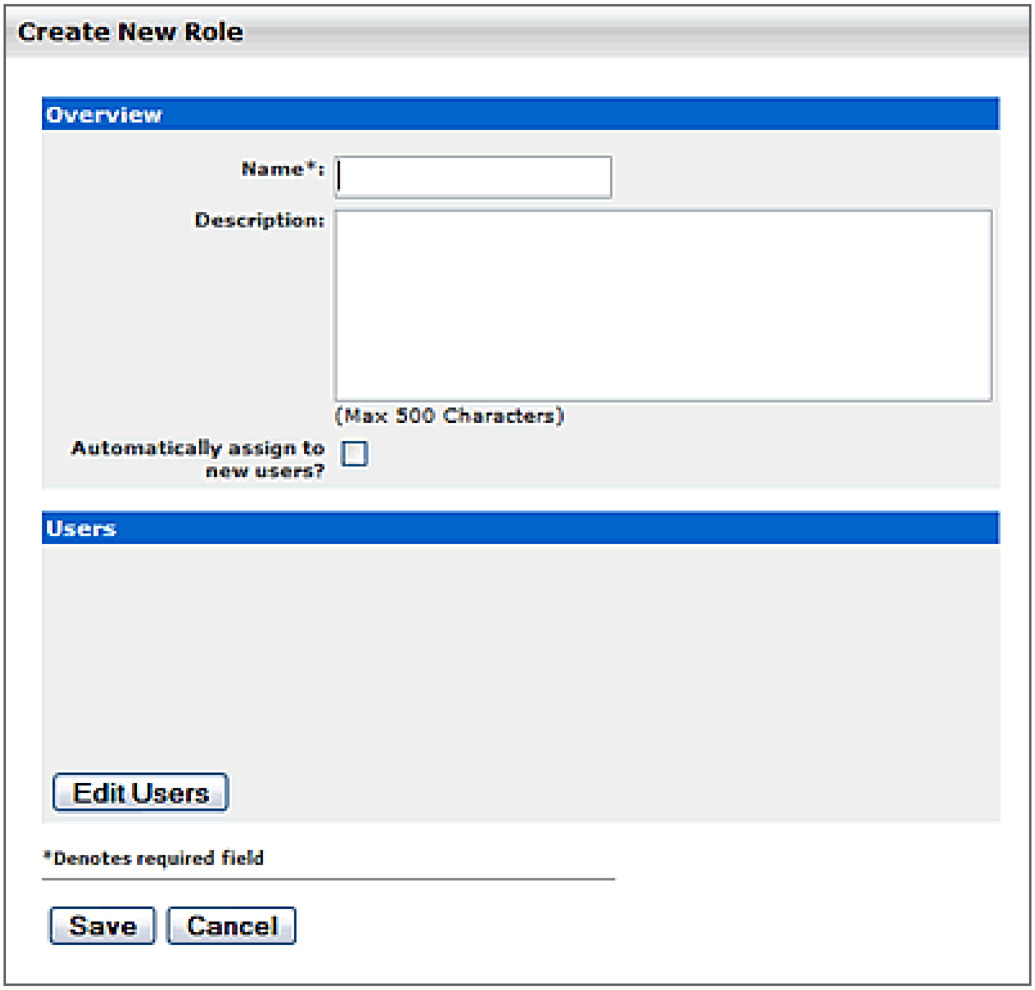
1. Click **Roles**.

   The **Roles** section opens.



2. Click **Create New**

   The **Create New Role** pop-up opens.



3. Enter **User - Customer** in the **Name** text box.

4. Enter **Represents Web Services customers** or some other descriptive text in the **Description** text box.

5. When finished, click **Save**.

   The **Create New Role** pop-up closes.

6. Repeat the above process to create the role **User - Trading Partner**.

7. Assign the new roles to the appropriate users (i.e. user accounts representing the appropriate customers and trading partners).

   - On the **Admin** screen:
     - Click **Roles** to assign user to roles, or...
     - Click **Users** to assign roles to users.

Organize the Metadata

The metadata for Web Service assets must be organized into two general groupings according to the roles that will have ALER access to the information. The first grouping consists of the metadata that can be viewed by everyone (Customers, Trading Partners, and Internal Developers). The second grouping consists of metadata that can be viewed only by Internal Developers.

1. Launch the **Asset Editor**.
2. Click **Manage Types** in the **Actions** menu.

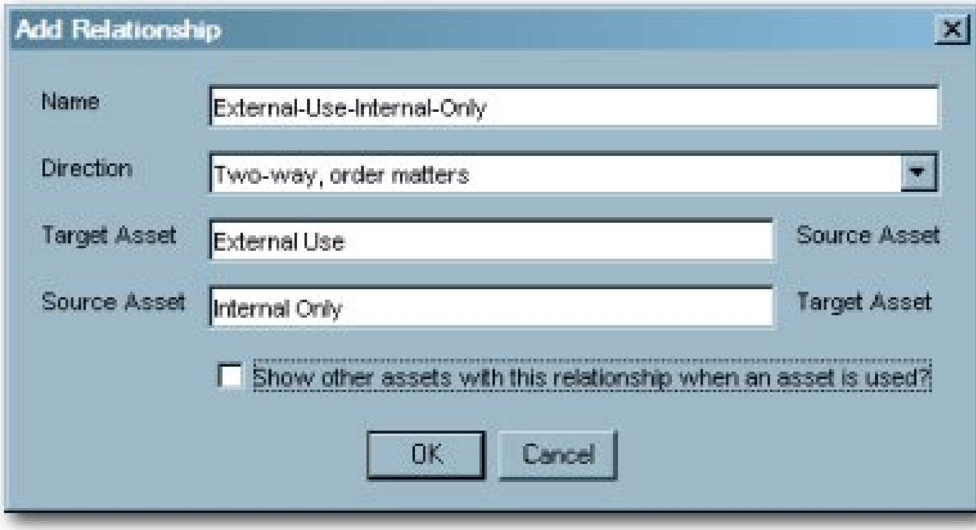
   The **Type Manager** launches.
3. In the **Type Manager**, use the **Service** asset type as a template to create a new asset type called **Service - Internal Only.**
4. When finished, click **Save** in the file menu in the **Type Manager**.
5. Click **Copy/Migrate** in the **File** menu in the **Asset Editor**
6. Copy/migrate all existing Web Service assets to the new **Service - Internal Only** asset type.
7. Edit all original assets of the **Service** asset type to delete all metadata fields that reflect or represent information or metadata that is to be restricted from public view.
8. Delete all non-restricted fields (the first metadata grouping, as mentioned above) from the new **Service - Internal Only** asset type.

Create the Relationships

This procedure is performed in the **Asset Editor**.

1. Click **Configure Relationships** in the **Actions** menu.

   The **Configure Relationships** pop-up opens.
2. Click **Add**.
3. Configure a two-way relationship called **External-Use-Internal-Only**.



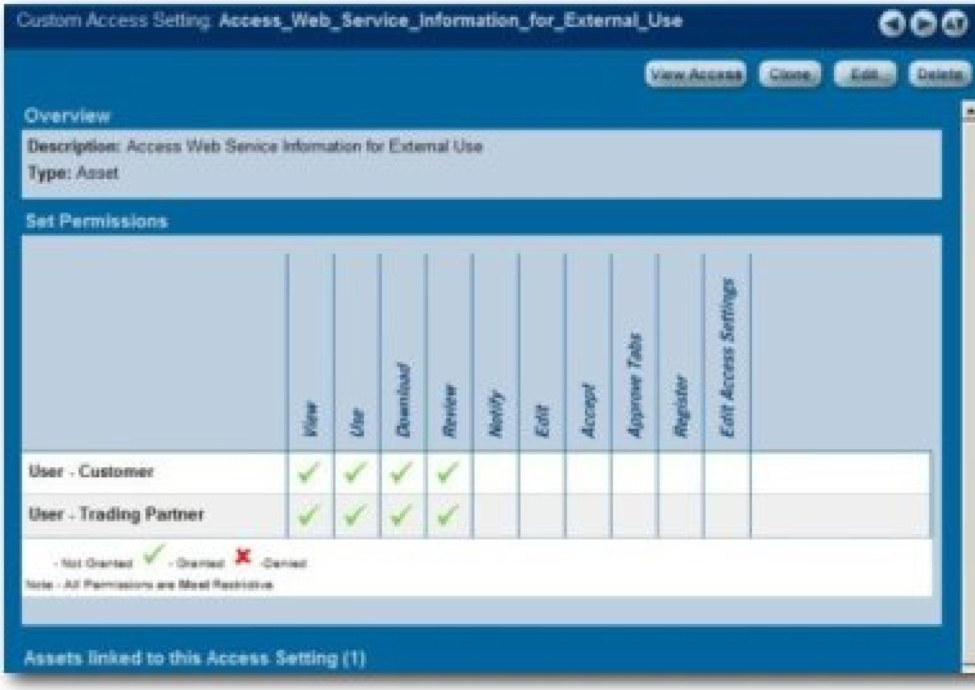
Apply the Relationship

Add the **External-Use-Internal-Only** relationship to the Service assets.

The procedure is performed in the **Asset Editor**.

1. Open one of the Service assets.
2. Click the **Relationship** tab.
3. Apply the **External-Use-Internal-Only** relationship to each Service asset.

   This will allow Internal Users to access the restricted fields.
4. Create a CAS.
   - Click **Custom Access Settings** in the sidebar on the **Admin** screen.
   - Click **Create New**
   - Name the new CAS **Access_Web_Service_Information_for_External_Use**



- Set the following permissions:
    - Role: **User - Customer**
        - Permissions:
            - *View*
                - *Use*
                - *Download*
                - *Review*
    - Role: **User - Trading Partner**
        - Permissions:
            - *View*
            - *Use*
            - *Download*
            - *Review*

5. Launch the **Asset Editor**.

6. Open one of the Web Service assets.

7. Select the **Administration** tab.

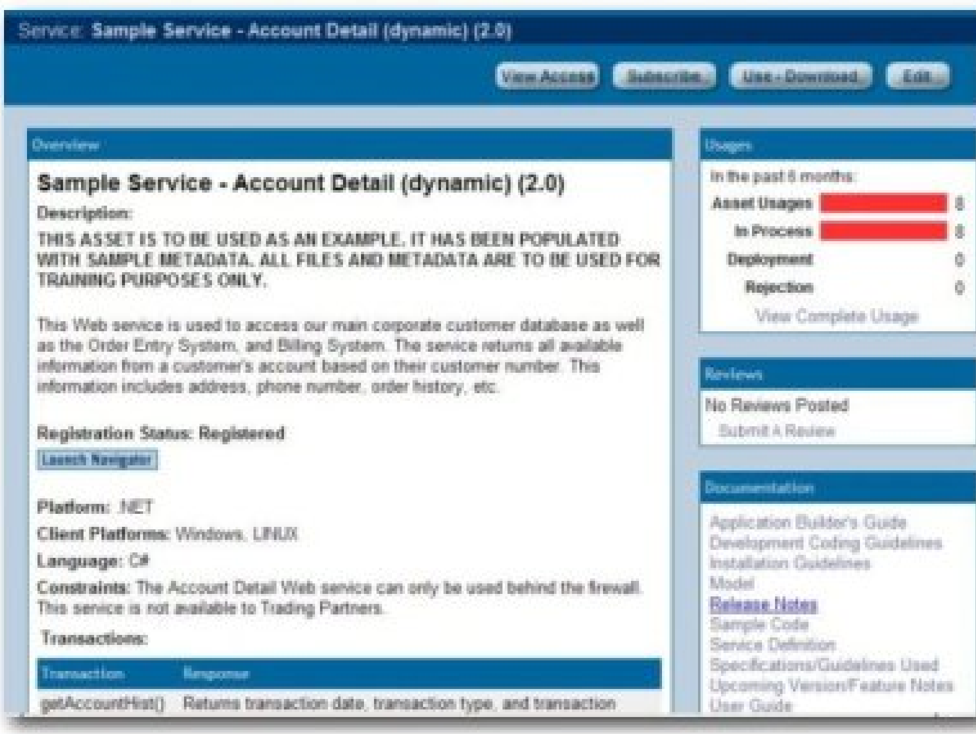
8. Apply the new **Access_Web_Service_Information_for_External_Use** CAS to the Web Service.

   This CAS will work in tandem with the **Basic_Default_Assets** CAS already assigned to each asset.

9. Repeat the process with each of the Web Service assets.

Results

- **Service Asset Type**



- **Service - Internal Only Asset Type**

Note that considerable less information is provided in this view.

Validation Test

Select a user in each of the three designated roles and verify access as described below:

- Roles:
  - **User - Customer**
  - **User - Trading Partner**

- Access:
  - Only the **Assets** and **My Stuff** links are displayed in the AquaLogic Enterprise Repository menu bar.
  - Can see only the Web Service asset metadata intended for external view (**Service** Asset Type).
  - Relationships for these assets are not visible.
  - When using Web Service assets, only the primary downloadable files are be available for download. No related assets are available.
  - On the AquaLogic Enterprise Repository **Assets** screen, the **Submit Assets** and **Edit/Manage Assets** buttons are not displayed.
  - The **Edit** button is not displayed when viewing the asset detail screen for Web Service assets.

- Role:
  - **User** (internal employees):

- Access:
  - Can see Web Service metadata intended for internal and external view (**Service** assets and **Service - Internal Only** assets).
  - Can see all relationships on **Service** assets.
  - If the **Use/Download** button is clicked when viewing a **Service -Internal Only** asset, files

intended for external view are displayed as related assets in the download window. Both internal and external files are available for simultaneous download.

Use Case #2: Manage Intellectual Property in a Global Economy

Benefit

The settings described in this scenario allow an organization that is operating in a highly distributed global environment to manage and protect intellectual property by limiting the exposure of intellectual property to outsourced development teams. These settings also ensure that assets adhere to the limitations specified under export control regulations.

Overview

Outsourced Development Teams

In this scenario, External Service Providers (ESPs) can view, use, and provide reviews ONLY for the assets specified in their **Project Profile**. During the course of the project, ESPs can also submit assets produced within the project to a technical lead or Project Architect for review, approval, and asset registration. For example, after the design phase of the project, an ESP can submit the design documents for approval by the technical lead or project architect. This scenario presents a project lifecycle governance model and facilitates project milestone reviews.

Export Controls

Export control regulations typically prohibit the export of software and other types of intellectual property to certain countries. In this scenario, assets that are subject to export control are assigned a Custom Access Setting indicating that they are restricted under a specific Export Control Classification Number (ECCN). Restricted individuals are assigned a corresponding Export Control Classification Number (ECCN) role, in addition to the roles granted by virtue of their regular responsibilities as employees. For example, encryption software may not be exported to Iraq, Iran, Libya, North Korea, Sudan, Syria, or Cuba under ECCN 5D002. All encryption software assets in ALER will receive a custom access setting Access_Restricted_by_ECCN_5D002, identifying that they are subject to export control. Individuals from Iraq, Iran, Libya, North Korea, Sudan, Syria, or Cuba will also be assigned the role User - Restricted by ECCN 5D002, indicating that they are restricted from accessing encryption software. As export control limitations change, it is easy to identify the individuals and assets affected in order to modify access settings.

Solution for Outsourced Development Teams

The following procedures are performed on the AquaLogic Enterprise Repository **Admin** screen.

Prerequisite

Verify that External Service Providers have AquaLogic Enterprise Repository user accounts.

Create the Roles

1. Click **Roles**
2. Click **Create New**
3. Create a new role named **User - ESP Project X**

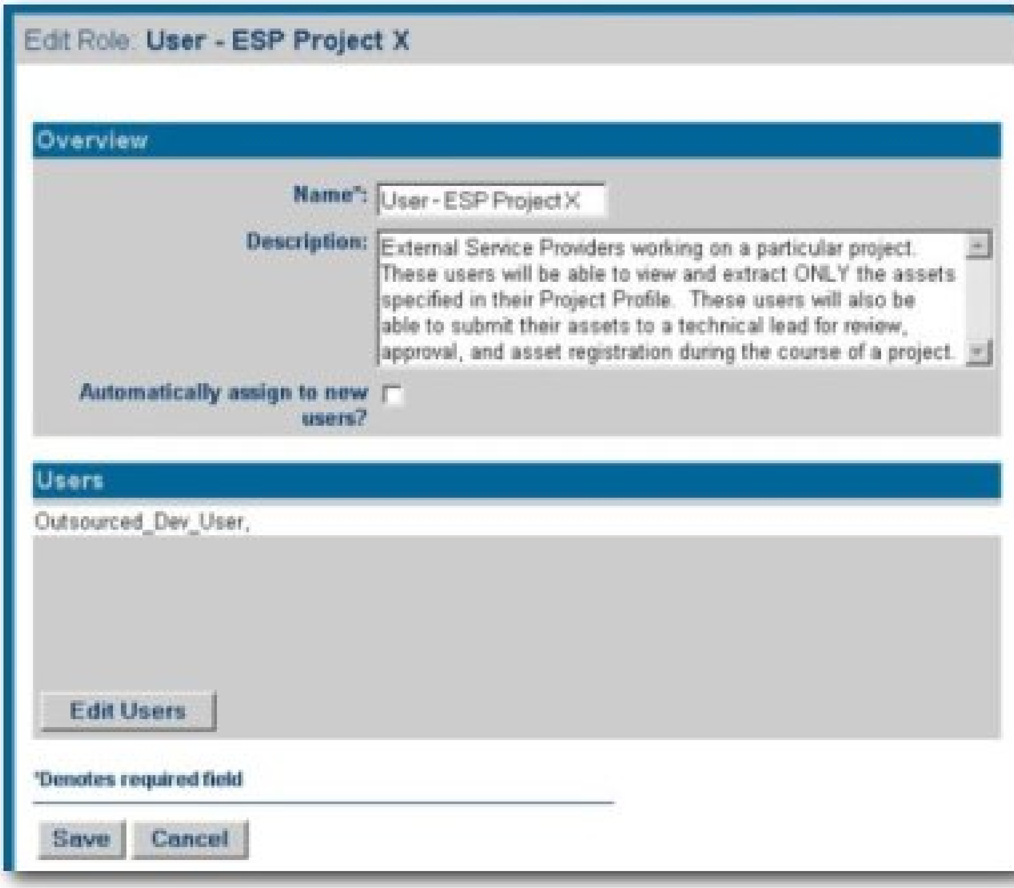
   This role represents External Service Providers working on a particular project. Users in this role can view and download ONLY the assets specified in their Project Profile. They can also submit their assets to a technical lead for review, approval, and asset registration during the course of a project.

Assign the Roles

Assign the **User - ESP Project X** role and the **1: Create/Submit** roles to the appropriate users.

- The **1: Create/Submit** role allows ESPs to submit assets they produce on the project to a technical lead or Project Architect for review, approval, and asset registration during the course of the project.

1. Click **Roles** to assign users to roles



or...

Click **Users** to assign roles to users

Create the Custom Access Setting

1. Click **Custom Access Settings**.

2. Click **Create New**

3. Create a new CAS named **Access_Project_X_Assets.**

   This CAS provides access to assets specified for use on Project X.

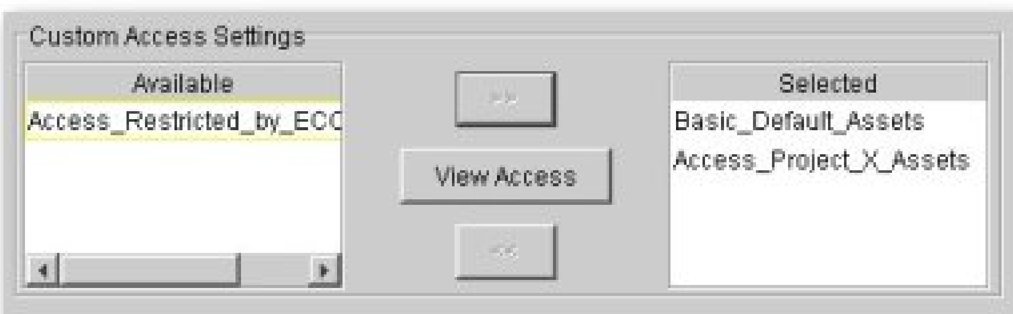
4. Set the following permissions:

   - Role: **User - ESP Project X**

   - Permissions:
     - *View*
     - *Use*
     - *Download*
     - *Review*

5. Identify the assets specified for use on Project X through the Project Profile.

6. Add the **Access_Project_X_Assets** CAS to the Project Profile for Project X, and to each asset specified in the Project Profile for Project X.



Validation Test

Verify that the following conditions for External Service Providers assigned to Project X:

- Role:
  - **Outsourced_Dev_User**:
- Access:
  - Can see the **Project Profile** for **Project X**.
  - Can see only those assets that have been specified in the **Project Profile** for **Project X**.
  - Can download the assets specified in the **Project Profile** for **Project X**.
  - The **Submit Assets** link is visible on the **Assets** screen.

- On the asset detail display, the **Subscribe** and **Use/Download** buttons are visible; the **Edit** button is hidden.
- Only the Assets and My Stuff tabs are visible in BEA AquaLogic Enterprise Repository.

Solution for Export Controls

The following procedures are performed on the AquaLogic Enterprise Repository **Admin** screen.

Prerequisite

Verify that individuals restricted under export controls have BEA AquaLogic Enterprise Repository user accounts.

Create the Role

1. Click **Roles**
2. Click **Create New**
3. Create a role named **User - Restricted by ECCN 5D002**

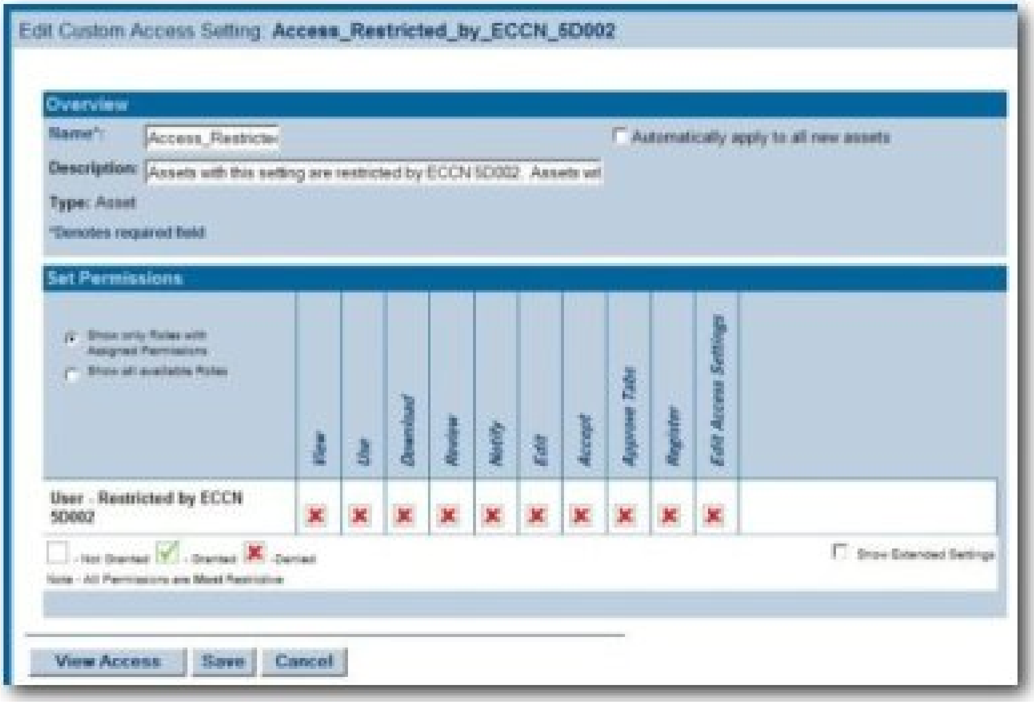
   This role will be assigned to individuals from Iraq, Iran, Libya, North Korea, Sudan, Syria, or Cuba -- any user who is to be restricted from accessing encryption software or software limited for export under ECCN 5D002.
4. Assign the new **User - Restricted by ECCN 5D002** role to the appropriate users.

Create the Custom Access Setting

1. Click **Custom Access Settings**
2. Click **Create New**
3. Create a new CAS named **Access_Restricted_by_ECCN_5D002**

   This CAS restricts access to the assets specified as limited for export under ECCN 5D002.

4. Set the following permissions:
   - Role: **User - Restricted by ECCN 5D002**
   - Permissions: DENY access to:
     - *View*
     - *Use*
     - *Download*
     - *Review*
     - *Accept*
     - *Approve Tabs*
     - *Register*
     - *Edit Access Settings*



5. Add the **Access_Restricted_by_ECCN_5D002** CAS to all encryption software assets or assets restricted by export control under ECCN 5D002.

Validation Test

Verify that the individuals restricted by export control limitations:

- Cannot see the assets restricted by export control limitations.
- Can see all assets not restricted under export control limitations.

Use Case #3: Establish a Federated Repository

Benefit

The settings described in this scenario allow ALER users to view and access enterprise assets, but limit access to domain specific information to those assigned to the relevant domains. This allows a large organization to target specific asset consumer groups in order to provide them with the most relevant assets for their needs.

Overview

This scenario involves enterprise-wide assets that may be viewed and downloaded by anyone within the organization, and domain-specific assets that are relevant only to development teams within specific business domains. Producers of enterprise-wide assets can create, edit, and register their assets, and view and download all domain assets. Producers of domain-specific assets can create, edit, and register assets within their domain. All users within the organization may view and download enterprise-wide assets, in addition to assets that are specific to their domain.

Solution

Prerequisite: Verify that enterprise and domain producers and all consumers have BEA AquaLogic Enterprise Repository user accounts.

Create the Role

1. Click the **Admin** link in the BEA AquaLogic Enterprise Repository menu bar.

2. On the **Admin** screen, click **Roles**

3. Click **Create New**

4. Create the following roles:
    - Role: **Enterprise Producer**
        - Access:
            - Can view, download, edit, and register enterprise assets.
                - Can view and download Domain assets.
    - Role: **Domain X Producer**
        - Access:
            - Can view, download, edit, and register Domain X assets.
                - Can view and download Enterprise assets.
    - Role: **Domain X Consumer**
        - Access:
            - Can view and download Domain X assets and Enterprise assets.
    - Role: **Domain Y Producer**

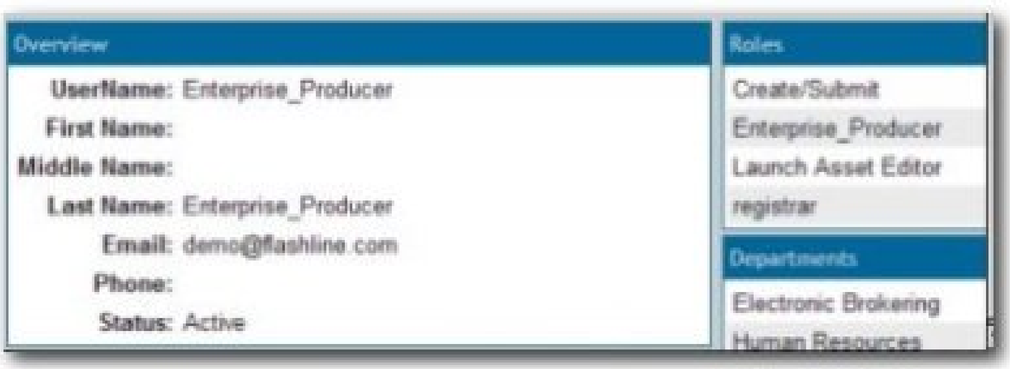
- Access:
    - Can view, download, edit, and register Domain Y assets.
        - Can view and download Enterprise assets.

Create the Custom Access Settings

1. Click the **Admin** link in the BEA AquaLogic Enterprise Repository menu bar.
2. . On the **Admin** screen, click **Custom Access Settings**
3. Click **Create New**
4. Create the following **Custom Access Settings**:
    - CAS: **Access_Enterprise_Assets**
        - Allows any BEA AquaLogic Enterprise Repository user to view enterprise-wide assets.
    - CAS: **Access_Domain_X_Assets**
        - Restricts access to **Domain X assets** to those assigned to the **Enterprise Producer** and/or **Domain X Producer** roles.
    - CAS: **Access_Domain_Y_Assets**
        - Restricts access to **Domain Y assets** to those assigned to the **Enterprise Producer** and/or **Domain Y Producer** roles.

For each **Domain** or **Enterprise** asset, remove the **Basic Default Assets** access setting and replace it with the appropriate **Custom Access Setting**, as noted in Step 4, above.

- **Roles assigned to Enterprise_Producer**



- **Corresponding CAS**

Set Permissions

	View	Use	Download	Review	Notify	Edit	Accept	Approve Tabs	Register	Edit Access Settings
Domain X Consumer	✓	✓	✓							
Domain X Producer	✓	✓	✓							
Domain Y Producer	✓	✓	✓							
Enterprise_Producer	✓	✓	✓	✓		✓	✓	✓	✓	✓

- **Role assigned to Domain_X_Producrs**

- **Role assigned to Domain_X_Consumers**

- **Corresponding CAS**

Set Permissions

	View	Use	Download	Review	Notify	Edit	Accept	Approve Tabs	Register	Edit Access Settings
Domain X Consumer	✓	✓	✓							
Domain X Producer	✓	✓	✓	✓		✓	✓	✓	✓	✓
Enterprise_Producer	✓	✓	✓							

- **Roles assigned to Domain_Y_Producers**

Overview

UserName:	Domain_Y_Producer
First Name:	
Middle Name:	
Last Name:	Domain_Y_Producer
Email:	demo@flashline.com
Phone:	
Status:	Active

Roles

Create/Submit
Domain Y Producer
Launch Asset Editor
registrar

Departments

Electronic Brokering
Human Resources

- **Corresponding CAS**

Set Permissions

	View	Use	Download	Review	Notify	Edit	Accept	Approve Tabs	Register	Edit Access Settings
Domain Y Producer	✓	✓	✓	✓		✓	✓	✓	✓	✓
Enterprise_Producer	✓	✓	✓							

5. For each **Enterprise** or Domain asset, remove the **Basic_Default_Assets** setting and replace it with the appropriate **Access_Enterprise_Assets**, **Access_Domain_X_Assets**, or **Access_Domain_Y_Assets** CAS.

Validation Test

Verify the following conditions for each user/role:

- **Enterprise Producer**:
  - Metadata for individual **Enterprise**, **Domain X**, and **Domain Y** assets is visible on BEA AquaLogic Enterprise Repository's **Assets** screen.
  - Only **Enterprise** assets are visible in the **Asset Editor** (no **Asset Editor** access to **Domain X** or **Domain Y** assets).
  - The **Subscribe**, **Use/Download**, and **Edit** buttons are visible when viewing the metadata for **Enterprise** assets.
  - Can edit and register **Enterprise** assets in the **Asset Editor**.
  - The **Use/Download** buttons are visible in the metadata display for both **Domain X** and **Domain Y** assets. However, the **Edit** button is NOT visible.

- **Domain X Producer**:
  - Metadata for individual **Enterprise** and **Domain X** assets is visible on BEA AquaLogic Enterprise Repository's **Assets** screen; **Domain Y** assets are not visible.
  - **Domain X** assets are visible in the **Asset Editor** (no **Asset Editor** access to **Domain Y** or **Enterprise** assets).
  - The **Subscribe** and **Use/Download** buttons are available when viewing the metadata for **Enterprise** assets. However, the **Edit** button is not available.
  - Can download files from **Enterprise** assets.
  - The **Subscribe**, **Use/Download**, and **Edit** buttons are visible in the metadata display for **Domain X** assets.
  - Can edit and register **Domain X** assets in the **Asset Editor**.

- **Domain X Consumer**:
  - Metadata for individual **Enterprise** and **Domain X** assets is visible on BEA AquaLogic Enterprise Repository's **Assets** screen.; **Domain Y** assets are not visible.
  - The **Subscribe** and **Use/Download** buttons are available when viewing the metadata for **Enterprise** and **Domain X** assets. However, in both cases the **Edit** button is not available.
  - Can download files from **Enterprise** and **Domain X** assets.
  - The **Subscribe** and **Use/Download** buttons are available when viewing the metadata for Domain X assets. However, the **Edit**

- **Domain Y Producer**:
  - Metadata for individual **Enterprise** and **Domain Y** assets is visible on BEA AquaLogic Enterprise Repository's **Assets** screen; **Domain X** assets are not visible.
  - **Domain Y** assets are visible in the **Asset Editor**. However, there is no **Asset Editor** access **Domain X** and **Enterprise** assets.

- The **Subscribe** and **Use/Download** buttons are available when viewing the metadata for **Enterprise** and **Domain Y** assets. However, in both cases the **Edit** button is not available.
- Can download files from **Enterprise** and **Domain Y** assets.

Use Case #4: Manage the Asset Lifecycle

Benefit

The settings described in this scenario allow an organization to manage assets throughout their lifecycle, from initial conception through retirement. These settings provide limited access to assets under development (assets in progress) and to retired assets. This helps to eliminate redundant development efforts by exposing assets still in development to all development teams. Development teams in need of such an asset can plan to include it in their projects, and can collaborate with the asset production team during asset development. Other settings limit the distribution of retired assets, which helps to maintain control over deployed assets.

Overview

*(Note: This use case takes place against a backdrop of policies and procedures for **Asset Release Management**, which is focused on managing the lifecycle of assets and the artifacts that make up the assets. As part of Asset Release Management, the artifacts that make up an asset are produced by projects whose end result can be anything from the asset itself, to an entire product or system. These artifacts are harvested, along with supporting artifacts and other information, and the aggregate is packaged as an asset. Once verified as complete and correct these assets enter the repository where they are available to the entire organization. As registered assets are downloaded from the repository, defects will be identified and enhancements will be requested. New versions of the asset will be created to address these change requests. Eventually, either through disuse or replacement by another version, an asset will be retired. Retired assets are unavailable for use.)*

The AquaLogic Enterprise Repository can be used to manage access to an asset throughout its entire lifecycle, from inception through retirement. This use case focuses primarily on using Advanced RBAC to expose and to provide access to assets to different stakeholder groups throughout the asset lifecycle.

Asset Lifecycle Stages

- **Requirements Gathering**
  - The organization has identified the need by several upcoming projects for a particular asset. The Production Team creates a proposed **asset in progress**. The metadata for this asset includes a brief description of the asset and its purpose, and is open for review and comment by a set of Subject Matter Experts associated with the relevant projects. The repository display of the asset includes a link to a dedicated virtual forum, which is used to gather functional requirements from members of the upcoming projects. The asset is visible only to those producing the asset as well as to the Subject Matter Experts on the relevant projects -- at least until the proposed asset is approved and moves to the next stage in the lifecycle, when it is visible to a wider audience.

Note: Requires the Assets in Progress option for AquaLogic Enterprise Repository.

- **Design and Development**
  - Once the requirements are gathered and funding for the development of the asset is approved, the producers begin generating the supporting artifacts (such as design documents and code) and associating them with the asset in the repository. At this point, only the asset's producers can add artifacts and metadata to the asset and download the asset's code. However, the asset is visible to a broader community of developers in order to allow interested parties to track its progress.
- **Beta Release**
  - After the code has been tested it is made available as a beta release to the Subject Matter Experts representing the upcoming projects that expect to use the asset.
- **Release**
  - Once the asset has been thoroughly tested and documented, it is made available to the entire user community.
- **Scheduled for Retirement**
  - Once the asset has outlived its usefulness, it is scheduled for retirement. Its repository status is changed to inactive. Inactive assets remain in the repository, but access to inactive assets is limited to metadata - the asset cannot be used, and none of its files are available for download. These restrictions provide an incentive for projects to migrate to the latest version of the asset. Those responsible for managing the asset retain access to view and edit the asset until it is retired.
- **Retired**
  - Once all projects have migrated to the new version of the asset, the repository status of the original asset is changed to retired. The asset is visible only to repository users (regardless of role) if it is related to another asset in the repository. Users may view the asset metadata through the relationship link.

This scenario describes only one of several strategies for managing access to assets in progress and retired assets. Please contact BEA for more information on these strategies.

General Configuration

The various Asset Lifecycle Management solutions described in this section require the configuration of the following roles and access settings.

(Prerequisite: Verify that the asset production teams and subject matter experts are users within the AquaLogic Enterprise Repository)

Create the Roles

1. Click the **Admin** link in the AquaLogic Enterprise Repository menu bar.

2. On the **Admin** screen, click **Roles**

3. Click **Create New**

4. Create the following roles
   - **User - Production Team Project X**
   - User - Subject Matter Experts Project X

Create the Custom Access Settings

1. Click the **Admin** link in the AquaLogic Enterprise Repository menu bar.

2. On the **Admin** screen, click **Custom Access Settings**

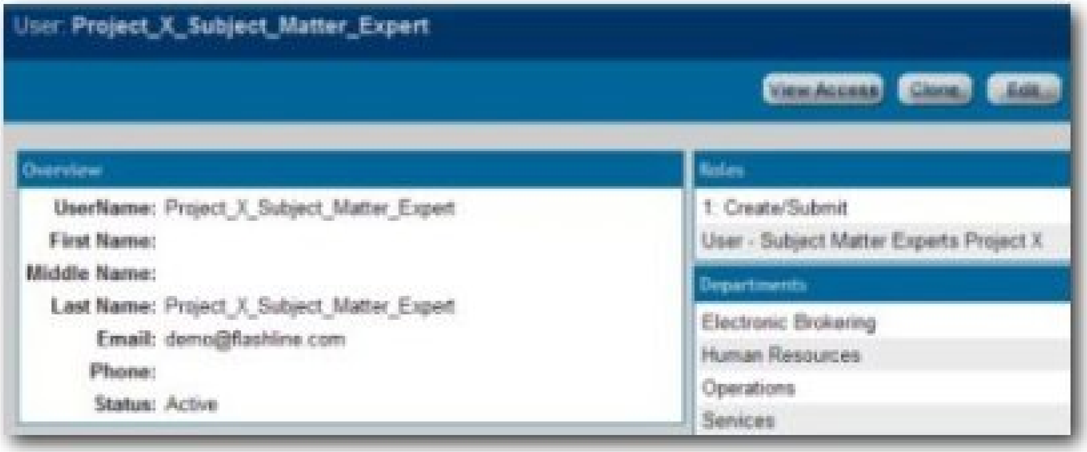
3. Click **Create New**

4. Create the following **Custom Access Settings**:
   - CAS: **Access_Project_X_Assets_Propose**
   - CAS: **Access_Project_X_Assets_Plan**
   - CAS: **Access_Project_X_Assets_Build**
   - CAS: **Access_Project_X_Assets_Release**

The images below illustrate the detail for each role, along with the corresponding **Custom Access Settings**.

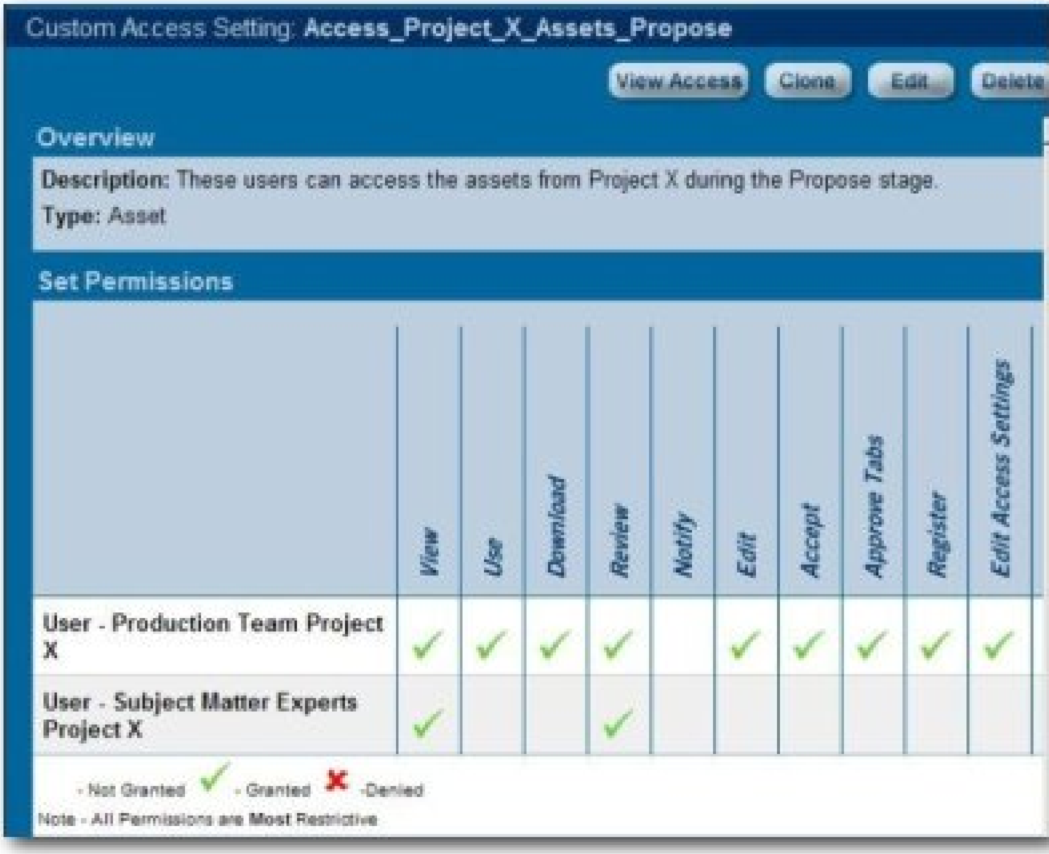
- **Project_X_Producer: Roles**

- **Project_X_Subject_Matter_Expert: Roles**

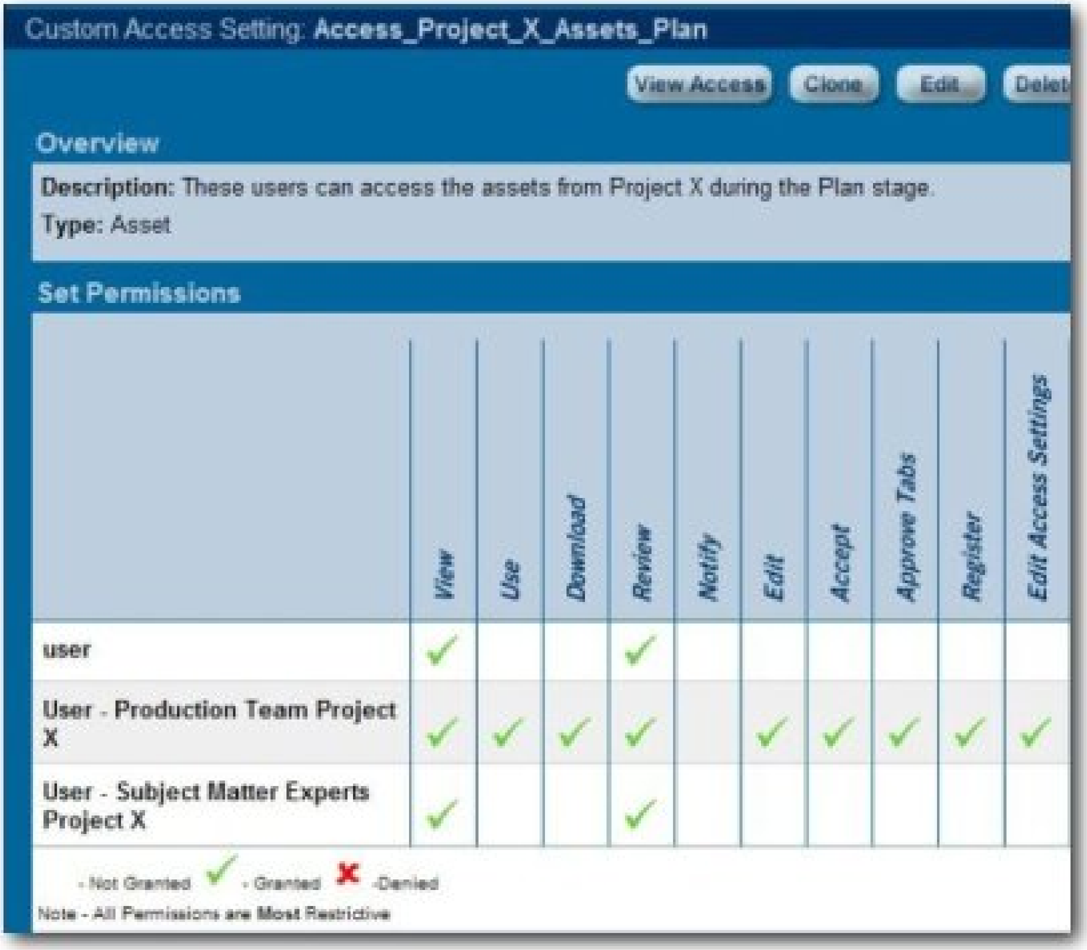


- **User_Community: Roles**

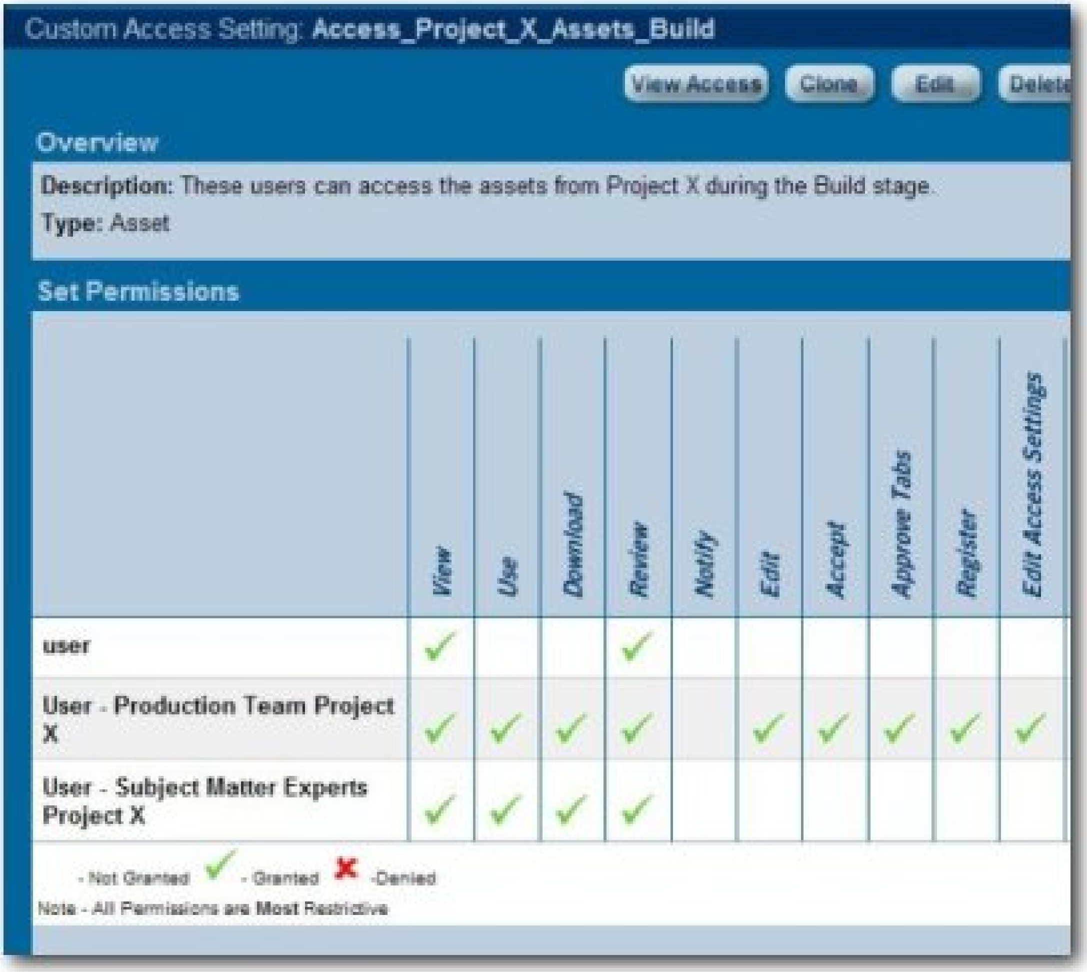
- **Asset Lifecycle Stage - Propose**
  - **CAS: Access_Project_X_Assets_Propose**



- **Asset Lifecycle Stage - Plan**
  - **CAS: Access_Project_X_Assets_Plan**

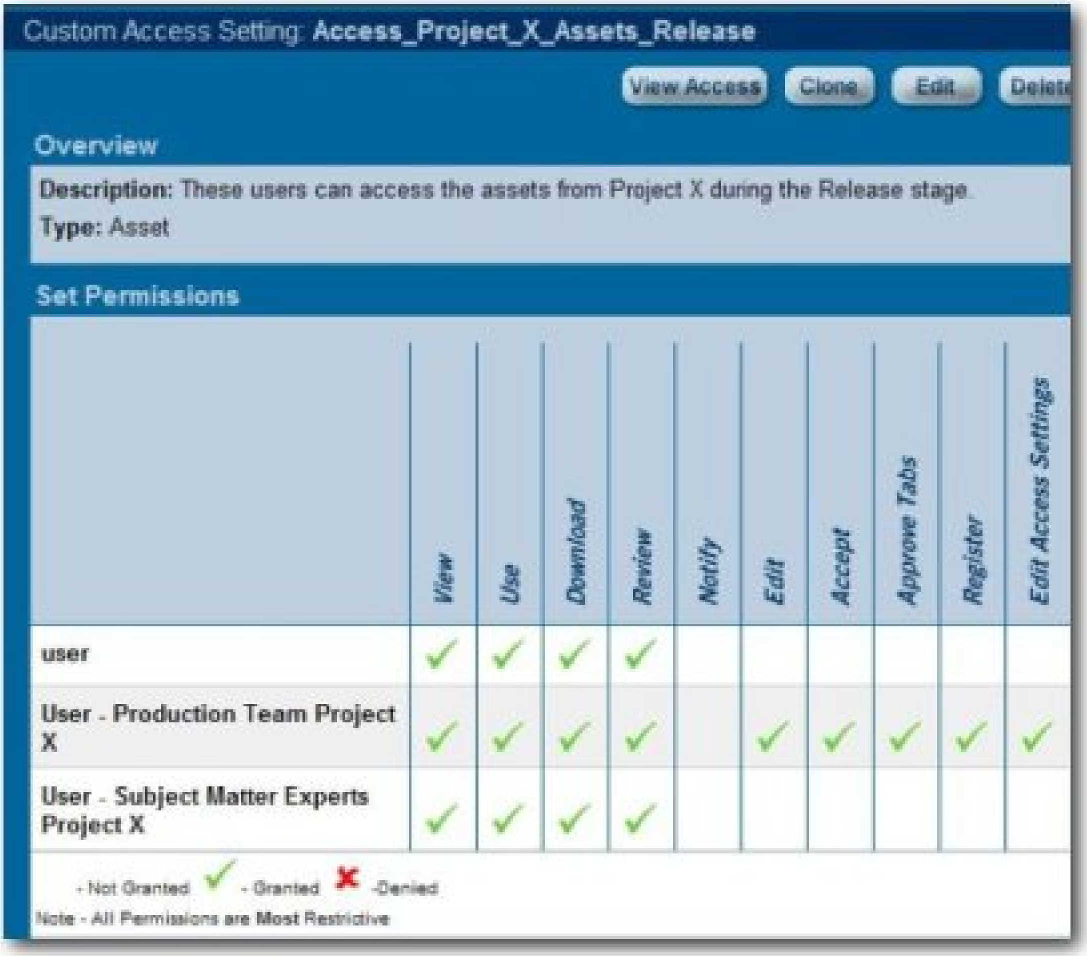


- **Asset Lifecycle Stage - Build**
  - **CAS: Access_Project_X_Assets_Build**



	View	Use	Download	Review	Notify	Edit	Accept	Approve Tabs	Register	Edit Access Settings
user	✓			✓						
User - Production Team Project X	✓	✓	✓	✓		✓	✓	✓	✓	✓
User - Subject Matter Experts Project X	✓	✓	✓	✓						

- **Asset Lifecycle Stage - Release**
  - **CAS: Access_Project_X_Assets_Release**



Configuring the Use Case Solutions

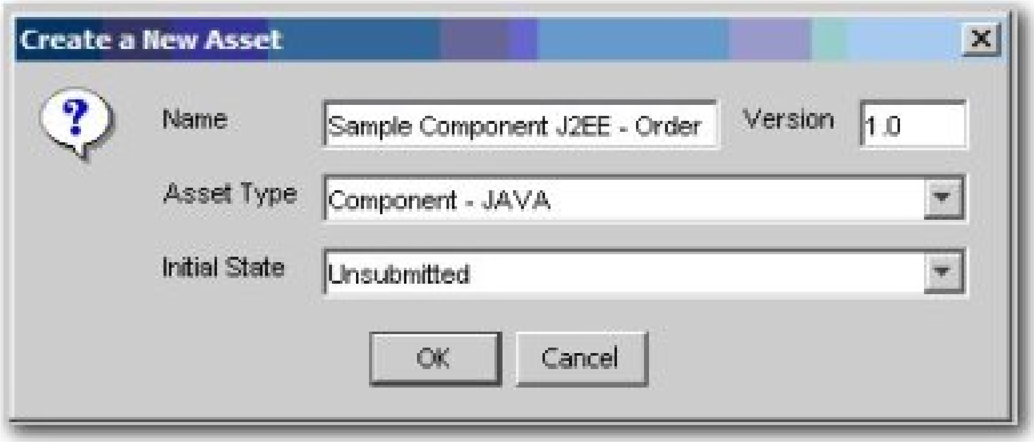
The following section outlines the necessary steps for each phase of the **Asset Lifecycle Management** use case.

Requirements Gathering Stage Solution

(Prerequisite: Verify that the **Asset Lifecycle Categorization** taxonomy is included as part of your selected asset type.)

1. Click the **Assets** link in the AquaLogic Enterprise Repository menu bar.
2. Click **Edit/Manage Assets** to launch the **Asset Editor**
3. Open the **File** menu in the **Asset Editor**
4. Click **New**

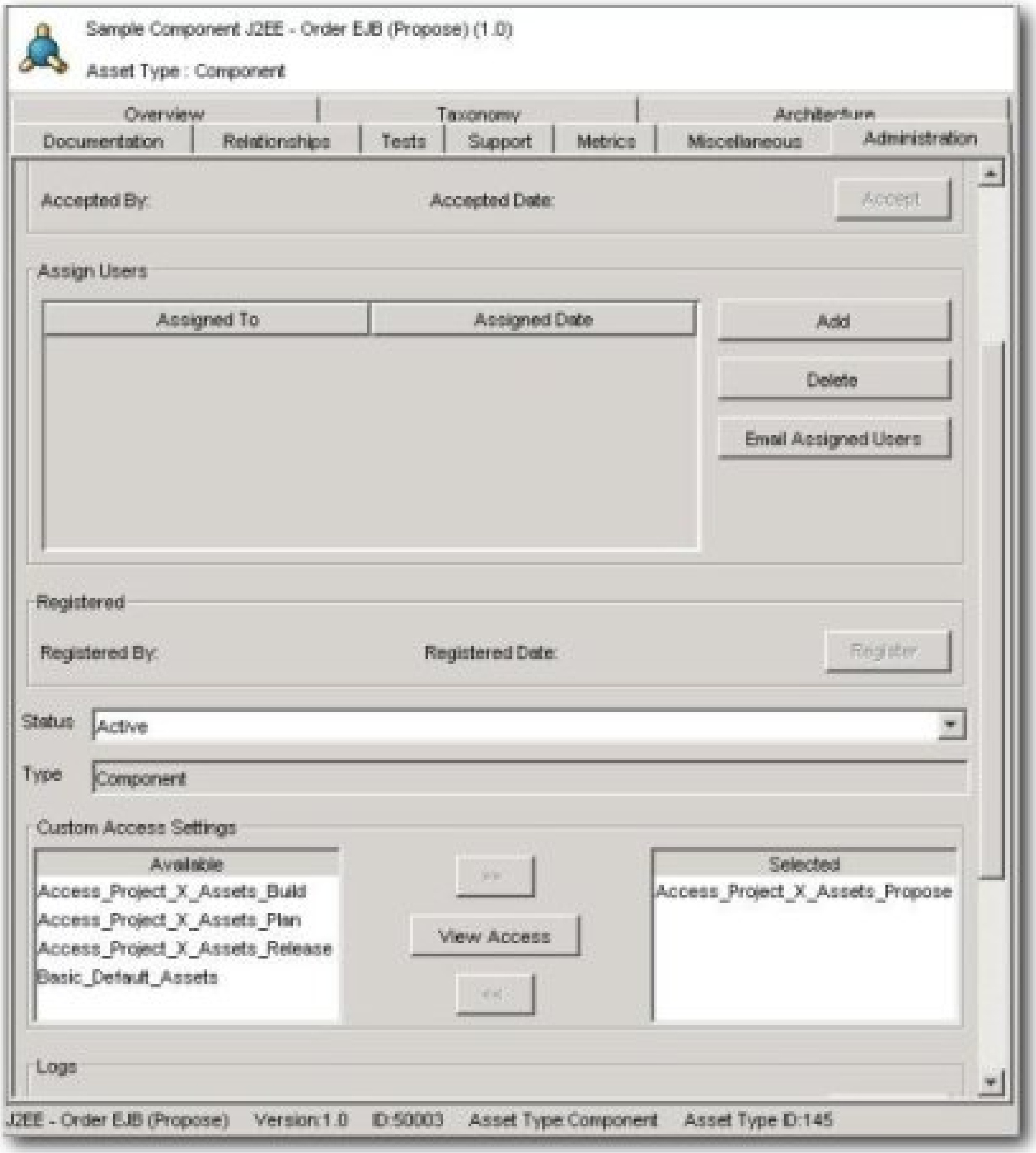
5. Create an asset with the initial state of **Unsubmitted**



6. On the new asset's **Taxonomy** tab in the **Asset Editor**, find the **Asset Lifecycle Stages** categorization

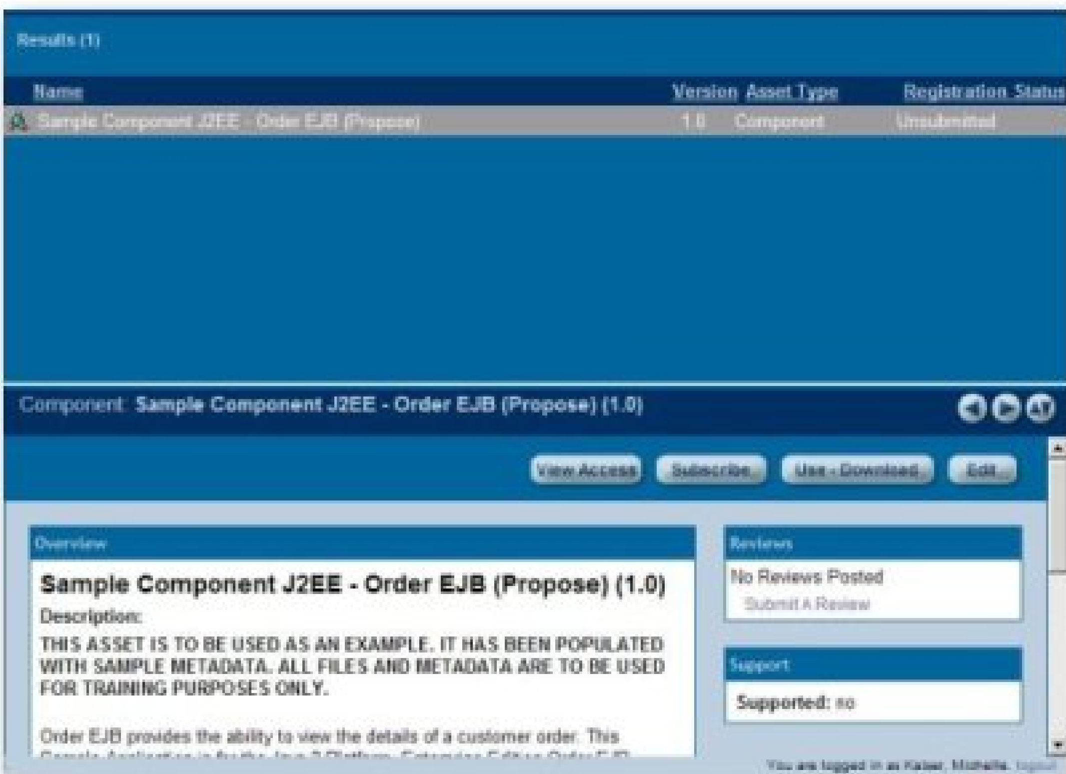
7. Select **Stage 1 - Propose**.

8. On the asset's **Administration** tab, add the new **Access_Project_X_Assets_Propose** asset CAS.



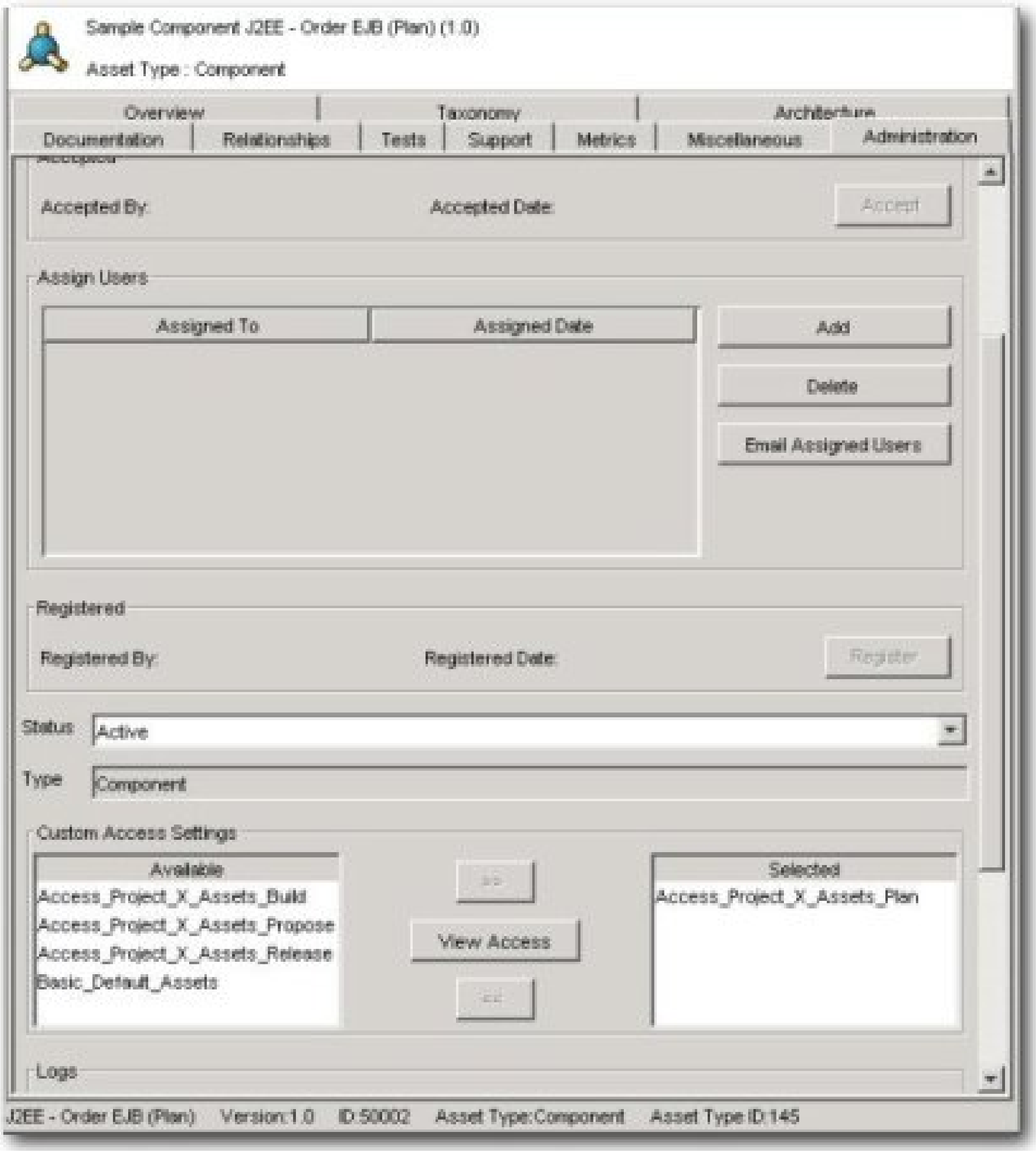
9. Briefly describe the asset and its purpose in the appropriate text boxes on the asset's **General** tab in the **Asset Editor**, and add a forum for use in gathering the asset's functional requirements. (Instructions for adding a forum are included in the **Jive Forum Installation and Configuration Guide**.)

10. View the asset in the **Asset Lifecycle Stages** categorization in AquaLogic Enterprise Repository, in the **Stage 1 - Propose folder**.



Design and Development Stage Solution

1. In the **Asset Editor**, this asset remains in the **Unsubmitted** state.
2. Choose **Stage 2 - Plan** under the **Asset Lifecycle Stages** categorization.
3. Remove the **Access_Project_X_Assets_Propose** asset CAS and add the **Access_Project_X_Assets_Plan** asset CAS.



Beta Release Stage Solution

1. In the **Asset Editor**, this asset remains in the **Unsubmitted** state.
2. Choose **Stage 3 - Build** under the **Asset Lifecycle Stages** categorization.

3. Remove the **Access_Project_X_Assets_Plan** asset CAS and add the **Access_Project_X_Assets_Build** asset CAS to the asset.

Release Stage Solution

1. In the **Asset Editor**, submit the asset. When accepted and registered by the Registrar, the asset's status changes from **Unsubmitted** to **Registered**.
2. Choose **Stage 4 - Release** under the **Asset Lifecycle Stages** categorization.
3. Remove the **Access_Project_X_Assets_Build** asset CAS and add the **Access_Project_X_Assets_Release** asset CAS to the asset.

Scheduled for Retirement Stage Solution

1. In the **Asset Editor**, change the status of the asset from **Active** to **Inactive**.

Retired Stage Solution

1. In the **Asset Editor**, change the status of the asset from **Inactive** to **Retired**.

Asset Lifecycle Management Solution Validation Tests

Confirm the following conditions for each role, as indicated:

- Role:
  - **Project_X_Producer**
- Access:
  - Has **Registrar** permissions throughout the lifecycle of the asset
  - Can view the asset in AquaLogic Enterprise Repository
  - The **Use/Download** and **Edit** buttons are visible
  - Can accept, approve tabs, register, and edit access settings for the asset in the **Asset Editor**.
  - In the **Retired** phase, the asset does not appear in the repository list of assets or searches. Repository access to the asset is possible for this role only when the asset is related to another asset, via the **Relationship** link. However, the asset remains accessible in the **Asset Editor**.

- Role:

- **Project_X_Subject_Matter_Expert**

- Access:
  - In the **Requirements Gathering** phase:
    - Can view the asset, submit reviews, and subscribe to the asset (via the **Subscribe** button)
      - Has access to the asset's forum and may contribute comments

  - In the **Design and Development** phase:
    - Can view the asset, submit reviews, and subscribe to the asset (via the **Subscribe** button)
      - Has access to the asset's forum and may contribute comments

  - In the **Beta Release** phase:
    - Can view the asset, submit reviews, subscribe to the asset (via the **Subscribe** button)
      - Can download the asset (via the **Use/Download** button)
      - Has access to the asset's forum and may contribute comments

  - In the **Release** phase:
    - Can view the asset, submit reviews, subscribe to the asset (via the Subscribe button)
      - Can download the asset (via the Use/Download button)
      - Has access to the asset's forum and may contribute comments

  - In the **Scheduled for Retirement** phase:
    - Can view the asset, submit reviews, and subscribe to the asset (via the Subscribe button)
      - Has access to the asset's forum and may contribute comments

  - In the **Retired** phase, the asset **does not** appear in the repository list of assets or searches. Repository access to the asset is possible only when the asset is related to another asset, via the Relationship link. The asset will display the same functions/ permissions as are listed in the **Scheduled for Retirement** phase.

- Role:
  - **User_Community**
- Access:
  - In the **Requirements Gathering** phase:
    - Has no access to the asset.

  - In the **Design and Development** phase:
    - Can view the asset, submit reviews, and subscribe to the asset (via the **Subscribe** button)
      - Has access to the asset's forum and may contribute comments.

  - In the **Beta Release** phase, can view the asset, submit reviews, and subscribe to the asset (via the **Subscribe** button)
    - Has access to the asset's forum and may contribute comments.
    - In the Release phase, can view the asset, submit reviews, subscribe to the asset (via the Subscribe button), and download the asset (via the Use/Download button). Also has access to the asset's forum and may contribute comments.

  - In the **Scheduled for Retirement** phase, can view the asset, submit reviews, and subscribe to the asset (via the **Subscribe** button)
  - Has access to the asset's forum and may contribute comments.

- In the **Retired** phase:
  - The asset **does not** appear in the repository list of assets or searches. Repository access to the asset is possible only when the asset is related to another asset, via the **Relationship** link. The asset will display the same functions/permissions as are listed in the **Scheduled for Retirement** phase.

Use Case #5: Limit Access to Source Code Files to Asset Production Teams

This use case is somewhat similar to Use Case #1 (Web Services). That use case used two different asset types for each Web service asset in order to manage the presentation and availability of internally-exposed and externally-exposed asset metadata. Use Case # 5 also involves the restriction of access to asset metadata and files, but relies on only one asset type.

Benefit

The settings described in this scenario facilitate black-box reuse by limiting the access of certain users/roles to assets that include compiled code. Such black-box assets are used as-is, without modification to the source code. Black-box assets are high-value assets in that their use in projects generally results in significant maintenance savings.

Overview

In this scenario, developers in specified asset consumer roles are limited to access to compiled code only, while those responsible for the production and maintenance of assets retain access to both source and compiled code.

Solution

Create the Roles

1. Click the **Admin** link in the AquaLogic Enterprise Repository menu bar.
2. On the **Admin** screen, click **Roles**
3. Click **Create New**
4. Create the following roles:
    - **Production Team**
    - **Maintenance Team**
    - **Consumer**

Create the Customer Access Settings

1. Click the **Admin** link in the AquaLogic Enterprise Repository menu bar.

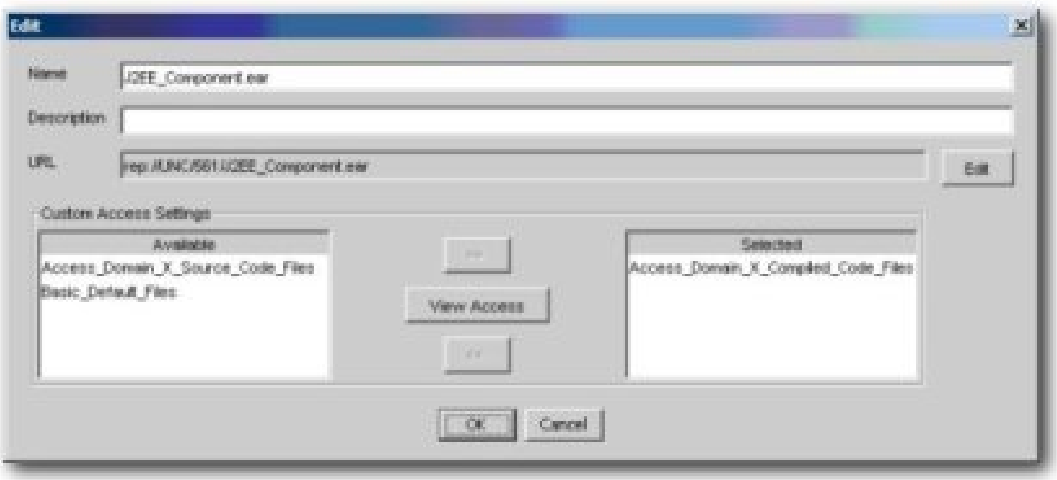
2. On the **Admin** screen, click **Custom Access Settings**

3. Click **Create New**

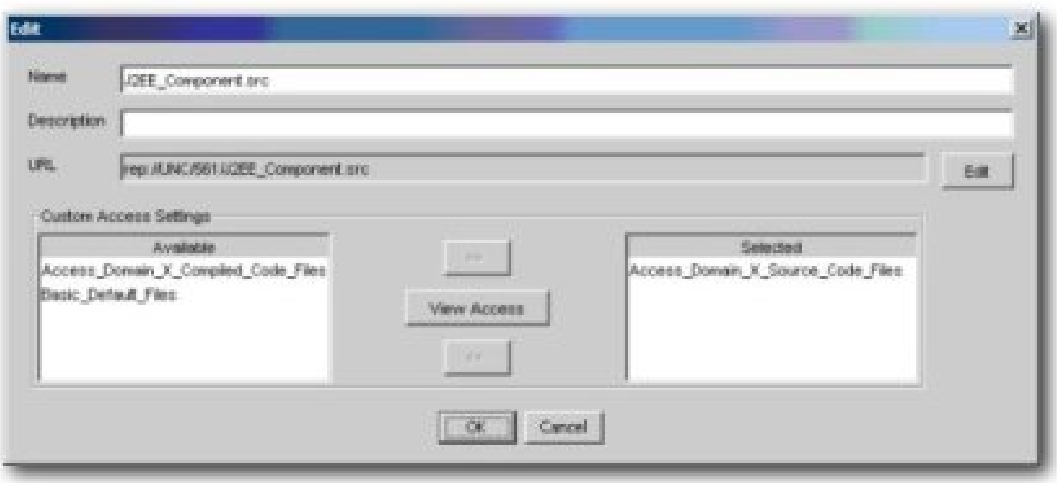
4. Create the following **Custom Access Settings**:
    - **Access_Domain_X_Compiled_Code_Files**
        - For users who can see compiled code files.

    - **Access_Domain_X_Source_Code_Files**
        - For users who can see source code files.

5. Remove the **Basic_Default_Files** CAS from the targeted assets. (This assumes that the **Default File** CAS has been set up.).



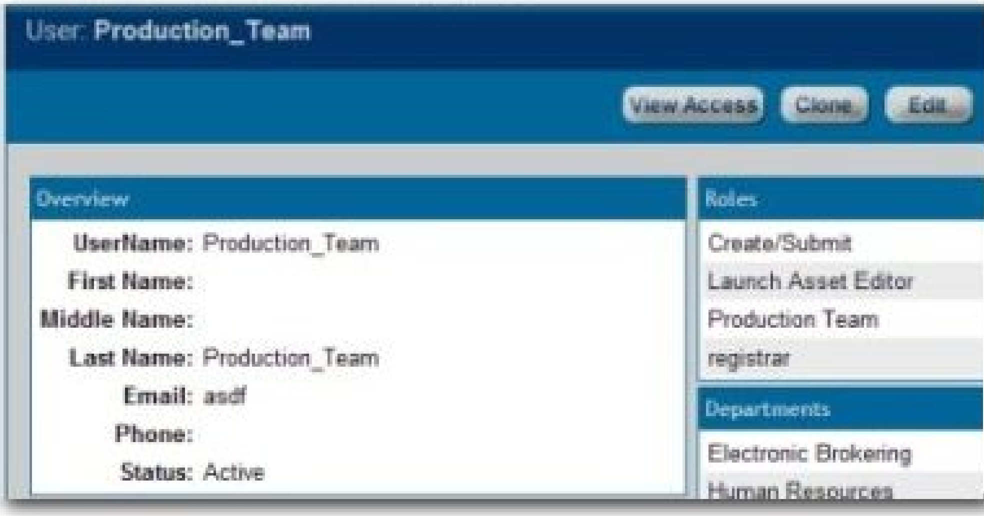
6. Assign the **Access_Domain_X_Compiled_Code_Files** CAS to all compiled code files.



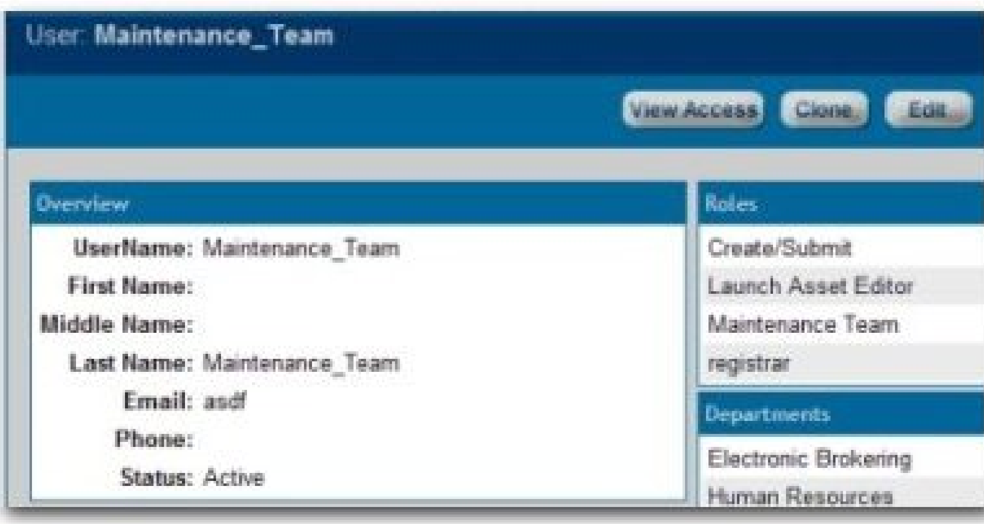
7. Assign the **Access_Domain_X_Source_Code_Files** CAS to all source code files.

The images below illustrate the **Production Team**, **Maintenance Team**, and **Consumer** roles, and the relevant CAS settings.

- **Production_Team (all production users): Roles**

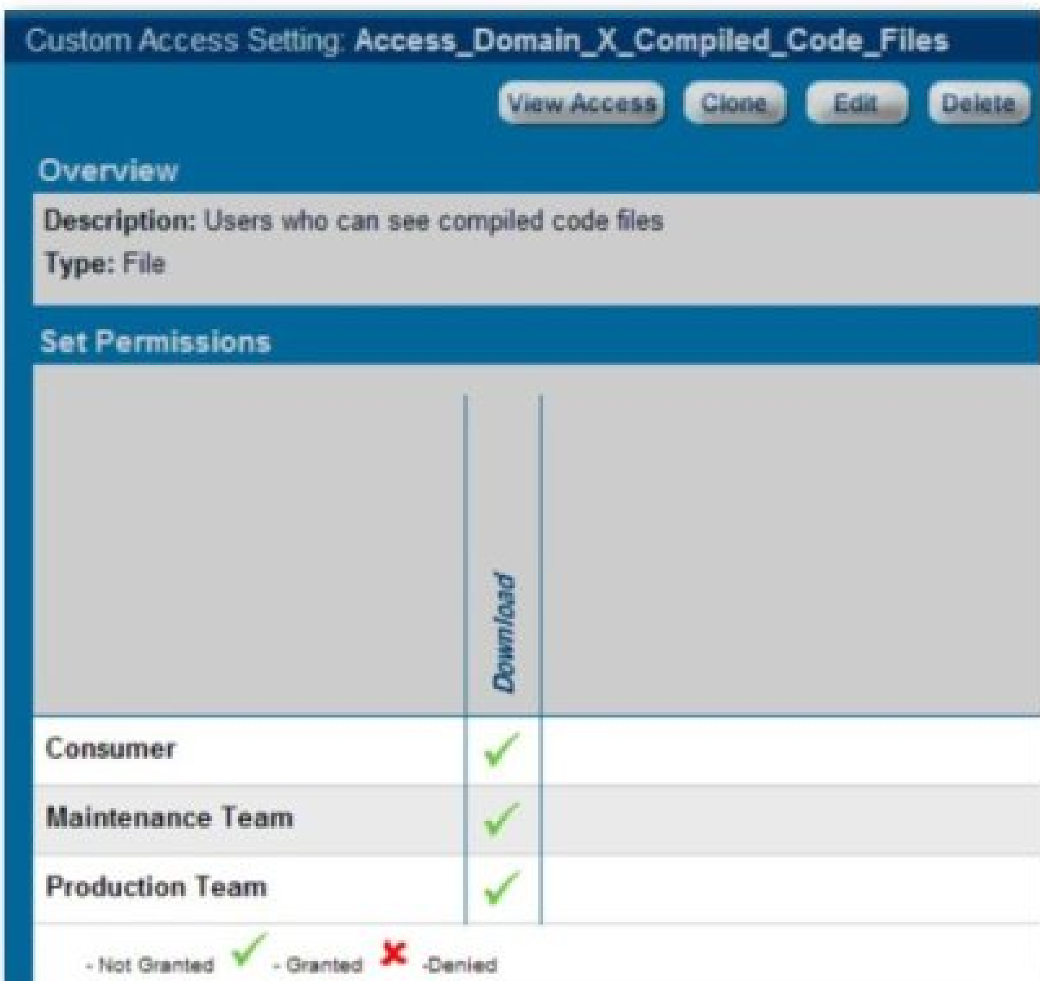


- **Maintenance_Team (all maintenance users): Roles**

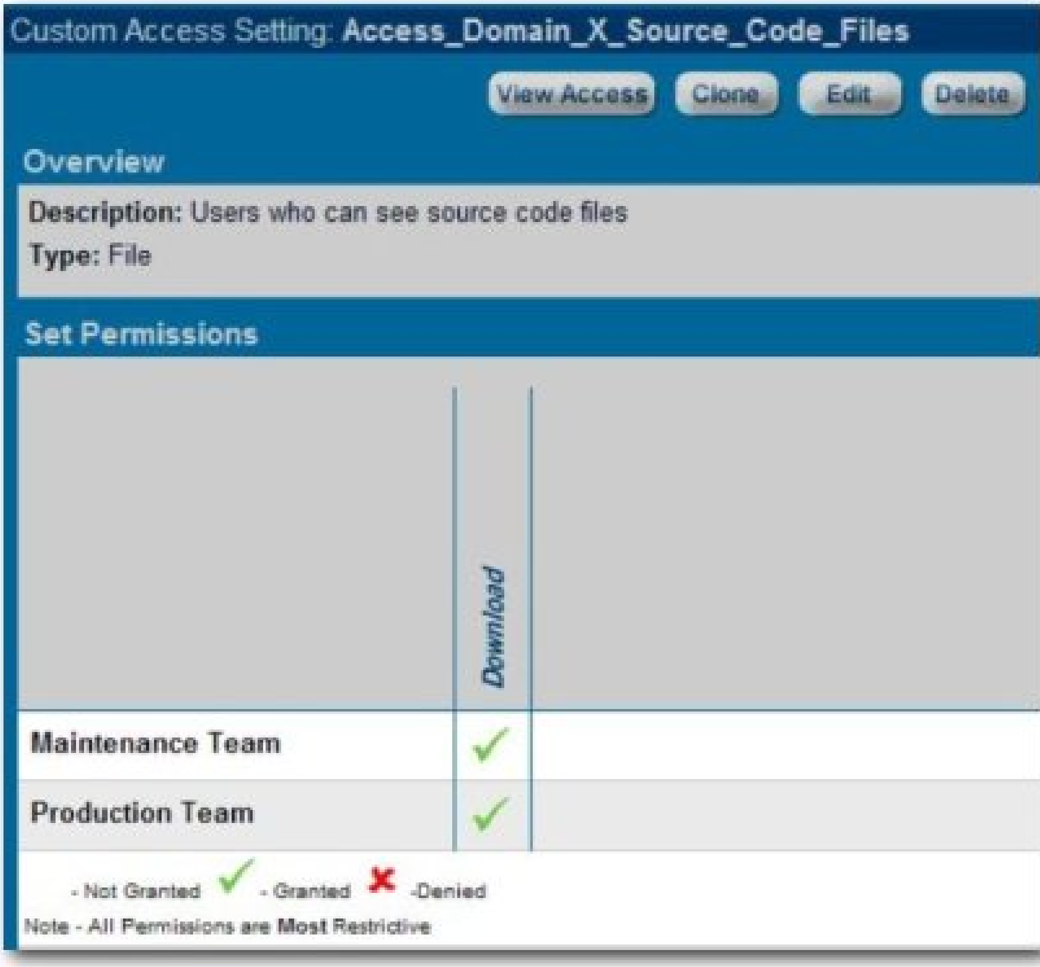


- **Figure 39: Consumers (all consumers): Roles**

- **Access_Domain_X_Compiled_Code_Files**

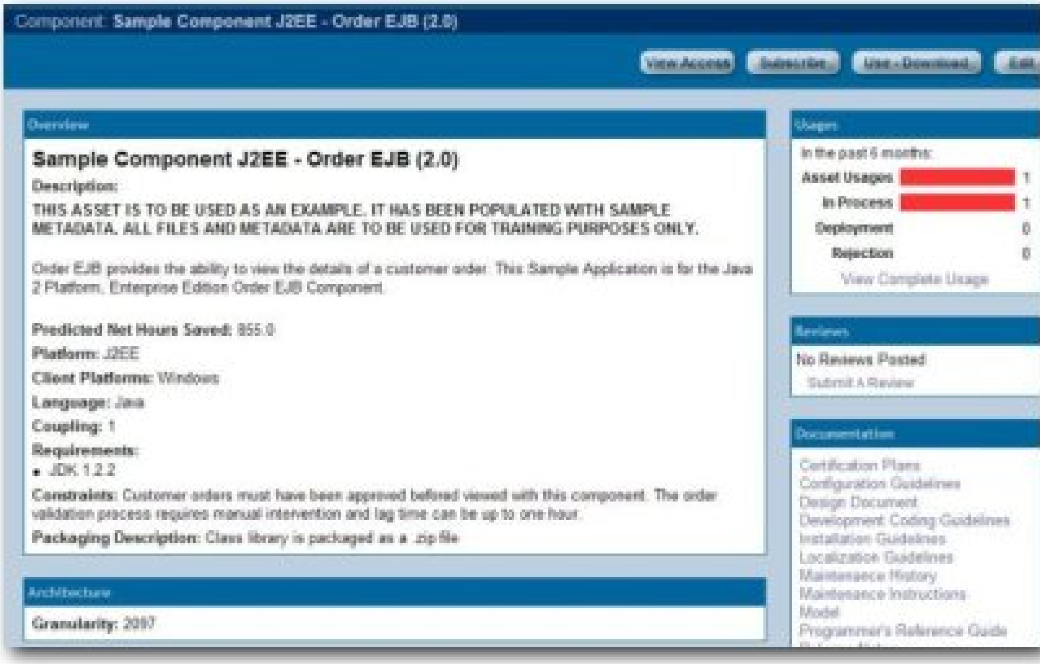


- **Access_Domain_X_Source_Code_Files**

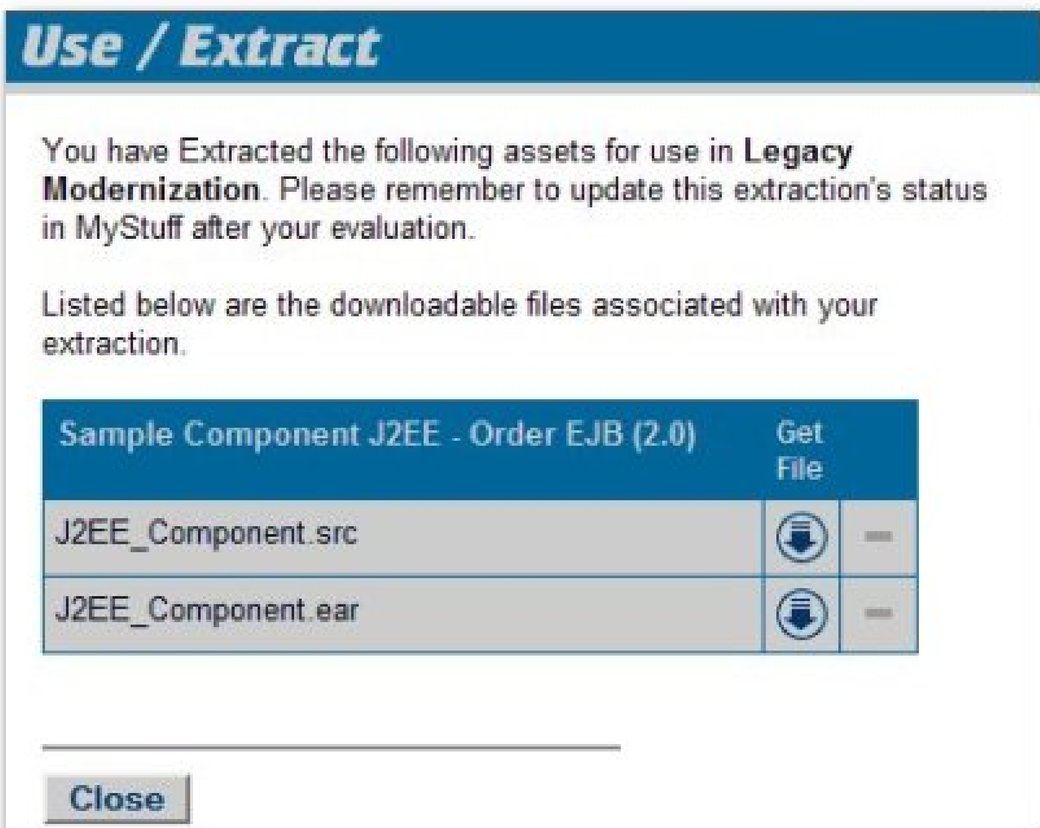


Results

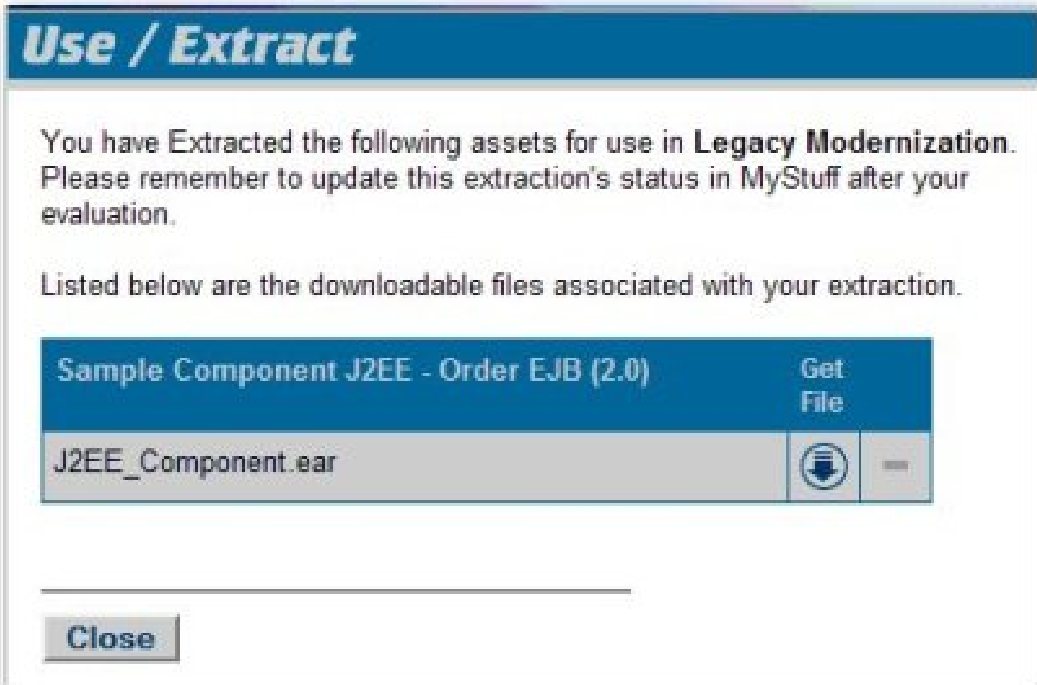
Production Team, **Maintenance Team**, and **Consumer** users see the same metadata information when viewing the asset in AquaLogic Enterprise Repository.



Production Team and **Maintenance Team** users see both the compiled and source code files during asset download



Consumers see only the complied code file during asset download (Fig 44).



Validation Test

Verify the following conditions for each role.

- **Production_Team** and **Maintenance_Team**:
  - Both source and compiled code files should be visible after clicking the **Use/Download** button.
  - The **Edit** button should be visible when viewing the asset in AquaLogic Enterprise Repository.

- **Consumer**:
  - Only compiled code files are visible after clicking the **Use/Download** button.
  - The **Edit** button does not appear on assets for which the **Consumer** has access to compiled code only. If the **Consumer** has edit permission for assets containing source code, the source code files will be visible to the **Consumer** in the **Asset Editor**.

Use Case #6: Grant Browse-only Repository Access to Specific Groups

Benefit

The settings described in this scenario allow control over the rollout of the Repository within an organization by providing everyone with browse-only Repository access. This is helpful when promoting Repository use to a large group of development teams. Additional access can be assigned as necessary to the appropriate roles by the **Access Administrator**, as determined by organizational policy.

Overview

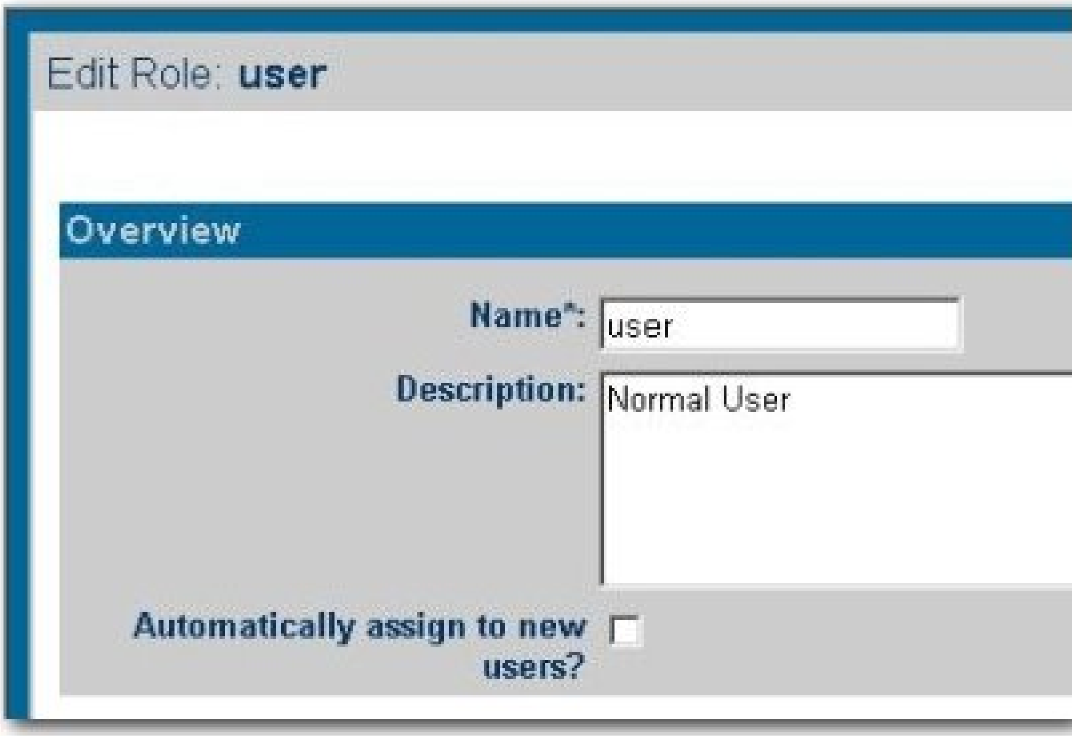
In this scenario, all Repository users are automatically assigned browse-only access. It is likely that users will be authenticated against LDAP, and will gain access to the Repository using their standard organization-assigned login user name and password. As these users determine their need for additional functionality, they can be assigned additional roles by Repository administrators.

Solution

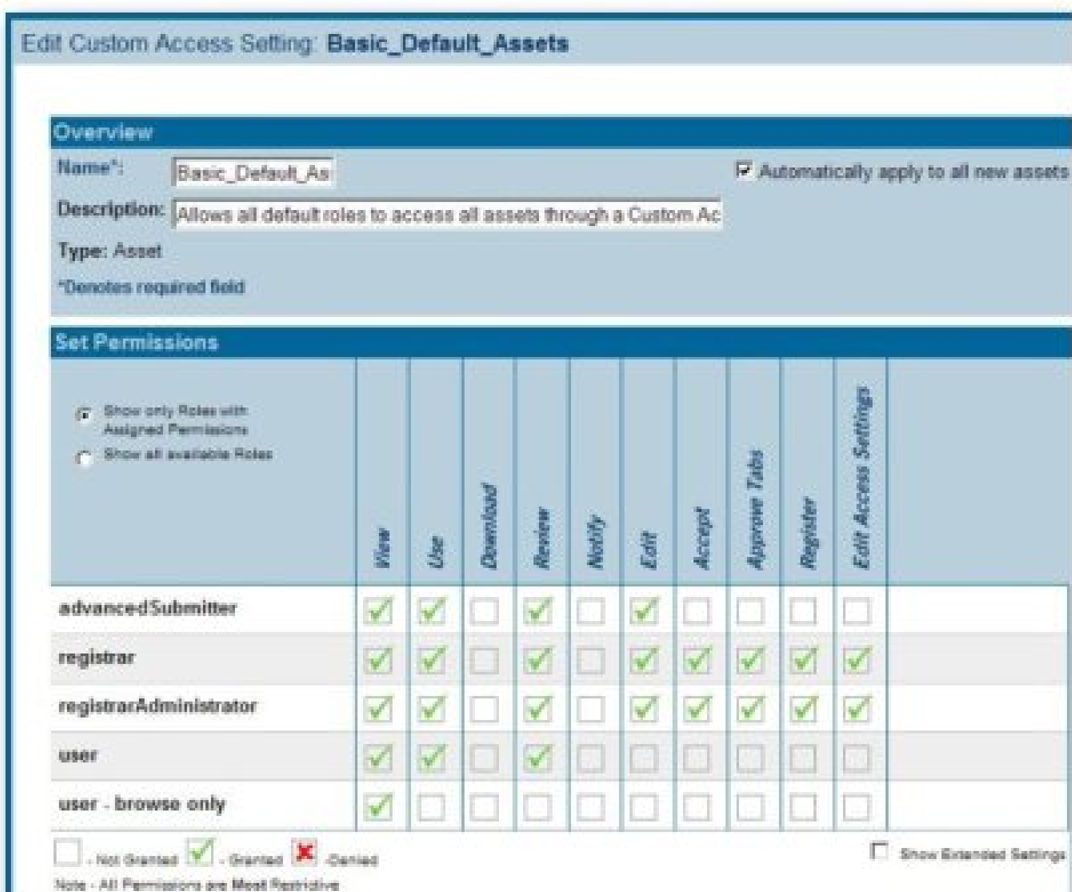
1. Create the following role:
    - **user - browse only**

2. Ensure that this role will be automatically assigned to new users.

3. Edit the **User** role to ensure that it is **not** automatically assigned to new users.



4. Edit CAS: **Basic_Default_Assets**.



- Click the **Show all available roles** radio button to see the full list of available roles.
- Assign **View** access to **user - browse only** by checking the appropriate box.
- Save the CAS

Validation Test

1. Add a new user to the system
    - Verify that the new user is assigned browse-only privileges:
    - Can view and subscribe to all assets
    - Can access **My Stuff**
    - Cannot submit assets
    - Cannot download assets
    - Cannot review assets