

webMethods BPM and CAF Workspace Metadata Help

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This document applies to Workspace Metadata 10.11 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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This guide contains the *webMethods BPM and CAF Workspace Metadata Help* in PDF book format. The information in this guide is the same information that you can view via the Software AG Designer online help.

Document Conventions

Convention	Description
Bold	Identifies elements on a screen.
Narrowfont	Identifies service names and locations in the format <i>folder.subfolder.service</i> , APIs, Java classes, methods, properties.
<i>Italic</i>	Identifies: Variables for which you must supply values specific to your own situation or environment. New terms the first time they occur in the text. References to other documentation sources.
Monospace font	Identifies: Text you must type in. Messages displayed by the system. Program code.
{ }	Indicates a set of choices from which you must choose one. Type only the information inside the curly braces. Do not type the { } symbols.
	Separates two mutually exclusive choices in a syntax line. Type one of these choices. Do not type the symbol.
[]	Indicates one or more options. Type only the information inside the square brackets. Do not type the [] symbols.
...	Indicates that you can type multiple options of the same type. Type only the information. Do not type the ellipsis (...).

Online Information and Support

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You can find documentation on the Software AG Documentation website at <https://documentation.softwareag.com>.

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Data Protection

Software AG products provide functionality with respect to processing of personal data according to the EU General Data Protection Regulation (GDPR). Where applicable, appropriate steps are documented in the respective administration documentation.

1 Workspace Metadata

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webMethods Workspace Metadata

With webMethods workspace metadata, you can locate and re-use local process assets.

This webMethods Workspace Metadata Help contains supporting documentation about the following main topics:

- [“Metadata in Your Workspace” on page 10](#)
- [“The Workspace Index” on page 11](#)
- [“Configuring Workspace Index Preferences” on page 13](#)

For information about working with CentraSite metadata for process and Integration Server assets, see *webMethods BPM Process Development Help* and *webMethods Service Development Help*, respectively. For a general overview of CentraSite functionality, see [“Metadata in CentraSite ” on page 14](#).

Metadata in Your Workspace

Metadata is data that describes the assets in webMethods components. An asset is any object you create and work with in a webMethods component. For example, in Designer, assets include processes, tasks, portlets, and so on. Each asset in Designer has metadata automatically generated about it and saved to the workspace index — a process referred to as *workspace indexing*.

Note:

You can disable automatic workspace indexing. For more information, see [“Enabling or Disabling Workspace Indexing” on page 11](#).

Metadata consists of a variety of information about an asset. All assets have names and (optionally) descriptions. An asset also may have values for certain properties, such as the **Process ID** of a process. If an asset references other assets, like a task step that references a service, it will have metadata about such associations.

The essential idea of metadata is to provide information describing each asset, what it contains, and what assets it references or depends on.

Metadata is accessed by using Designer's search capabilities. You can search metadata for information about various assets. For more information, see [“webMethods Workspace Metadata Search” on page 16](#).

Before making a change to an asset, you might want to locate any assets that refer to it or are dependent on it. This helps ensure you are not making changes that would adversely affect other assets. For more information, see [“Related Assets” on page 22](#).

Local metadata that is stored on your computer is referred to as workspace metadata. Workspace metadata is stored in a database, on your computer, called the workspace index (see [“The Workspace Index” on page 11](#)).

You can also share workspace metadata with other users by publishing it to CentraSite (see [“Metadata in CentraSite ” on page 14](#)).

Important:

When you reuse an asset from CentraSite, only a minimally required amount of information about that asset is transferred to the workspace where you use it. As a result, when you query the workspace, you do not find the same metadata you find when you query CentraSite. Additionally, reference chains in CentraSite are not fully reflected in the workspace. If process A references process B, which references process C in CentraSite, when you reuse process B in your workspace, the relationship between B and C is not preserved. When you reuse an Integration Server service from CentraSite, you lose the information about the relationships that Integration Server service has with other assets. If service A calls service B, and you reuse service A, you only get service A.

For information about setting CentraSite preferences, see the *CentraSite Help*.

The Workspace Index

The *workspace index* refers to the local database containing metadata about local assets in the current Designer workspace. The database resides on your computer. There is a separate workspace index for each Designer workspace.

Enabling or Disabling Workspace Indexing

By default, workspace indexing is enabled. Whenever you create an asset or save changes to an asset, local metadata about it is automatically generated. You can enable or disable workspace indexing in Designer's preferences.

Important:

If you disable workspace indexing, no workspace metadata is created. Assets without workspace metadata are not included in webMethods workspace searches.

Note:

If you enable workspace indexing after you have created or modified assets while workspace indexing is disabled, see [“Resetting the Workspace Index” on page 13](#) for important information about how the workspace index is affected.

➤ To enable or disable workspace indexing

1. In Designer: **Window > Preferences > Software AG Workspace Index**.
2. In the Metadata settings, select **Disable Workspace Indexing** to disable workspace indexing. Clear the check box to enable it.
3. Click **OK** to close the Preferences window.
4. Restart Designer.

You can continue working in Designer without restarting it. However, any change to workspace indexing does not take effect until you restart Designer.

About Resetting the Workspace Index

There are situations in which you may want to regenerate workspace metadata for all projects and their assets in a Designer workspace. This is referred to as *resetting* the workspace index. For information on carrying out this procedure, see [“Resetting the Workspace Index” on page 13](#).

Typically, there are two situations in which you may want to reset the workspace index:

- To capture metadata about assets that were created or modified with workspace indexing disabled.
- You suspect the workspace index has become corrupted in some way.

These two scenarios are discussed in more detail below.

Resetting after workspace indexing was disabled:

You may need to reset the workspace index to capture metadata about assets that were created or modified when workspace indexing was disabled. Workspace metadata is created or updated *only when a file change event occurs*. Therefore, simply re-enabling workspace indexing will not generate the missing metadata retroactively. In such cases, you should consider resetting the workspace index to create or update the metadata for all assets.

Resetting when the workspace index is possibly corrupted:

If you suspect the workspace index has become corrupted, you may want to reset it. For example, corruption may be indicated if you have created an asset and you are certain that workspace indexing is enabled, but when you search for workspace metadata on that asset, nothing is found.

If this happens for a single asset, you can make a trivial change to the asset and save it; then, reverse the change and save it again. This should trigger workspace indexing for the asset. If workspace metadata seems to be missing for several assets, consider resetting the workspace index.

For additional information, see *webMethods BPM Process Development Help*.

Overview of the resetting procedure

The process of resetting the workspace index begins with deleting the existing database files that contain the workspace metadata, and then restarting Designer. Upon startup, when no workspace index is found, Designer automatically creates an empty workspace index.

Finally, you must close and open each project, which triggers workspace indexing for all assets in each project.

For the complete procedure, see [“Resetting the Workspace Index” on page 13](#).

Note:

Each workspace has its own workspace index. If you have multiple workspaces and want to reset their workspace indexes, you must apply the reset procedure to each individual index.

Resetting the Workspace Index

> To reset a workspace index

Note:

If you are resetting the workspace index because you had previously disabled workspace indexing, be sure to enable indexing before exiting Designer. See [“Enabling or Disabling Workspace Indexing”](#) on page 11.

1. Exit Designer.
2. Delete the workspace index folder:
 - a. In a file browser or explorer, go to
`<workspace>\.metadata\.plugins\com.softwareag.metadata.eclipse\`

where `<workspace>` is the Designer workspace in question (for example, on Windows, the default workspace is commonly `C:\Documents and Settings\\workspace`).
 - b. Delete the `index` folder if it exists.
3. Start Designer and select the workspace.
4. In the Navigator view, close and re-open each project:

Each top-level item in the tree is a project. For each project, right-click and select **Close Project**. Then, right-click the project again and select **Open Project**.

When you re-open a project, the status bar on the lower right of the Designer window will indicate "Extracting changed files." This means workspace metadata is being generated for the project's assets.

Note:

If there is not much workspace metadata to be extracted, this message appears so briefly you may not see it.

To ensure all local metadata is extracted, be sure to close and re-open all projects you see in the Navigator view.

For additional information, see *webMethods BPM Process Development Help*.

Configuring Workspace Index Preferences

> To configure Workspace Index preferences

Note:

For additional information about this preference, see [“Enabling or Disabling Workspace Indexing”](#) on page 11.

1. In Designer: **Window > Preferences > Software AG > Workspace Index**.
2. You can configure the following Workspace Index preferences:

Preference	Description
Disable Workspace Indexing	Select this check box to disable workspace indexing. By default, workspace indexing is enabled. Whenever you create an asset or save changes to an asset, metadata about it is automatically generated. If you disable workspace indexing, no workspace metadata is created. Assets without workspace metadata are not included in webMethods workspace searches.

3. To apply default preferences on a page, click **Restore Defaults**.
4. Click **Apply** to save your changes and keep the Preferences window open.
Click **OK** to save your changes and close the Preferences window.
Click **Cancel** to close the Preferences window without saving your changes.

Metadata in CentraSite

CentraSite is a shared repository and registry. Assets are stored in the repository, and information about those assets, or metadata, is stored in the registry. Both the workspace index and the CentraSite registry contain metadata about assets. The difference is that the workspace index is accessible only by you on your own computer, while the CentraSite registry is accessible to other users. The CentraSite registry resides on and is maintained by a server on the network.

The main purpose of the CentraSite registry is to allow reuse of assets among users. You can publish metadata about an asset to CentraSite. Other users will be able to see the published metadata and incorporate one or more references to the asset into their own projects.

For information about working with CentraSite metadata for process and Integration Server assets, see *webMethods BPM Process Development Help* and *webMethods Service Development Help*, respectively.

Note:

You cannot publish asset metadata to CentraSite unless the asset exists in the workspace. However, workspace indexing is not required for publishing to CentraSite. Local (workspace) metadata about an asset is created automatically when you enable workspace indexing. For more information, see [“The Workspace Index”](#) on page 11.

2 Workspace Metadata Search

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webMethods Workspace Metadata Search

To locate assets and/or asset references, Designer searches the metadata associated with assets. You can choose to search only the workspace index, only CentraSite, or both the workspace index and CentraSite. For more information, see [“Metadata in Your Workspace” on page 10](#), as well as *webMethods BPM Process Development Help* and *webMethods Service Development Help*.

Important:

When you re-use an asset from CentraSite, only a minimally required amount of information about that asset is transferred to the workspace where you use it. As a result, when you query the workspace, you do not find all the same metadata you find when you query CentraSite. Additionally, reference chains in CentraSite are not fully reflected in the workspace. If process A references process B, which references process C in CentraSite, when you reuse process B in your workspace, the relationship between B and C is not preserved. When you re-use an Integration Server (IS) service from CentraSite, you lose the information about the relationships that Integration Server service has with other assets. If service A calls service B, and you reuse service A, you only get service A.

Note:

If you have workspace indexing disabled now or had it disabled in the past, you might have assets in your workspace that have missing or incomplete metadata. In this case, the search will not properly locate these assets. See [“Enabling or Disabling Workspace Indexing” on page 11](#).

The following table lists the types of searches that Designer provides for searching for assets:

Type of Search	How to Access	Description
Basic keyword search	webMethods tab in the Search window	Use to locate assets or asset references based on keywords contained in the asset's name and/or description. In both Basic and Advanced searches, you can locate all assets of a particular type by selecting the asset and specifying no search criteria.
Advanced search	webMethods Advanced tab in the Search window	<p>Use to locate assets of a single type. For example, you can search for portlets or you can search for IS document types, but not both portlets and IS document types in a single search.</p> <p>The advanced search allows you to specify detailed search criteria to locate specific assets. For example, you can search for processes with names that contain "HR", with a model version that is equal to "2", and that references another process with a name that contains "approve".</p> <p>In both webMethods basic and advanced searches, you can locate all assets of a particular</p>

Type of Search	How to Access	Description
		type by selecting the asset and specifying no search criteria.
Saved searches	Saved Searches view	<p>Use to locate assets of a single type. For example, you can search for portlets or you can search for processes, but not both portlets and processes in a single search.</p> <p>Designer provides predefined saved searches of assets used in your solutions. You can search your workspace for all CAF Task Types, Portlets, or Processes; and you can search CentraSite for all Documents, E-forms, IS Services, Rule Services, or Web Services.</p> <p>You can define and save additional searches. When defining your own saved search, you can specify detailed search criteria to locate specific assets, similar to the criteria you can specify for an advanced search.</p>

Performing Basic Searches


Use a basic search to locate assets or asset references based on keywords contained in the asset's name and/or description. Designer displays the results of your search in the Search view.

To locate assets and/or asset references, Designer searches the metadata associated with assets. You can choose to search only the workspace index, or both the workspace index and CentraSite. For more information, see [“The Workspace Index” on page 11](#) as well as *webMethods BPM Process Development Help* and *webMethods Service Development Help*.

Note:

If you have workspace indexing disabled now or had it disabled in the past, you might have assets in your workspace that have missing or incomplete metadata. In this case, the search will not properly locate these assets. See [“Enabling or Disabling Workspace Indexing” on page 11](#).

➤ To perform a basic search for webMethods assets

1. In Designer:  **Search**.
2. The **webMethods** tab has focus by default. Selections from the previous search are retained.
3. In the **Name or description contains** field, specify a keyword that is contained in the name or description of the assets you want to locate. The search is not case sensitive.

4. Select the type of assets that you want to locate from the **Asset Type** list. You can select **All** to search for all types of assets and asset references, or you can select one of the listed asset types.
5. In the **Search in** field, select:
 - **Workspace** to search metadata in the workspace index only.
 - **CentraSite** to search metadata in CentraSite only.
 - **Workspace & CentraSite** to search metadata in both the workspace index and CentraSite.
6. Click **Search**.

Performing Advanced Searches


Use an advanced search to specify detailed search criteria to locate specific assets. When you perform an advanced search, you can only locate assets of a single type. For example, you can search for portlets or you can search for Integration Server document types, but not both portlets and Integration Server document types in a single search. Designer displays the results of your search in the Search view.

To locate assets and/or asset references, Designer searches the metadata associated with assets. You can choose to search only the workspace index, or both the workspace index and CentraSite. For more information, see [“The Workspace Index” on page 11](#) and [“Metadata in CentraSite ” on page 14](#).

Note:

If you have workspace indexing disabled now or had it disabled in the past, you might have assets in your workspace that have missing or incomplete metadata. In this case, the search will not properly locate these assets. See [“Enabling or Disabling Workspace Indexing” on page 11](#).

➤ To perform an advanced search for webMethods assets

1. In Designer:  **Search**.
2. Click the **webMethods Advanced** tab.

Selections from the previous search are retained.
3. Select the type of asset you want to locate from the **Asset Type** list.
4. For each search criterion you want to use:
 - a. Click **Add**.
 - b. In the Add Query Condition window, click **Asset Field** and select an item. The items that Designer includes in the **Asset Field** list depends on the **Asset Type** you select.

- c. Complete specifying the condition for the selected **Asset Field**. Note that the search is not case sensitive.
 - d. Click **OK**.
5. In the **Match condition** field, select:
 - **Any** to have Designer locate assets that match any of the criteria you specified.
 - **All** to have Designer locate assets only if they match all of the criteria that you specified.

Note:

If you select **References** from **Asset Field** and **All** for **Match condition**, Designer finds assets that contain all the specified references, but those references do not necessarily have to be all in one place. For example, if you have a condition to locate all processes that reference processes with names that contain "HR" and also reference processes with a process version that contains "2", Designer might find a process that contains one step for a referenced process with the name "HR-Tasks" and a process version "3" and another step for a referenced process with the name "ApproveOrder" and a process version "2".

6. In the **Search in** field, select:
 - **Workspace** to search metadata in the workspace index only.
 - **CentraSite** to search metadata in CentraSite only.
 - **Workspace & CentraSite** to search metadata in both the workspace index and CentraSite.

Note:

Services and documents associated with processes are not searchable in the workspace. However, you can show the references and dependencies of processes to locate these assets. See [“Showing Asset References and Dependencies”](#) on page 23.

7. To initiate the search, click **Search**.

Configuring Search Preferences

You can configure standard Eclipse preferences for searching. For more information, see the Eclipse documentation.

➤ To configure Search preferences

1. In Designer: **Window > Preferences > General > Search**.
2. Set the preferences you want for each of the following options. You can also click **Restore Defaults** to reset all Search preferences to their initial installed values.

Search Preference	Description
Reuse editors to show matches	Use the same editor for search results to reduce the number of open editors. Enabled by default.
Bring Search view to front after search	Bring the Search view to the front after performing a search. Enabled by default.
Ignore potential matches	Select this option if you want to see exact matches only.
Emphasize potential matches	Highlight potential matches in the Search view. If the Search engine isn't 100% sure about the match, it is not considered a potential match. Enabled by default.
Foreground color for potential matches	Select the foreground color for potential matches.
Limit table size for file search results to:	Enter a value to limit the number of file search results.
Default perspective for the Search view	Select the perspective that should be brought to the front when there are new search results. Default is None .

- For more information about each of these options, see Eclipse documentation.
- Click **Apply** to apply your changes without closing the Preferences window.

Click **OK** to apply your changes and close the Preferences window.

Search View


The Search view is a standard Eclipse view. Designer displays the results of a search in the Search view.





Search results do not display referenced assets. For example, if you publish a package that contains one service, but that service in turn calls other services in different packages, then when you search for all services you will only see the one service in the package you published, not all of the referenced services. To see what your one service depends on, you can click **Show Dependencies**, and to see what your one service refers to, you can click **Show References**.

When you choose to show references or dependencies in the Solutions or Registry Explorer view, the results are shown in the Search view. See [“Showing Asset References and Dependencies” on page 23](#).

You can take the following actions from the Search view:

Action	Description
View dependencies of an asset	Right-click a row in the Search view.

Action	Description
	<p>Select Show Dependencies > ☰ In CentraSite or Show Dependencies > ☰ In Workspace.</p> <p>For more information, see “Showing Asset References and Dependencies” on page 23.</p> <p>Note: Because Designer uses metadata to determine dependent assets, if you have set your Designer preferences to disable workspace indexing, the Search view might not list all dependencies. See “Enabling or Disabling Workspace Indexing” on page 11.</p>
View references of an asset	<p>Right-click a row in the Search view.</p> <p>Select Show References > ☰ In CentraSite or Show References > ☰ In Workspace.</p> <p>For more information, see “Showing Asset References and Dependencies” on page 23.</p> <p>Note: Because Designer uses metadata to determine referenced assets, if you have set your Designer preferences to disable workspace indexing, the Search view might not list all references. See “Enabling or Disabling Workspace Indexing” on page 11.</p>
Add an item in the search results to the process editor's canvas	<p>Select a row in the search results and drag it on to the canvas.</p> <p>Note: The item in the search result must be appropriate for the type of asset on the canvas for the drag and drop to succeed.</p> <p>Note: When you use an asset from CentraSite, you are creating a reference to that asset. You are not including the asset itself in your project or solution; rather, you are referencing the asset based on its metadata in CentraSite. CentraSite assets show  CentraSite in the Store column.</p>
⬇ Show Next Match	Selects the next item in the search results.
⬆ Show Previous Match	Selects the previous item in the search results.
✖ Remove Selected Matches	Removes the currently selected matches from the Search view. Select one, or CTRL + click to select multiple matches.
✖ Remove All Matches	Removes all matches currently shown in the Search view.

Action	Description
 Run the Current Search Again	Repeats the current search to reflect changes to results.
 Cancel Current Search	Cancels the current search.
 Show Previous Searches	<p>Browse previously conducted searches and repeat a previous search. Shows previous searches and allows you to select one.</p> <p>Select ▾ Show Previous Searches Menu to see a list of the most recent searches. Select one to run again.</p> <p>Select ▾ Show Previous Searches Menu > History to see the history of your previous searches.</p> <p>Select ▾ Show Previous Searches Menu > Clear History to remove all previous search history information, including the one currently displayed.</p>
 Pin the Search View	Pinning the Search view means that subsequent searches display results in another Search view, leaving the pinned view and its results unchanged.

Designer displays the Search view automatically when you execute a search. If you close the Search view and want to reopen it, click **Window > Show View > General >  Search**.

For additional information, see *webMethods BPM Process Development Help*.

Related Assets

Search results do not display referenced assets. For example, if you publish a package that contains one service, but that service in turn calls other services in different packages, then when you search for all services you will only see the one service in the package you published, not all of the referenced services. To see what your one service depends on, you can **Show Dependencies**, and to see what your one service refers to, you can **Show References**.

For a selected asset, you can view related assets: references and dependencies. Referenced assets are used by the selected asset. Dependent assets use, or "depend on," the selected asset. For example, a process might use a number of Integration Server (IS) services. The IS services are references of the process.

You can view the related assets of an asset by right-clicking it in the Solutions or Registry Explorer view and then choosing **Show References** or **Show Dependencies**. The related assets are displayed in the Search view.

You can also view the related assets of an asset returned by a search. In the Search view, right-click the asset and choose **Show References** or **Show Dependencies**.

Related asset information is metadata that comes from either the workspace index or CentraSite. When you choose to view related assets, you are given a choice of viewing the related asset information from the workspace index or CentraSite.

The related asset information for the same asset might be different in the workspace index than in CentraSite. The latest changes to the asset reflected in the workspace index may not have been published to CentraSite, or the version in the workspace index may not have been updated with the latest changes reflected in CentraSite.

Only directly related assets are shown in the Search view. For example, if A references B and B references C, only B is shown as a reference of A. C is not shown because it is not *directly* referenced by A.

For additional information, see *webMethods BPM Process Development Help*.

Showing Asset References and Dependencies

When you choose to show the related assets of an asset, they are displayed in the Search view:

- ⓘ References are the assets that are used by (referred to by) the selected asset.
- ⓘ Dependencies are the assets that use (depend on) the selected asset.

Note:

If you have workspace indexing disabled now or had it disabled in the past, you might have assets in your workspace that have missing or incomplete metadata. In this case, Designer might not show all references or dependencies. See [“Enabling or Disabling Workspace Indexing” on page 11](#).

> To show the references or dependencies of an asset

1. In the Solutions or Search view, right-click the asset you want to work with.
2. Click **Show References** or **Show Dependencies** and then click:
 - ⓘ **In CentraSite** to show referenced or dependent assets (based on your selection) found in CentraSite.
 - ⓘ **In Workspace** to show referenced or dependent assets (based on your selection) found in the workspace index.

Note:

The related asset information for the same asset might be different in the workspace index than in CentraSite. The latest changes to the asset reflected in the workspace index may not have been published to CentraSite, or the version in the workspace index may not have been updated with the latest changes reflected in CentraSite.

3. Designer displays referenced or dependent assets (based on your selection) in the Search view.

Note:


Only direct references and direct dependencies (based on your selection) are shown. For example, A references B and B references C. If you choose to view the references of A, only B is shown. Likewise, A has dependency B and B has dependency C. If you choose to view the dependencies of A, only B is shown.












For additional information, see *webMethods BPM Process Development Help* and *webMethods Service Development Help*.

Saved Searches View

The Saved Searches view allows you to perform searches that are already defined. These searches can include assets in your local workspace, CentraSite, or both. When you execute a saved search, Designer displays the results in the Search view.

Designer provides predefined saved searches of assets used in your solutions. You can search your workspace for all CAF Task Types, Portlets, or Processes; and you can search CentraSite for all Documents, E-forms, IS Services, Rule Services, or Web Services.

webMethods predefined saved searches are designated by the  **webMethods Predefined Saved Search** icon. You cannot edit, delete, rename, or duplicate any of the predefined saved searches.

webMethods Predefined Saved Search Use this saved search to locate...	
 All CAF Task Types in Workspace	All CAF task types in your workspace.
 All Documents in CentraSite	All Integration Server (IS) or Trading Networks (TN) document types in CentraSite.
 All Documents in CentraSite	All IS/TN documents in CentraSite.
 All E-forms in CentraSite	All e-forms in CentraSite. The Name field displays the template name.
 All IS Services in CentraSite	All IS services in CentraSite (including rule services and Web services).
 All IS Services in CentraSite	All Integration Server (IS) services in CentraSite. Note: Integration Server (IS) services include rule services.
 All Portlets in Workspace	All portlets in your workspace.
 All Processes in Workspace	All processes in your workspace.
 All Rule Services in CentraSite	All rule services in CentraSite.
 All Web Services in CentraSite	All Web services in CentraSite.
 All Rule Services in CentraSite	All rule services in CentraSite.


webMethods Predefined Saved Search Use this saved search to locate...

 **All Web Services in CentraSite** All Web services in CentraSite.

In addition to the predefined saved searches that webMethods provides, you can create additional saved searches where you define the search criteria. You can delete, rename, and change the criteria for saved searches that you define.

To add a new saved search, you can:

- Create a new saved search where you specify all the criteria.
- Duplicate an existing saved search and edit the criteria if you want to add a saved search that is similar to an existing one.
- Import saved searches that were previously exported.



The Saved Searches view is shown by default in the Process Development perspective. If you close the Saved Searches view and want to reopen it, or if you want to open it in another perspective, click **Window > Show View >  Saved Searches**.

For additional information, see *webMethods BPM Process Development Help*.

Creating Saved Searches

Use a saved search to specify detailed search criteria to locate specific assets. When you create a saved search, you can define criteria to locate only assets of a single type. For example, you can define a saved search for portlets or you can define a saved search for IS document types, but you cannot define a single saved search that locates both portlets and IS document types. You can save workspace searches, CentraSite searches, or searches of both the workspace and CentraSite.

➤ To create a saved search

1. In Designer, if the Saved Searches view is not visible, display it: **Window > Show View >  Saved Searches**.
2. In the Saved Searches view, click  **Add Saved Search**.
3. In the Add Saved Search window, type a **Search Name**.
4. Select the type of asset you want the saved search to locate from the **Asset Type** list.
5. For each search criterion you want to use:
 - a. Click **Add**.
 - b. In the Add Query Condition window, click **Asset Field** and select an item. The items that Designer includes in the **Asset Field** list depends on the **Asset Type** you select.

Note:

Although Designer will allow any entry in the Provide the Attribute Name to Search box, the attribute must exist in the Web service taxonomy in order to return valid results.

- c. Complete specifying the condition for the selected **Asset Field**. Note that the search is not case sensitive.
 - d. Click **OK**.
6. In the **Match condition** field, select.
- **Any** to have Designer locate assets that match any of the criteria you specified.
 - **All** to have Designer locate assets only if they match all of the criteria that you specified.

Note:

If you select **References** from **Asset Field** and **All** for **Match condition**, Designer finds assets that contain all the specified references, but those references do not necessarily have to be all in one place. For example, if you have a condition to locate all processes that reference processes with names that contain "HR" and also reference processes with a process version that contains "2", Designer might find a process that contains one step for a referenced process with the name "HR-Tasks" and a process version "3" and another step for a referenced process with the name "ApproveOrder" and a process version "2".

7. In the **Search in** field, click:
- **Workspace** to search metadata in the workspace index only.
 - **Workspace & CentraSite** to search metadata in both the workspace index and CentraSite.
8. Click **Save**.


Duplicating Saved Searches

If you want to create a saved search that is similar to an existing one, you can duplicate an existing user-defined saved search and edit its search criteria.

Note:

You cannot edit, rename, or duplicate webMethods predefined saved searches.

> To duplicate an existing saved search

1. In Designer, if the Saved Searches view is not visible, display it: **Window > Show View >  Saved Searches**.
2. In the Saved Searches view, right-click the saved search you want to duplicate and click **Duplicate Saved Search**.

3. In the Copy Saved Search window, specify a **Saved Search Name**.
4. Click **OK**.

You can edit the duplicated saved search to update the search criteria.

Executing Saved Searches

When you execute a saved search, Designer locates assets and/or asset references that match your search criteria and displays the search results in the Search view.

Note:

If you have workspace indexing disabled now or had it disabled in the past, you might have assets in your workspace that have missing or incomplete metadata. In this case, the search will not properly locate these assets. See [“Configuring Workspace Index Preferences” on page 13](#).

> To execute a saved search

1. In Designer, if the Saved Searches view is not visible, display it: **Window > Show View > Saved Searches**.
2. In the Saved Searches view, right-click the saved search you want to execute and click **Execute Saved Search**.

Tip:

You can also double-click to execute a saved search.

Renaming Saved Searches

You can rename user-defined saved searches.

Note:

You cannot edit, rename, or duplicate webMethods predefined saved searches.

> To rename a saved search

1. In Designer, if the Saved Searches view is not visible, display it: **Window > Show View > Saved Searches**.
2. In the Saved Searches view, right-click the saved search you want to rename and click **Rename Saved Search**.
3. In the Rename Saved Searches window, specify a **New Saved Search Name**.
4. Click **OK**.


Editing Saved Searches

You can edit the search criteria for user-defined saved searches.

Note:

You cannot edit, rename, or duplicate webMethods predefined saved searches.

> To edit a saved search

1. In Designer, if the Saved Searches view is not visible, display it: **Window > Show View >  Saved Searches.**
2. In the Saved Searches view, right-click the saved search you want to edit and click **Edit Saved Search.**
3. If you want to rename the Saved Search, update the name in the **Search Name** field.
4. If you want to change the type of assets the saved search locates, select a new asset type from the **Asset Type** list.

Important:

Search criteria is based on **Asset Type**. If you select a new **Asset Type** while editing a saved search, Designer removes all existing search criteria, and you must rebuild the search.

5. To modify an existing search criterion:
 - a. Select the row for the search criterion and click **Edit.**
 - b. In the Edit Query Condition window, update the search condition.
 - c. Click **OK.**
6. To delete a search criterion, select the row for the search criterion and click **Remove.**
7. To add a new search criterion:
 - a. Click **Add.**
 - b. In the Add Query Condition window, click **Asset Field** and select an item. The items that Designer includes in the **Asset Field** list depends on the **Asset Type** you selected.

Note:

Although Designer will allow any entry in the Provide the Attribute Name to Search box, the attribute must exist in the Web service taxonomy to return valid results.

- c. Complete specifying the condition for the selected **Asset Field**. Note that the search is not case sensitive.
 - d. Click **OK**.
8. If you want to change whether Designer matches all of the search criteria or any one search criterion, update the **Match condition** field. Select:
- **Any** to have Designer locate assets that match any of the criteria you specified.
 - **All** to have Designer locate assets only if they match all of the criteria that you specified.

Note:



If you select **References** from **Asset Field** and **All** for **Match condition**, Designer finds assets that contain all the specified references, but those references do not necessarily have to be all in one place. For example, if you have a condition to locate all processes that reference processes with names that contain "HR" and also reference processes with a process version that contains "2", Designer might find a process that contains one step for a referenced process with the name "HR-Tasks" and a process version "3" and another step for a referenced process with the name "ApproveOrder" and a process version "2".

9. In the **Search in** field, select:
- **Workspace** to search metadata in the workspace index only.
 - **Workspace & CentraSite** to search metadata in both the workspace index and CentraSite.
10. Click **Save**.

Exporting Saved Searches

You can export all user-defined saved searches to an XML file. You can keep the file as a backup or use it to import the saved searches into another workspace.



> To export all user-defined saved searches

1. In Designer, if the Saved Searches view is not visible, display it: **Window > Show View >  Saved Searches**.
2. In the Saved Searches view, click ▾ **Menu** (in the upper right corner) and click  **Export Saved Searches**.
3. In the Save As window, select the location where you want to store your saved searches, specify a name for the exported XML file, and save the XML file to your file system.

Importing Saved Searches

You can import user-defined saved searches into Designer from an XML file that has been exported from Designer.

> To import user-defined saved searches from an XML file

1. In Designer, if the Saved Searches view is not visible, display it: **Window > Show View >  Saved Searches.**
2. In the Saved Searches view, click ▾ **Menu** (in the upper right corner) and click  **Import Saved Searches.**
3. In the Open window, specify the location of the XML file that contains the exported saved searches you want to import. After locating the XML file, click **Open.**