webMethods BPM and CAF CentraSite Metadata Help

Version 9.5 SP1

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This document applies to Software AG Designer Version 9.5 SP1 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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About this Guide

This guide contains information about publishing and retracting metadata for BPM, CAF, and Integration Server assets to CentraSite. By publishing asset metadata to CentraSite, you can make the assets available for reuse in other projects.

Document Conventions

Convention	Description
Bold	Identifies elements on a screen.
Narrowfont	Identifies storage locations for services on webMethods Integration Server, using the convention *folder.subfolder:service*.
UPPERCASE	Identifies keyboard keys. Keys you must press simultaneously are joined with a plus sign (+).
Italic	Identifies variables for which you must supply values specific to your own situation or environment. Identifies new terms the first time they occur in the text.
`Monospace font`	Identifies text you must type or messages displayed by the system.
{ }	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 (...).

Documentation Installation

You can download the product documentation using the Software AG Installer. Depending on the release of the webMethods product suite, the location of the downloaded documentation will be as shown in the table below.

For webMethods...	The documentation is downloaded to...
8.x and 9.x	A central directory named _documentation in the main installation directory (Software AG by default).

For webMethods...	The documentation is downloaded to...
7.x	A central directory named _documentation in the main installation directory (webMethods by default).

Online Information

You can find additional information about Software AG products at the locations listed below.

If you want to...	Go to...
Access the latest version of product documentation.	Software AG Documentation website http://documentation.softwareag.com
Find information about product releases and tools that you can use to resolve problems. See the Knowledge Center to: ■ Read technical articles and papers. ■ Download fixes and service packs. ■ Learn about critical alerts. See the Products area to: ■ Download products. ■ Download certified samples. ■ Get information about product availability. ■ Access older versions of product documentation. ■ Submit feature/enhancement requests.	Empower Product Support website https://empower.softwareag.com

If you want to...	Go to...
■ Access additional articles, demos, and tutorials. ■ Obtain technical information, useful resources, and online discussion forums, moderated by Software AG professionals, to help you do more with Software AG technology. ■ Use the online discussion forums to exchange best practices and chat with other experts. ■ Expand your knowledge about product documentation, code samples, articles, online seminars, and tutorials. ■ Link to external websites that discuss open standards and many web technology topics. ■ See how other customers are streamlining their operations with technology from Software AG.	Software AG Developer Community for webMethods http://communities.softwareag.com/

1 CentraSite Metadata

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About webMethods CentraSite Metadata Help

webMethods CentraSite metadata enables you to locate and reuse shared webMethods and other process assets in Designer. webMethodsCentraSite Metadata Help contains supporting documentation on the following main topics:

- "About Metadata in CentraSite" on page 10
- "Working with CentraSite Metadata" on page 11
- "Publishing and Retracting Metadata for BPM and CAF Assets" on page 15
- "Publishing and Retracting Metadata for IS and TN Assets" on page 19
- "Registry Explorer View" on page 12

For information about working with metadata in the local workspace, see the PDF publication *webMethods BPM and CAF Workspace Metadata Help*.

About Metadata in CentraSite

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, Integration Server documents, e-forms, Integration Server services, and Web services. CentraSite captures metadata about each Designer asset stored in its repository.

CentraSite stores a variety of metadata 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 purpose of metadata is to provide information describing each asset, what it contains, and what assets it references or depends on. The CentraSite registry enables 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. If an asset should not be reused, you can *retract* the assets from CentraSite.

For more information about using assets from CentraSite, see "Registry Explorer View" on page 12 and "Search View" on page 44.

Metadata is accessed by using Designer's search capabilities. You can search metadata for information about various assets. For more information, see "CentraSite Metadata Search" on page 39.

Designer includes two CentraSite perspectives with many advanced views and tools for a customized CentraSite experience. You can access these from:

- Window > Open Perspective > CentraSite Asset Catalog
- Window > Open Perspective > CentraSite Search and Browse

For more information about working with the CentraSite perspectives, see the *CentraSite Help* for more information.

The Designer Process Development perspective includes the Registry Explorer view so you can access your CentraSite assets without switching perspectives. See "Registry Explorer View" on page 12.

Note: 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" in *webMethods BPM and CAF Workspace Metadata Help*.

Working with CentraSite Metadata

Keep the following information in mind when working with CentraSite metadata.

- 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.
- webMethods assets are pre-installed in CentraSite. When you publish metadata to CentraSite from the Package Navigator view or Solutions view, Designer performs a check to ensure that CentraSite has the latest asset definitions. If it does, your publish action is completed. If it does not, you must update your asset definitions in CentraSite before you can publish to it. Contact your CentraSite administrator to have the updated definitions installed.
- It is possible to configure and connect to multiple CentraSite registries, but Designer can only connect to one registry at a time. For more information about connecting to CentraSite, see the *CentraSite Help*.
- Each CentraSite user can belong to only one *organization*. By default, each member of a CentraSite organization is assigned the roles of Asset Provider and Asset Consumer in the Users group of that organization, allowing the publishing and usage of assets there. Administrators can choose to revoke or change role assignments in the Users group, so the default assignments might be different for some organizations. Administrators can also assign permissions to individual users and groups to view and create (publish) assets in other organizations. Designer does not allow users to select an organization when they publish; it publishes using the organization to which the user belongs. As such, it is important for all collaborating Designer users working on the same project to publish to CentraSite using the same organization. Publishing using multiple organizations could lead to access problems, duplicates, and lost data.

- 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 directly.
- Reference chains in CentraSite are not fully reflected in the workspace.For example, 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 (IS) service from CentraSite, you lose the information about the relationships that Integration Server (IS) service has with other assets. If service A calls service B, and you reuse service A, you only get service A.

- CentraSite does not currently support versioning of webMethods asset types. As such, this functionality is disabled by default for these assets. Do not manually enable versioning for them in CentraSite; this will lead to unavailable assets.
- Before making a change to an asset, you might wish 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 46.

- Although you can configure Designer to automatically generate and store metadata in the workspace index, you cannot automatically publish metadata to CentraSite. You must select an asset and manually publish it. For more information, see "Publishing and Retracting Metadata for BPM and CAF Assets" on page 15 and "Publishing and Retracting Metadata for IS and TN Assets" on page 19.
- Workspace indexing is not required for publishing to CentraSite. Local (workspace) metadata about an asset is created automatically when you enable workspace indexing and is stored locally in the workspace index, which is accessible only on your computer. For more information, see "The Workspace Index" in *webMethods BPM and CAF Workspace Metadata Help*.

Registry Explorer View

The Registry Explorer view displays the contents of the CentraSite registry to which Designer is currently connected. To connect to a different CentraSite registry, you must configure it in Preferences. You can connect to only one CentraSite registry at a time, but you can configure multiple registries.

The CentraSite registry often contains a great deal of data. Designer provides a view filter for the Registry Explorer view to make it easier to locate webMethods assets.

Note: Due to limitations in the API, the webMethods Assets filter shows some non-reusable assets, like generated wrapper services and items that have been referenced but not published themselves. These are not available for use in processes. The Registry Explorer view allows you to drag them out of the view, but Designer does not allow you to drop them into any editors.

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

Note: If the CentraSite connection is disabled or not properly configured, the Registry Explorer view displays a message indicating so and a link to CentraSite preferences, where you can enable or configure the connection. For information about configuring a connection, see the *CentraSite Help*.

The following table describes the actions you can perform in the Registry Explorer view.

To...	Take this action in the Registry Explorer view...
Enable or disable the webMethods Assets filter	To enable the webMethods Assets filter, click View Menu > Configurations > webMethods Assets. Designer retains your selection in your current workspace until you change it. To disable it, select a different filter, such as Default.
Expand an asset type	The Registry Explorer view is organized by asset type. Click next to an asset type to view the assets under it.
Refresh the view	Right-click anywhere in the view and click Refresh. You may need to refresh if you publish metadata with the Registry Explorer view open. Newly published metadata will not appear in the Registry Explorer view until you refresh it. Refreshing the view collapses any currently expanded asset type.
Use an asset in one of your own projects	Drag the asset from the Registry Explorer view onto the process editor canvas for the project. When you use an asset from the Registry Explorer, you are creating a reference to that asset. You are not including the asset itself in your project; rather, you are referencing the asset based on its metadata in CentraSite. Note: The Reuse property for an asset determines whether the asset can be reused in other projects or canvases. For information about controlling the reuse of IS assets, see the *webMethods Service Development Help*.

To...	Take this action in the Registry Explorer view...
Retract metadata about an asset	Right-click the asset and click **Retract**. This removes the asset's metadata from CentraSite. **Note:** You cannot publish or retract process simulation metadata.

For more information, see:

- "Properties View" in *webMethods BPM Process Development Help*
- ”Process Simulation" in *webMethods BPM Process Simulation Help*

2 Publishing and Retracting Metadata for BPM and CAF Assets

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Publishing Metadata for Processes and CAF Applications

You can publish multiple assets at the same time. CTRL + click the assets, right-click any of them, and then click Publish.

To publish process or CAF application metadata to CentraSite

1 In the Solutions view, right-click an asset and click Publish.

2 In the Publish Assets dialog box, select the assets whose metadata you want to publish.

By default, the assets you selected will be marked for publishing to CentraSite. If you do not want metadata for an asset published, clear the check box next to the asset name.

3 Click OK.

Notes:

- If you have the Registry Explorer view open, the assets you published should appear in it when the publish operation completes. You may have to refresh the view to see the newly published assets. For more information, see "Registry Explorer View" on page 12.
- Published metadata may not be visible immediately in the Registry Explorer view or appear in searches performed immediately after publishing. Depending on the amount of metadata being published, and network and computer resources, there may be a slight lag. Generally, if you do not see published metadata within a few minutes, contact your CentraSite system administrator to check on the operation's progress.
- When a process is published, only the process is marked as *published*. The various services, processes, documents, etc. used by the process are *referenced*, not published. To search for, retract, or reuse a CentraSite asset, it must first be published. However, note that an unpublished asset can exist in the CentraSite registry as a reference.

  For example, If you publish a process (procA) and then use it in a second process (procB) but you do not publish the second process (procB), CentraSite contains one process (procA) with no references to it. You can retract that process (procA), because it is published, and it will be removed from the CentraSite registry completely. CentraSite does not keep track of whether or not an asset has been used outside of CentraSite; CentraSite only knows what has been published.

Retracting Metadata for Processes and CAF Applications

Metadata about an asset can be removed from CentraSite — this is referred to as *retracting* metadata. When you retract metadata about an asset from CentraSite, it is no longer available to other users for use in their own Designer projects.

Keep the following points in mind when retracting metadata for processes or CAF applications:

- Retracting metadata about an asset will not affect other users who have already referenced the metadata in their own projects; however, the retracted metadata will no longer be available for future referencing by other users.
- Uninstalling Integration Server can cause any published Integration Server assets to become unreferenced, or orphaned. Retract any published Integration Server assets before uninstalling the Integration Server that contains those assets.
- Problems with retracting can occur if multiple processes with multiple owners exist in a single process project, even if the users belong to the same organization. For example, if User1 publishes the process procA, the ownership of procA and its parent process project (projA) are both set to (User1). User2 publishes another process (procB) to the same process project (projA). When User1 retracts the procA, User2 cannot retract procB because User2 is not the owner of its parent process project (projA), whose only asset is now procB.
- You can publish/retract metadata for a multiple assets by pressing the CTRL or SHIFT keys while selecting assets in Solutions view.

To retract process or CAF application metadata from CentraSite

1 In the Solutions or Registry Explorer view, right-click an asset and click **Retract**.

2 In the **Retract Assets** dialog box, select the assets you want to retract.

By default, the assets you selected will be marked for retraction from CentraSite. If you do not want metadata retraced for an asset, clear the check box next to the asset name.

3 Click **OK**.

Designer retracts the assets.

If you have the Registry Explorer view open, the assets you retracted should no longer appear in it. You may have to refresh the view to see this.

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Available IS and TN Assets

You can publish and retract metadata for Integration Server (IS) assets, IS administrative assets, and Trading Networks (TN) document types to and from the CentraSite shared registry. IS administrative assets include Adapter connections, Broker connections, and JMS connection aliases. By publishing metadata, you make these assets available to other CentraSite users for activities such as search, documentation, reuse, and impact analysis.

The following table lists the Integration Server and Trading Networks assets that you can publish and retract, and how they are mapped to CentraSite assets.

Integration Server Asset	CentraSite Asset
.NET service	IS service
Adapter connection	IS connection
Adapter notification	IS type definition
Adapter service	IS service
Blaze rule service	IS service
Broker connection	IS connection
C service	IS service
Document type	IS type definition
Flat file dictionary	IS type definition
Flat file schema	IS type definition
Flow service	IS service
Integration Server	IS server
Java service	IS service
JMS connection alias	IS connection
JMS trigger	IS routing rule
Package	IS package
REST resource	IS service interface
Schema	IS type definition
Specification	IS specification
TN document type	TN document type
Web service connector	IS service
Web service descriptor	IS service interface
webMethods Messaging trigger	IS routing rule
XSLT service	IS service

Publishing and Retracting Metadata

You can publish and retract IS assets, IS administrative assets, and TN document types. Designer publishes and retracts metadata using the credentials defined for a CentraSite connection in Designer. The CentraSite URL and credentials required for a CentraSite connection are specified in Designer preferences (Window > Preferences).

Note: This method of publishing or retracting metadata is available only when using Designer 8.2 SP1 or later with Integration Server 8.2 SP1 or later.

For more information about publishing and retracting metadata, see the information in "Considerations for Publishing and Retracting Metadata" on page 21 and "Usage Notes for IS Assets" on page 27.

Note: If Designer connects to a version of Integration Server prior to version 8.5, Designer will use the CentraSite credentials defined in Integration Server for publishing metadata at the Integration Server level. For more information, see "Publishing or Retracting Metadata Using Integration Server Prior to Version 8.5" on page 30.

Considerations for Publishing and Retracting Metadata

When you publish or retract metadata for IS assets, IS administrative assets, and TN document types, keep the following points in mind:

- You must configure the CentraSite URL and credentials in the Window > Preferences page in Designer. Designer uses these credentials and URL to connect to CentraSite to publish or retract metadata.
- Integration Server must be able to resolve and access the host name defined in the CentraSite connection configuration in Designer.
- When you publish or retract metadata at the Integration Server level, Designer publishes or retracts packages as well as administrative assets. When you publish or retract metadata at the asset level, Designer publishes or retracts metadata for the selected asset only. The selected asset could be a single asset, such as a document type, or a container, such as a folder or a package.
- When publishing metadata for TN document types, you publish metadata for all TN document types on the Integration Server. When retracting metadata for TN document types, you retract metadata for all published TN document types. That is, it is not possible to publish or retract metadata for specific TN document types.
- After Designer starts a metadata operation, it executes to completion. You cannot cancel the operation.
- Only one metadata operation can run at a time.

- If you select an Integration Server for publishing or retracting metadata, Designer lists the packages and administrative assets, if any, rather than individual publishable assets. If you select a folder or package for publishing or retracting metadata, Designer lists all the publishable or retractable assets in that folder or package.
- If a folder or package contains assets that cannot be published or retracted, Designer does not list those assets in the Publish Metadata and Retract Metadata dialog boxes.
- If an asset cannot be published or retracted, the Publish and Retract commands appear but are disabled in the context menu.
- If CentraSite plug-ins are not installed in Designer, the Publish and Retract commands will not appear in the context menu.
- If Designer connects to a version of Integration Server prior to 8.2 SP1, the Metadata > Publish and Metadata > Retract commands are available only at the Integration Server level and not at the asset level.

Publishing Metadata for IS Assets or TN Document Types at the Integration Server Level

When you publish metadata by selecting the Integration Server and then selecting Publish from the context menu, you publish metadata at the Integration Server level. You can publish packages, IS administrative assets, and TN document types when publishing at the Integration Server level.

Before you publish metadata for IS or TN assets, do the following:

- Make sure the Reuse property for the asset is set to the appropriate value. The Reuse property controls whether or not a published IS asset can be reused in BPM processes or CAF projects. For more information about controlling the reuse of an IS asset, see *webMethods Service Development Help*.

  Note: The Reuse property applies only to the namespace elements in Integration Server.

- Review the information related to publishing assets mentioned in "Considerations for Publishing and Retracting IS Assets or TN Document Types at the Asset Level Using Integration Server Prior to Version 8.5" on page 34 and "Usage Notes for IS Assets" on page 27.

To publish metadata for IS assets or TN document types at the Integration Server level

1 In the Service Development perspective, in Package Navigator view, select the Integration Server that contains the assets that you want to publish.

2 Right-click the selected Integration Server and select Publish.

If a CentraSite connection is not yet configured, Designer displays the Preferences window and prompts you to configure a connection. For more information about configuring a connection, see the *CentraSite Help*.

3 In the Publish Metadata dialog box, under Select the packages to publish, do the following:

- To publish metadata for packages, select the packages that you want to publish.

  Note: Designer lists all the packages that can be published to CentraSite. You can select multiple packages by pressing the CTRL or SHIFT keys.

- To publish metadata for TN document types, select Trading Networks Document Types.

4 If you want Integration Server to automatically publish metadata for packages on which the selected packages depend, select the Auto-select package dependencies check box.

5 Click Next if you want to publish administrative assets. Otherwise, click Finish.

Note: The Next button will be disabled if there are no administrative assets to publish.

6 Under Select the administrative assets to publish, do one of the following:

- To publish all administrative assets, select the Administrative assets check box.
- To publish specific administrative assets, select the check boxes next to the administrative assets that you want to publish.

7 Click Finish.

Designer publishes the metadata and displays the progress of the operation in the Metadata Publish Status Job dialog box. To close the Metadata Publish Status Job dialog box, click Cancel. Clicking Cancel does not cancel the operation.

After publishing metadata, Designer displays a summary of the publish operation in the Published Metadata dialog box on completing the publish operation. Click OK to close the dialog box.

Retracting Metadata for IS Assets or TN Document Types at the Integration Server Level

When you retract metadata by selecting the Integration Server and then selecting Retract from the context menu, you retract metadata at the Integration Server level. You can retract metadata for packages, IS administrative assets, and TN document types when you retract metadata at the Integration Server level.

Before you retract metadata for published assets, review the information given in "Considerations for Publishing and Retracting Metadata" on page 21 and "Usage Notes for IS Assets" on page 27.

To retract metadata for IS assets or TN document types at the Integration Server level

1 In the Service Development perspective, in Package Navigator view, select the Integration Server that contains the assets that you want to retract.

2 Right-click the Integration Server and select Retract.

Note: If a configured CentraSite connection does not exist, Designer displays the Preferences window and prompts you to configure a connection. For more information about configuring a connection, see *CentraSite Help*.

If there are no metadata for packages, IS administrative assets, or TN document types to retract from CentraSite, Designer displays a message stating that there are no metadata to retract.

3 In the Retract Metadata dialog box, under Select the packages to retract, do the following:

- To retract metadata for packages from CentraSite, select the packages that you want to retract.

  Note: Designer displays all the published packages from the selected Integration Server. You can select multiple packages by pressing the CTRL or SHIFT keys.

- To retract published metadata for TN document types, select Trading Networks Document Types.

4 Click Next if you want to retract metadata for published administrative assets. Otherwise, click Finish.

Note: The Next button will be disabled if there are no published administrative assets to retract.

5 Under Select the administrative assets to retract, do one of the following:

- To retract metadata for all published administrative assets, select the Administrative assets check box.
- To retract metadata for specific administrative assets, select the check boxes next to the administrative assets that you want to retract.

6 Click Finish.

Designer retracts the metadata and displays the progress of the operation in the Metadata Retract Status Job dialog box. To close the Metadata Retract Status Job dialog box, click Cancel. Clicking Cancel does not cancel the operation.

Designer displays a summary of the retraction in the Retracted Metadata dialog box on completing the operation. Click OK to close the dialog box.

Publishing Metadata for IS Assets or TN Document Types at the Asset Level

When you publish metadata by selecting specific assets and then selecting Publish from the context menu, you publish metadata at the asset level. You can publish metadata for individual assets, such as a package, a folder, or an element to CentraSite. You can also publish metadata for TN document types collectively by selecting Trading Networks Document Types.

Note: You can only publish metadata for IS administrative assets by publishing at the Integration Server level.

To publish metadata for IS assets or TN document types at the asset level

1 In the Service Development perspective, in Package Navigator view, do the following:

- To publish metadata for a specific asset such as a package, a folder, or an element, select the asset.
- To publish metadata for TN document types, select Trading Networks Document Types.

  Note: When publishing metadata for TN document types, you must publish all available TN document types. That is, it is not possible to publish metadata for specific TN document types.

2 Right-click and select Publish.

Note: If a CentraSite connection is not yet configured, Designer displays the Preferences window and prompts you to configure a connection. For more information about configuring a connection, see the *CentraSite Help*.

3 In the Asset Publish dialog box, select the assets that you want to publish.

By default, all the assets you selected in the Package Navigator view will be marked for publishing to CentraSite. If you selected a package or folder in the Package Navigator view, Designer lists all the publishable assets in the folder or package.

- To deselect any of the selected assets, clear the check box next to the asset.
- To deselect all the selected assets, click Deselect All.
- To select an asset, select the check box next to the asset.
- To select all the assets, click Select All.

4 Click OK.

Designer publishes the metadata and displays the progress of the operation in the Metadata Publish Status Job dialog box. To close the Metadata Publish Status Job dialog box, click Cancel. Clicking Cancel does not cancel the operation.

After publishing metadata, Designer displays a summary of the publish operation in the Published Metadata dialog box. Click OK to close the dialog box.

Retracting Metadata for IS Assets or TN Document Types at the Asset Level

When you retract metadata by selecting specific assets and then selecting Retract from the context menu, you retract metadata at the asset level. You can retract metadata for individual assets, such as a package, a folder, or an element from CentraSite. You can also retract metadata for TN document types collectively by selecting Trading Networks Document Types.

Note: You can only retract metadata for IS administrative assets by retracting at the Integration Server level.

To retract metadata for IS assets or TN document types at the asset level

1 In the Service Development perspective, in Package Navigator view, do the following:

- To retract metadata for a specific asset such as a package, a folder, or an element, select the specific asset.
- To retract published metadata for TN document types, select Trading Networks Document Types.

  Note: When retracting metadata for TN document types, you must retract all published TN document types. That is, it is not possible to retract metadata for specific TN document types.

2 Right-click and select Retract.

Note: If a CentraSite connection is not yet configured, Designer displays the Preferences window and prompts you to configure a connection. For more information about configuring a connection, see the *CentraSite Help*.

If none of the assets that you selected was published to CentraSite, Designer displays a message stating that the assets do not exist in CentraSite and cannot be retracted. If you have selected multiple assets and at least one of the assets can be retracted from CentraSite, this message does not appear.

3 In the Asset Retract dialog box, select the assets that you want to retract.

By default, the assets you selected in the Package Navigator view will be marked for retraction from CentraSite. If you right-clicked a package or folder in the Package Navigator view, Designer lists all the published assets in the folder or package and selects them for retraction. You can deselect the assets that you do not want to retract.

- To deselect any of the selected assets, clear the check box next to the asset.
- To deselect all the selected assets, click Deselect All.
- To select an asset, select the check box next to the asset.
- To select all the assets, click Select All.

4 Click OK.

Designer retracts the metadata and displays the progress of the operation in the Metadata Retract Status Job dialog box. To close the Metadata Retract Status Job dialog box, click Cancel. Clicking Cancel does not cancel the operation.

Designer displays a summary of the retraction in the Retracted Metadata dialog box on completing the operation. Click OK to close the dialog box.

Usage Notes for IS Assets

Keep the following information in mind when publishing and retracting metadata for IS assets:

- You cannot retract a published asset that is referenced by another published asset until the asset that established the reference is retracted. For example, suppose that you publish a process (processA), that uses an IS service (serviceA). Then, you publish the package (packageA) that contains serviceA. Because processA depends on an asset in packageA, you can only retract packageA (and any of its contents) after you retract processA. If you change processA so that it no longer references serviceA and republish processA, you can retract packageA.
- Uninstalling Integration Server can cause any published Integration Server assets to become unreferenced, or orphaned. Retract any published Integration Server assets before uninstalling the Integration Server that contains those assets.

- If a published IS asset is in pending state in CentraSite, retracting the package that contains the IS asset results in an orphaned asset in CentraSite. For example, suppose that you published a package containing an IS service to CentraSite. If you change the life cycle state of the IS service asset to "Deploy" and then retract the package while the state change is pending, the IS service asset is not deleted when the package is retracted. The IS service asset becomes an orphaned asset in CentraSite.
- CentraSite only establishes the “Uses” relationship between the IS Service Interface asset created for a consumer Web service descriptor and the Service asset created for a web service if the Service asset exists in CentraSite before you publish the consumer Web service descriptor.

  If you create the web service asset in CentraSite by importing its WSDL after publishing the consumer Web service descriptor, republish the consumer Web service descriptor to establish the “Uses” relationship between the IS Service Interface asset created for the Web service descriptor and the Service asset created for the web service.
- You can use the scheduler capabilities within Integration Server to schedule the pub.metadata.assets:publishPackages service to publish information about Integration Server packages and administrative assets to CentraSite. The pub.metadata.assets:publishPackages service publishes metadata to CentraSite using Integration Server credentials. For more information about configuring CentraSite credentials on Integration Server, see *webMethods Integration Server Administrator's Guide*. For more information about scheduling services, see *webMethods Integration Server Built-In Services Reference*.
- To establish the correct relationships between Web service descriptors created from WSDL documents and the CentraSite Service asset, use the New wizard in Designer to create the Web service descriptor and select CentraSite as the source location. If you create a Web service descriptor from a WSDL in CentraSite through the UDDI registry or directly from a file or URL, the “Uses” and “Implements” relationships will not be established between the Web service descriptor and the CentraSite service asset.
- If you intend to change the compatibility mode of a Web service descriptor for which you published metadata to CentraSite, first retract metadata for the Web service descriptor. Next, change the compatibility mode. Finally, republish metadata for the Web service descriptor to CentraSite.

  For more information about Web service descriptors and compatibility mode, see the *webMethods Service Development Help*.
- Each asset in CentraSite has a “Deployed On” property that identifies each Integration Server from which an asset with that name has been published. However, the Integration Servers might have published different versions of the same asset or completely different assets that happen to have the same name. In CentraSite, it will appear as if both Integration Servers published the exact same asset. CentraSite will maintain the asset that was most recently published.

For example, suppose that Integration Server1 publishes a service named myService. CentraSite creates an IS service asset with the name myService and a "Deployed On" property value of Integration Server1. Later, Integration Server2 also publishes a service named myService but the service published by Integration Server2 is not identical to the service published by Integration Server1. CentraSite will update the IS service asset to represent the myService service published Integration Server2. CentraSite also updates the "Deployed On" property value to be: Integration Server1, Integration Server2. CentraSite indicates that both Integration Servers published an identical asset when, in fact, they did not.

When an Integration Server retracts an asset, CentraSite removes that Integration Server from the "Deployed On" property for the CentraSite asset. If the asset is not deployed on another Integration Server, CentraSite removes the asset. If the asset is deployed on another Integration Server, the asset remains in CentraSite. The content of the CentraSite asset will be the asset that was most recently published. This might result in a CentraSite asset whose content does not represent the IS asset that was published by the Integration Server listed in the "Deployed On" property.

To continue the above example in which Integration Server1 and then Integration Server2 published different versions of services named myService, if Integration Server2 retracts myService, CentraSite removes Integration Server2 from the "Deployed On" property value. However, the content of the myService asset in CentraSite represents the myService asset published by Integration Server2 because Integration Server2 published the asset most recently. This results in CentraSite indicating that the myService asset published by Integration Server2 is deployed on Integration Server1.

Status Information for Publish and Retract Requests

During and after execution of publish and retract requests, Designer displays status information for each package in the request and the overall request.

Status	Description
`complete`	Integration Server completed the publication or retraction request.
`error`	An error occurred while publishing or retracting the metadata. Refer to the Integration Server log for more information.
`retracting`	Integration Server is removing the assets from CentraSite. This status applies to retraction requests only.
`publishing`	Integration Server is sending the metadata to CentraSite. This status applies to publication requests only.
`starting`	Integration Server is starting the request. This is always the initial state when a request is submitted.
`counting`	Integration Server is counting the number of assets in the package or the number of TN document types.

Status	Description
`counted`	Integration Server has completed counting the number of assets in the package or the number of TN document types. The total number is displayed in the Assets column.
`extracting`	Integration Server is extracting the metadata for selected assets.

Summary Information for Publish and Retract Requests

Designer displays the following information about the metadata for IS assets, IS administrative assets, or TN document types in the Published Metadata and Retracted Metadata windows.

Column	Description
Asset	If a package was selected for metadata publication or retraction, this column displays the package name. If Trading NetworksDocument Types was selected for metadata publication or retraction, this field displays `Trading Networks Document Types`.
Status	The status of the metadata operation. For more information about status values for metadata operations, see "Status Information for Publish and Retract Requests" on page 29.

The Published Metadata and Retracted Metadata windows display the following summary information for the entire publication or retraction request:

Field	Description
Status	The overall status of the publication or retraction request.
Assets	The total number of assets processed in the publication request. This field only applies to publish requests.
Duration	The time (in hh:mm:ss) Integration Server spent executing the publication or retraction request.

Publishing or Retracting Metadata Using Integration Server Prior to Version 8.5

In versions of Integration Server prior to version 8.5 , the credentials that Designer uses to publish or retract metadata vary based on whether you are publishing or retracting at the Integration Server level or at the asset level.

- When you publish or retract metadata at the Integration Server level, Designer uses the CentraSite URL and credentials defined in Integration Server Administrator. Designer publishes and retracts metadata for all of the supported assets in the package, including the package. When publishing with Integration Server credentials, you cannot select individual IS assets for which to publish or retract metadata.

  Important! If you are using Integration Server 8.5, Designer uses the CentraSite URL and credentials defined for a CentraSite connection in Designer for publishing metadata at the Integration Server level. You can publish and retract metadata for IS administrative assets in addition to IS and TN assets in case you are using Integration Server 8.5. For more information about publishing and retracting metadata using Integration Server 8.5, see "Publishing and Retracting Metadata" on page 21.

- When you publish or retract metadata at the asset level, Designer uses the CentraSite URL and credentials defined for a CentraSite connection in Designer preferences (**Window > Preferences**). Designer publishes or retracts metadata for the selected asset only. The selected asset could be a single asset, such as a document type, or a container, such as a folder or package. This method of publishing or retracting metadata is available when using Designer 8.2 SP1 or later with Integration Server 8.2 SP1 or later.

Considerations for Publishing or Retracting Metadata at the Integration Server Level Using Integration Server Prior to Version 8.5

When you publish or retract metadata at the Integration Server level using versions of Integration Server prior to 8.5, keep the following points in mind:

- Before you can publish metadata for IS assets, the Integration Server on which the assets reside must be configured to connect to CentraSite. This is unlike publishing other webMethods assets or individual IS assets where you use CentraSite preferences in Designer to configure a connection to CentraSite.

  For information about configuring Integration Server to connect to CentraSite, refer to the PDF publication *webMethods Integration Server Administrator's Guide*.

- Because Integration Server defines the connection to CentraSite, every Designer user that publishes or retracts assets on this Integration Server uses the same set of credentials.
- Integration Server publishes or retracts metadata for the package and all of its supported contents. You cannot select individual assets for publishing or retracting.
- When publishing metadata for TN document types, you publish all TN document types on the Integration Server. When retracting metadata for TN document types, you must retract all published TN document types. That is, it is not possible to publish or retract metadata for specific TN document types.
- After Designer starts a metadata operation, it executes to completion. You cannot cancel the operation.

- Only one metadata operation can run at one time.

Publishing Metadata for IS and TN Assets at the Integration Server Level Using Integration Server Prior to Version 8.5

When you publish metadata by right-clicking the Integration Server and then selecting Publish, you publish metadata at the Integration Server level. You can publish metadata for the packages and all of its supported contents when you publish at the Integration Server level. You cannot select individual assets for publishing at the Integration Server level.

When publishing metadata for TN document types, you publish all TN document types on the Integration Server.

Before you publish metadata for an IS or TN asset, do the following:

- Make sure the Reuse property for the asset is set to the appropriate value. The Reuse property controls whether or not a published IS asset can be reused in BPM processes or CAF projects. For more information about controlling the reuse of an IS asset, see *webMethods Service Development Help*.

  Note: The Reuse property applies only to the namespace elements in Integration Server.

- Review the information related to publishing assets mentioned in "Considerations for Publishing or Retracting Metadata at the Integration Server Level Using Integration Server Prior to Version 8.5" on page 31 and "Usage Notes for IS Assets" on page 27.

To publish metadata for IS and TN assets at the Integration Server level using Integration Server prior to version 8.5

1 In the Service Development perspective, in Package Navigator view, select the Integration Server that contains the IS assets or TN document types for which you want to publish metadata.

2 Right-click and select Metadata > Publish.

3 In the Publish Metadata dialog box, do the following:

   - To publish metadata for IS assets, select the packages that contain the assets for which you want to publish metadata.
   - To publish metadata for TN document types, select Trading Networks Document Types.

4 If you want Integration Server to automatically publish metadata for packages on which the selected packages depend, select the Auto-select package dependencies check box.

5 Click OK.

Designer publishes the metadata and displays the progress of the operation in the Metadata Publish Status Job dialog box.

To close the Metadata Publish Status Job dialog box, click Cancel. Clicking Cancel does not cancel the operation.

Designer displays a summary of the publish operation in the Published Metadata dialog box.

Retracting Metadata for IS and TN Assets at Integration Server Level Using Integration Server Prior to Version 8.5

When you retract metadata by right-clicking the Integration Server and then selecting Retract, you retract metadata at the Integration Server level. You can retract metadata for published packages and all the package contents when you publish at the Integration Server level. You cannot retract metadata for individual assets when retracting at the Integration Server level.

When retracting metadata for TN document types, you must retract all published TN document types. That is, it is not possible to retract metadata for specific TN document types.

Before you retract metadata for published assets, review the information mentioned in "Considerations for Publishing or Retracting Metadata at the Integration Server Level Using Integration Server Prior to Version 8.5" on page 31 and "Usage Notes for IS Assets" on page 27.

To retract metadata for IS and TN assets at Integration Server level using Integration Server prior to version 8.5

1 In the Service Development perspective, in Package Navigator view, select the Integration Server that contains the IS assets or TN document types for which you want to retract metadata.

2 Right-click and select Metadata > Retract.

3 In the Retract Metadata dialog box, do the following:

- To retract metadata for IS assets, select the packages that contain the assets that you want to retract.

  Note: Designer displays all the published packages from the selected Integration Server. You can select multiple packages by pressing the CTRL or SHIFT keys.

- To retract metadata for TN document types, click Trading Networks Document Types.

4 Click OK.

Designer retracts the metadata and displays the progress of the operation in the Metadata Retract Status Job dialog box.

To close the Metadata Retract Status Job dialog box, click Cancel. Clicking Cancel does not cancel the operation.

Designer displays a summary of the retract operation in the Retracted Metadata dialog box.

Considerations for Publishing and Retracting IS Assets or TN Document Types at the Asset Level Using Integration Server Prior to Version 8.5

When you publish or retract metadata for IS assets and TN document types at the asset level Designer uses the CentraSite URL with credentials defined in Designer. Keep the following points in mind, before publishing metadata for specific IS assets or TN document types at the asset level:

- Before you can publish or retract metadata to CentraSite for specific assets, Designer must have a configured connection to CentraSite using CentraSite preferences in Designer (Window > Preferences). Designer uses the credentials in this configuration for connecting to CentraSite and completing the publish/retract operation.
- The publishing or retracting work is done by a connection between Integration Server and CentraSite. Integration Server must be able to resolve and access the host name defined in the CentraSite connection configuration in Designer.
- You can publish or retract metadata using the CentraSite credentials defined in Designer only when using a Designer and Integration Server are versions 8.2 SP1 or later.
- You can publish or retract metadata for a single asset or multiple IS assets. To publish or retract metadata for multiple assets, select a folder or package or press the CTRL or SHIFT keys while selecting assets in Package Navigator view.
- If you want metadata for referenced or dependent assets published/retracted as well, you must select those assets. Designer publishes or retracts metadata for selected assets only. Designer does not publish or retract metadata for assets on which a selected asset depends. For example, if serviceA invokes serviceB and only serviceA is selected for metadata publishing, Designer publishes metadata for serviceA only. Designer does not publish metadata for serviceB.
- When publishing metadata for TN document types, you publish metadata for all TN document types on the Integration Server. When retracting metadata for TN document types, you retract metadata for all published TN document types. That is, it is not possible to publish or retract metadata for specific TN document types.
- After Designer starts a metadata operation, it executes to completion. You cannot cancel the operation.

- Only one metadata operation can run at a time.

Publishing Metadata for IS Assets or TN Document Types at the Asset Level Using Integration Server Prior to Version 8.5

When you publish metadata by selecting specific assets and then selecting Publish from the context menu, you publish metadata at the asset level. You can publish metadata for individual assets, such as a package, a folder, or an element to CentraSite. You can also publish TN document types collectively by selecting Trading Networks Document Types.

Before you publish metadata for an IS or TN asset, do the following:

- Make sure the Reuse property for the asset is set to the appropriate value. The Reuse property controls whether or not a published IS asset can be reused in BPM processes or CAF projects. For more information about controlling the reuse of an IS asset, see the *webMethods Service Development Help*.
- Review the considerations for publishing assets identified in "Considerations for Publishing and Retracting IS Assets or TN Document Types at the Asset Level Using Integration Server Prior to Version 8.5" on page 34 and the information in "Usage Notes for IS Assets" on page 27.

To publish metadata for IS assets or TN document types at the asset level using Integration Server prior to version 8.5

1 In the Service Development perspective, in Package Navigator view, do the following:
   - To publish metadata for an IS asset, right-click the asset.
   - To publish metadata for TN document types, right-click the Trading NetworksDocument Types.

   Note: When publishing metadata for TN document types, you must publish all available TN document types. That is, it is not possible to publish metadata for specific TN document types.

2 Click Publish.

   If a CentraSite connection is not yet configured, Designer displays the Preferences window and prompts you to configure a connection. For more information about configuring a connection, see the *CentraSite Help*.

   Note: If an asset cannot be published to CentraSite, the Publish command appears in the context menu, but is disabled. If CentraSite plug-ins are not installed in Designer or if Designer connects to a version of Integration Server prior to 8.2 SP1, the Publish command will not appear in the context menu.

3 In the Asset Publish dialog box, select the assets whose metadata you want to publish.

By default, the assets you selected will be marked for publishing to CentraSite. If you selected a folder or package, the Asset Publish dialog box lists all of the publishable assets in that folder or package and marks them for publishing. If you do not want metadata published for an asset, clear the check box next to the asset name.

Note: If you selected a folder or package for publishing and the folder or package contains assets that cannot be published, Designer does not list those assets in the Asset Publish dialog box.

4 Click OK.

Designer publishes the metadata and displays the progress of the operation in the Metadata Publish Status Job dialog box.

To close the Metadata Publish Status Job dialog box, click Cancel. Clicking Cancel does not cancel the operation.

Designer displays a summary of the publish operation in the Published Metadata dialog box.

Retracting Metadata for IS Assets and TN Document Types at the Asset Level Using Integration Server Prior to Version 8.5

When you retract metadata by selecting specific assets and then selecting Retract from the context menu, you retract metadata at the asset level. You can retract metadata for individual assets, such as a package, a folder, or an element from CentraSite. You can also retract metadata for TN document types collectively by selecting Trading Networks Document Types.

Before you retract metadata for published assets, make sure to review the considerations identified in "Considerations for Publishing and Retracting IS Assets or TN Document Types at the Asset Level Using Integration Server Prior to Version 8.5" on page 34 and the information in "Usage Notes for IS Assets" on page 27.

To retract metadata for IS assets or TN document types at the asset level using Integration Server prior to version 8.5

1 In the Service Development perspective, in Package Navigator view, do the following:

- To retract metadata for an IS asset, right-click the asset.
- To retract metadata for TN document types, right-click the Trading NetworksDocument Types package.

Note: When retracting metadata for TN document types, you must retract all published TN document types. That is, it is not possible to retract metadata for specific TN document types.

2 Select Retract.

If a configured CentraSite connection does not exist, Designer displays the Preferences window and prompts you to configure a connection. For more information about configuring a connection, see *CentraSite Help*.

Note: If an asset cannot be retracted from CentraSite, the Retract menu command appears, but is disabled. If CentraSite plug-ins are not installed in Designer or if Designer connects to a version of Integration Server prior to 8.2 SP1, the Publish command will not appear in the context menu.

3 In the Asset Retract dialog box, select the assets whose metadata you want to retract.

By default, the assets you selected will be marked for retraction from CentraSite. If you selected a folder or package, the Asset Retract dialog box lists all of the retractable assets in that folder or package and marks them for retraction. If you do not want metadata retraced for an asset, clear the check box next to the asset name.

Note: If you selected a folder or package for publishing and the folder or package contains assets that cannot be retracted, Designer does not list those assets in the Asset Retract dialog box.

Note: If an asset cannot be retracted because its metadata was never published to CentraSite, Designer displays a message to that effect.

4 Click OK.

Designer retracts the metadata and displays the progress of the operation in the Metadata Publish Status Job dialog box.

To close the Metadata Retract Status Job dialog box, click Cancel. Clicking Cancel does not cancel the operation.

Designer displays a summary of the publish operation in the Retracted Metadata dialog box.

4 CentraSite Metadata Search

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webMethods 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 "About Metadata in CentraSite" on page 10, as well as "Metadata in Your Workspace" in *webMethods BPM and CAF Workspace Metadata Help*.

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 directly. Additionally, reference chains in CentraSite are not fully reflected in the workspace.For example, 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 (IS) service from CentraSite, you lose the information about the relationships that Integration Server (IS) 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 for which there is no or incomplete metadata. In this case, the search will not properly locate these assets. For more information, see "Enabling or Disabling Workspace Indexing" in the PDF publication *webMethods BPM and CAF Workspace Metadata Help*.

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.

Type of Search	How to Access...	Description
Advanced search	webMethods Advanced tab in the Search window	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. 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". In both webMethods basic and advanced searches, you can locate all assets of a particular type by selecting the asset and specifying no search criteria.
Saved searches	Saved Searches view	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. 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. 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.

Performing webMethods 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 "Registry Explorer View" on page 12 and "The Workspace Index" in *webMethods BPM and CAF Workspace Metadata Help*.

Note: If you have workspace indexing disabled now or had it disabled in the past, you might have assets in your workspace for which there is no or incomplete metadata. In this case, the search will not properly locate these assets. For more information, see "Enabling or Disabling Workspace Indexing" in the PDF publication *webMethods BPM and CAF Workspace Metadata Help*.

To perform a basic search for webMethods assets

1 In Designer, select Search > Search .

The webMethods tab has focus by default.

Selections from the previous search are retained.

2 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.

3 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.

4 In the Search in field, click:

- 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.

5 Click Search.

Performing webMethods 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 (IS) document types, but not both portlets and Integration Server (IS) 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 "Working with CentraSite Metadata" on page 11.

Note: If you have workspace indexing disabled now or had it disabled in the past, you might have assets in your workspace for which there is missing or incomplete metadata. In this case, the search will not properly locate these assets. For more information, see "Enabling or Disabling Workspace Indexing" in the PDF publication *webMethods BPM and CAF Workspace Metadata Help*.

To perform an advanced search for webMethods assets

1 In Designer, select Search > 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 47.

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, select 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.

For more information about each of these options, see the Eclipse documentation.

3 Click Apply to apply your changes without closing the Preferences window.

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

For more information, see "Metadata in Your Workspace" in *webMethods BPM and CAF Workspace Metadata Help*.

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 Show Dependencies, and to see what your one service refers to, you can 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 47.

The table below lists the actions you can take from the Search view.

Action	Description
View dependencies of an asset	Right-click a row in the Search view. Select **Show Dependencies** > **In CentraSite** or **Show Dependencies** > **In Workspace**. For more information, see "Showing Asset References and Dependencies" on page 47. **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. For more information, see "Enabling or Disabling Workspace Indexing" in the PDF publication *webMethods BPM and CAF Workspace Metadata Help*.
View references of an asset	Right-click a row in the Search view. Select **Show References** > **In CentraSite** or **Show References** > **In Workspace**. For more information, see "Showing Asset References and Dependencies" on page 47. **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. For more information, see "Enabling or Disabling Workspace Indexing" in the PDF publication *webMethods BPM and CAF Workspace Metadata Help*.
Add an item in the search results to the process editor's canvas	Select a row in the search results and drag it on to the process editor's canvas. **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. **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.
Show Next Match	Selects the next item in the search results.
Show Previous Match	Selects the previous item in the search results.

Action	Description
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.
Run the Current Search Again	Repeats the current search to reflect changes to results.
Cancel Current Search	Cancels the current search.
Show Previous Searches	Browse previously conducted searches and repeat a previous search. Shows previous searches and allows you to select one. Select ▾ Show Previous Searches Menu to see a list of the most recent searches. Select one to run again. Select ▾ Show Previous Searches Menu > History to see the history of your previous searches. Select ▾ Show Previous Searches Menu > Clear History to remove all previous search history information, including the one currently displayed.
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.

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 (see "The Workspace Index" in *webMethods BPM and CAF Workspace Metadata Help*). 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.

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 for which there is no or incomplete metadata. In this case, Designer might not show all references or dependencies. For more information, see "Enabling or Disabling Workspace Indexing" in the PDF publication *webMethods BPM and CAF Workspace Metadata Help*.

To show the references or dependencies of an asset

1. In the Solutions or Search view, right-click the asset for which you want to view references or dependencies.
2. Select Show References or Show References and then:
   - In CentraSite to show assets found in CentraSite.
   - In Workspace to show assets 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 dependencies 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.

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.

webMethodsPredefinedSaved 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 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).
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.

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.

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, open 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, select:

- 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, open 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 for which there is no or incomplete metadata. In this case, the search will not properly locate these assets. For more information, see "Enabling or Disabling Workspace Indexing" in the PDF publication *webMethods BPM and CAF Workspace Metadata Help*.

To execute a saved search

1 In Designer, if the Saved Searches view is not visible, open 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 a saved search to execute it.

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, open 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, open 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 allows any entry in the Provide the Attribute Name to Search box, the attribute must exist in the Web service taxonomy to return search 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, open 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, open 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 dialog box, browse to and select the XML file that contains the exported saved searches you want to import.

4 Click Open.