

# CentraSite

## Taxonomies

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## Table of Contents

Preface .....	v
1 Introduction .....	1
2 Who Can Create and Manage Taxonomies? .....	3
3 Visibility of Taxonomies in CentraSite Control .....	5
4 Creating a Taxonomy .....	7
5 Associating Taxonomy to an Object Type .....	9
6 Setting Permissions on a Taxonomy .....	11
7 Viewing the Taxonomy List .....	13
8 Viewing or Editing the Properties of a Taxonomy .....	15
9 Deleting a Taxonomy .....	17
10 Adding a Category .....	19
11 Viewing or Editing the Properties of a Category .....	21
12 Deleting a Category .....	23



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# Preface

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This document provides information about how to create and modify taxonomies (classification schemes).

The content is organized under the following sections:

<b>Introduction</b>	Gives an overview of the taxonomy support in CentraSite.
<b>Who Can Create and Manage Taxonomies?</b>	Describes the permissions needed to create, edit, or delete a taxonomy.
<b>Visibility of Taxonomies in CentraSite Control</b>	Describes properties that determine whether a taxonomy is visible to users in CentraSite Control.
<b>Creating a Taxonomy</b>	Describes how to create a taxonomy.
<b>Associating Taxonomy to an Object Type</b>	Describes how to associate a taxonomy with one or multiple object type(s).
<b>Setting Permissions on a Taxonomy</b>	Describes how to set instance-level permissions on a taxonomy.
<b>Viewing the Taxonomy List</b>	Describes how to view the list of taxonomies in CentraSite.
<b>Viewing or Editing the Properties of a Taxonomy</b>	Describes how to modify a taxonomy.
<b>Deleting a Taxonomy</b>	Describes how to delete a taxonomy.
<b>Adding a Category</b>	Describes how to add a category to a taxonomy.
<b>Viewing or Editing the Properties of a Category</b>	Describes how to modify a category in a taxonomy.
<b>Deleting a Category</b>	Describes how to delete a category from a taxonomy.

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# 1 Introduction

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A *taxonomy* categorizes assets in CentraSite so that a consumer can search for assets within a particular category. CentraSite provides several predefined taxonomies, which are available to all users. Additionally, you can create custom taxonomies to suit your business needs and subdivide them by creating *categories*. Categories help consumers locate assets more easily. For example, if you are offering assets to help your consumers better manage their finances, classifying your assets under "personal banking" or "money management" might help them locate your assets more easily.



## 2 Who Can Create and Manage Taxonomies?

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To create taxonomies, you must belong to a role that has the "Manage Taxonomies" permission. Besides allowing you to create taxonomies, this permission allows you to edit and delete any user-defined taxonomy (the predefined taxonomies provided by CentraSite can be modified in certain ways, but cannot be deleted). By default, users in the CentraSite Administrator or Asset Type Administrator role have this permission, although an administrator can grant this permission to other roles.

If you do not belong to a role that includes the "Manage Taxonomies" permission, you can edit and delete a taxonomy if:

- You have the appropriate instance-level permissions (i.e., Modify or Full permission) on the taxonomy.

—AND—

- You belong to a role that includes the "Use the Administration UI" permission.

For more information about permissions, see the section *About Roles and Permissions* in the document *Users, Groups, Roles and Permissions*.

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# 3

## Visibility of Taxonomies in CentraSite Control

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All users have implicit (and irrevocable) view permission on taxonomies. Broadly speaking, this permission enables any user to access any taxonomy for the purpose of classifying or filtering registry objects. However, taxonomies have the following additional properties that control whether they are visible to users within the CentraSite Control user interface.

Property	Description
<b>Taxonomy is Browsable</b>	<p>Determines whether the taxonomy appears in the taxonomy lists that CentraSite Control displays to users for the purposes of classifying or filtering objects. If this property is enabled for a taxonomy, CentraSite Control includes the taxonomy in the following lists:</p> <ul style="list-style-type: none"><li>■ The <b>Browse by</b> list in the <b>Asset Catalog &gt; Browse</b> page.</li><li>■ The <b>Add Classification</b> dialog box displayed from the <b>Classification</b> profile.</li></ul> <p>The <b>Taxonomy is Browsable</b> property is an attribute that you set when you create a taxonomy. You might disable this property, for example, if a taxonomy is intended to be used to classify objects programmatically (e.g., using a policy). Doing this will prevent end users from using the taxonomy to classify assets using the <b>Classification</b> profile in CentraSite Control.</p> <p>You can also use this property to suppress the display of the predefined taxonomies that CentraSite installs. For example, if your site has no need to use the NAICS taxonomies provided by CentraSite, you can eliminate them from the taxonomy lists displayed in CentraSite Control by disabling their <b>Taxonomy is Browsable</b> property.</p>
<b>Applicable to Object Types</b>	<p>When a taxonomy is browsable (i.e., when its <b>Taxonomy is Browsable</b> property is enabled), the <b>Applicable to Object Types</b> property determines for which object types the taxonomy will be shown. For example, if you specify that a taxonomy is not applicable to XML Schemas, CentraSite Control will not include the taxonomy in the taxonomy lists that users see when they add classifiers to XML Schemas.</p>

Property	Description
<b>Internal</b>	<p>Indicates whether a taxonomy is meant to for use by end users. Taxonomies that are <i>internal</i> are designed to support CentraSite's own internal processes and are, therefore, suppressed from most taxonomy lists displayed in CentraSite Control.</p> <p>A taxonomy's Internal property cannot be assigned or viewed through CentraSite Control. It can only be accessed through the API.</p>

# 4 Creating a Taxonomy

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Perform these steps to create a taxonomy and save it to CentraSite.

▶ **To create a taxonomy**

- 1 In CentraSite Control, go to **Administration > Taxonomies**.
- 2 In the **Taxonomies** page, click **Add Taxonomy**.
- 3 In the **Add Taxonomy** page, specify the following fields:

In this field...	Specify...
<b>Name</b>	A name for the taxonomy.  Be aware that this is the name that users will see when they search for assets using the Browse catalog page. The name should be meaningful (for example, "Software AG ASIA-PAC", not "SAG-AP").  <b>Note:</b> A taxonomy name does not need to be unique within CentraSite. However, to reduce ambiguity, you should avoid giving multiple taxonomies the same name.
<b>Description</b>	<i>Optional.</i> A descriptive comment for the taxonomy.
<b>Documentation</b>	<i>Optional.</i> Specify a file that contains additional external documentation for this taxonomy. You can use the <b>Browse</b> button for this field to locate the file.
<b>Taxonomy is browsable</b>	<i>Optional.</i> Whether you want the taxonomy to be visible to users for filtering and classification purposes in CentraSite Control. For more information about this property, see <a href="#">Visibility of Taxonomies in CentraSite Control</a> .
<b>Icon</b>	<i>Optional.</i> The location of a bitmap file that contains an icon that will be displayed in the user interface to identify this new taxonomy. The bitmap format must be either JPG, GIF or PNG; it must be 16x16 pixels, to match the size of the existing taxonomies.

- 4 Specify the object types that are allowed to use the taxonomy for association purposes. You do this by selecting the tab **Applicable to Object Types** and marking the check boxes of the required object types. For information about associating object types to a taxonomy, see [Associating Taxonomy to an Object Type](#).
- 5 To enable other users to view, modify and/or delete a taxonomy that you have created, you must modify the taxonomy's permission settings. You do this by selecting the tab **Permissions** and making the appropriate entries there. For information about allowing other users to access a taxonomy, see [Setting Permissions on a Taxonomy](#).
- 6 Click **Save**.

When you return to the **Taxonomies** page, the new taxonomy is visible in the list.

# 5

## Associating Taxonomy to an Object Type

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You can associate a taxonomy to multiple object types. When you do this, you can classify objects of the specified type by the associated taxonomy.

▶ **To associate a taxonomy to an object type**

- 1 In CentraSite Control, go to **Administration > Taxonomies**.
- 2 In the **Taxonomies** page, click the name of the taxonomy that you want to associate with the object types.
- 3 In the Edit Taxonomy page, select the **Applicable to Object Types** tab. Select the object types that you want to associate with the taxonomy.

When associating the taxonomy with object types, keep the following points in mind:

- You can either mark the check boxes for the object types individually, or select them all by checking the **All Object Types** check box.
- By default, CentraSite displays the **All Object Types** check box as "selected". When this check box is selected, the check boxes for the list of object types are automatically displayed as "selected" and "disabled".

This default selection does not associate the taxonomy with the selected object types. Instead, it only allows the taxonomy to be applied to the selected object types (that is, CentraSite allows you to classify the selected object types using the taxonomy).

- If you unmark the **All Object Types** check box, and mark ALL of the object types as "selected", then there does not exist an association, and the taxonomy is applicable to all of the selected object types.
- If you unmark the **All Object Types** check box and the list of ALL the object types, then there does not exist an association, and the taxonomy is still applicable to all the object types.
- Therefore, to associate a taxonomy with one or more object types, you **MUST**:

1. Unmark the **All Object Types** check box.
  2. Manually select the check box(es) of the object types that you want to associate with the taxonomy.
- 4 Click **Save**.

# 6 Setting Permissions on a Taxonomy

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All CentraSite users are permitted to view the taxonomies that you create. However, only you (as the owner of the taxonomy) and users who belong to a role with the "Manage Taxonomies" permission are allowed to modify or delete these taxonomies. To enable other users to modify and/or delete a taxonomy that you have created, you must modify the taxonomy's instance-level permission settings.

The following procedure describes how to set permissions on a taxonomy. When setting permissions on taxonomies, keep the following points in mind:

- To set permissions on a taxonomy, you must belong to a role that has the "Manage Taxonomies" permission or have the Full instance-level permission on the taxonomy itself.
- You can assign permissions to any individual user or group defined in CentraSite.
- The groups to which you can assign permissions include the following system-defined groups:

Group Name	Description
<b>Users</b>	All users within a specified organization.
<b>Members</b>	All users within a specified organization and its child organizations.
<b>Everyone</b>	All users of all organizations and child organizations, <i>including guest users</i> (if your CentraSite permits access by guests).

- If a user has multiple permission assignments, the user receives the union of all the assignments. For example, if group A has Modify permission on a taxonomy and group B has Full permission on the same taxonomy, users that belong to both groups will, in effect, receive Full permission on the taxonomy.

▶ **To assign permissions to a taxonomy**

- 1 Display the details page for the taxonomy whose permissions you want to edit. If you need procedures for this step, see [Viewing or Editing the Properties of a Taxonomy](#).
- 2 In the Edit Taxonomy page, select the **Permissions** tab.
- 3 To add users or groups to the **Users/Groups** list, do the following:
  1. Click **Add Users/Groups**.
  2. Select the users and groups to which you want to assign permissions.

If you want to filter the list, type a partial string in the **Search** field. CentraSite applies the filter to the **User/Group** column.

String	Description
b	Displays names that contain "b".
bar	Displays names that contain "bar".
%	Displays all users and groups.

3. Click **OK**.
- 4 Use the **View**, **Modify**, and **Full** check boxes to assign specific permissions to each user and group in the **Users/Groups** list as follows:

Permission	Allows the selected user or group to...
<b>View</b>	View the taxonomy.  <b>Note:</b> Disabling this permission will not prevent a user from accessing the taxonomy. CentraSite implicitly grants users view permission on all taxonomies. The implicit permission granted by CentraSite is not revoked by disabling the <b>View</b> permission on this tab.
<b>Modify</b>	View and edit the taxonomy.
<b>Full</b>	View, edit, and delete the taxonomy. This permission also allows the selected user or group to assign instance-level permissions to the taxonomy.

- 5 Click **Save** to save the new permission settings.



**Note:** If you have given users **Modify** or **Full** permission on the taxonomy, and you want them to be able to work with the taxonomy in CentraSite Control, be sure the users belong to a role that has the "Use the Administration UI" permission.

# 7 Viewing the Taxonomy List

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You use the Taxonomies page to view the list of taxonomies on CentraSite. By default, this list displays all "browsable" taxonomies that are defined. To display all taxonomies, enable the **Show all Taxonomies** option.

▶ **To view the taxonomies list**

- 1 In CentraSite Control, go to **Administration > Taxonomies** to view the list of taxonomies.
- 2 Select the **Show all Taxonomies** check box to view the complete list of user accessible taxonomies. (This list does not include taxonomies that CentraSite uses to support its own internal processes and are not meant to be used or modified by end users.)
- 3 The Taxonomies page list provides the following information about each taxonomy:

Column	Description
<b>Taxonomies</b>	The name of the taxonomy.
<b>Description</b>	A short description about the taxonomy.



# 8

## Viewing or Editing the Properties of a Taxonomy

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You use the **Edit Taxonomy** page to examine and/or modify the properties of a taxonomy.

▶ **To modify a taxonomy**

- 1 In CentraSite Control, go to **Administration > Taxonomies**.
- 2 In the **Taxonomies** page, click the name of the taxonomy whose details you want to modify.
- 3 Examine or modify the properties on the Edit Taxonomy page as required.
- 4 Click **OK**.



# 9

## Deleting a Taxonomy

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Deleting a taxonomy permanently removes the taxonomy from the CentraSite. When you delete a taxonomy keep the following points in mind:

- Before you attempt to delete a taxonomy, you must delete all of the categories underneath it.
- You cannot delete a taxonomy if it is currently used to classify one or more objects.
- You are not allowed to delete the predefined taxonomies provided by CentraSite (not even if you belong to a role with "Manage Taxonomies" permission).

### ▶ To delete a taxonomy

- 1 In the CentraSite Control, go to **Administration > Taxonomies** to display the taxonomies list.
- 2 Enable the checkbox next to the name of the taxonomy that you want to delete.
- 3 Click **Delete**.

When you are prompted to confirm the delete operation, click **OK**.

You can delete multiple taxonomies in a single step. The rules described above for deleting a single taxonomy apply also when deleting multiple taxonomies.

 **Important:** If you have selected several taxonomies where one or more of them are predefined taxonomies, you can use the **Delete** button to delete the taxonomies. However, as you are not allowed to delete predefined taxonomies, only taxonomies you have permission for will be deleted. The same applies to any other taxonomies for which you do not have the required permission.

### ▶ To delete multiple taxonomies in a single operation

- 1 In CentraSite Control, go to **Administration > Taxonomies** to display the taxonomies list.
- 2 Mark the checkboxes of the taxonomies that you want to delete.

- 3 From the **Actions** menu, choose **Delete**.

When you are prompted to confirm the delete operation, click **OK**.

# 10 Adding a Category

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You can subdivide a taxonomy by creating categories and subcategories. When creating categories, keep the following points in mind:

- The **Add Category** context menu is visible for the following conditions:
  - If the taxonomy has already been categorized with one or more child taxonomies (categories).
  - If the taxonomy does not have a child category and has NEVER been classified for any of its applicable object types.
- The **Add Category** context menu is NOT visible for the following conditions:
  - If the taxonomy does not include a child category and is classified for at least one of its applicable object types.
  - If the taxonomy and it's category are classified for at least one applicable object type.
  - If the taxonomy is related to any one of the lifecycle model.

You use the following procedure to add a category.

## ▶ To add a category

- 1 In CentraSite Control, go to **Administration > Taxonomies**.
- 2 In the **Taxonomies** page, locate the custom taxonomy you want to categorize.
- 3 In the context menu of the taxonomy, choose **Add Category**.
- 4 In the **Add Category** dialog box, specify the following fields:

In this field...	Specify...
<b>Name</b>	<p>A name for the category.</p> <p>Be aware that this is the name that users will see in the taxonomy hierarchy when they view assets using the Browse page. The name should be meaningful (for example, "Business Application Systems", not "BAS").</p> <p><b>Note:</b> A category name does not need to be unique within the taxonomy. However, to reduce ambiguity, you should avoid giving multiple categories the same name.</p>
<b>Description</b>	<p><i>Optional.</i> A descriptive comment for the category.</p>
<b>Icon</b>	<p><i>Optional.</i> The location of a bitmap file that contains an icon that will be displayed in the user interface to identify this category. The bitmap format must be either JPG, GIF or PNG; it should be 16x16 pixels, to match the size of the existing categories.</p>

5 Click **OK**.

You can expand and collapse the display of the category names by choosing the triangle icon beside the taxonomy name.

# 11

## Viewing or Editing the Properties of a Category

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Use the following procedure to view or modify a category.

▶ **To modify a category**

- 1 In CentraSite Control, go to **Administration > Taxonomies**.
- 2 In the **Taxonomies** page, locate the taxonomy that contains the category you want to modify.
- 3 Ensure that the taxonomy's categories are visible by choosing the triangle icon beside the taxonomy name.
- 4 Locate the category that you wish to modify, and choose **Details** in its context menu.
- 5 In the **Edit Category** dialog box, change the category's details as required
- 6 Click **OK**.



# 12

## Deleting a Category

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Use the following procedure to delete a category from a taxonomy. When deleting a taxonomy's categories, keep the following points in mind:

- To delete a category, you must first delete all of the sub-categories underneath it.
- You cannot delete a category if objects are currently classified by the category.
- You cannot delete categories from the predefined taxonomies provided by CentraSite (not even if you belong to a role with "Manage Taxonomies" permission).

You use the following procedure to delete a category.

### ▶ To delete a category

- 1 In CentraSite Control, go to **Administration > Taxonomies**.
- 2 In the **Taxonomies** page, locate the taxonomy that contains the category you want to modify.
- 3 Ensure that the taxonomy's categories are visible by choosing the triangle icon beside the taxonomy name.
- 4 Locate the category that you wish to delete, then choose **Delete**. You can select multiple categories for deletion.

When you are prompted to confirm the deletion, click **OK**.

