

## CentraSite

### Managing Users and Organizations

Version 9.6

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

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# Preface

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This document describes how to create and manage CentraSite organizations.

The content is organized under the following sections:

<b>Introduction</b>	Gives an overview of the organization support in CentraSite.
<b>Basic Organization Structure</b>	Describes the structure of an organization.
<b>Planning Your Organization Structure</b>	Describes the planning of an organization.
<b>Who Can Create and Manage Organizations?</b>	Describes who can create and manage organizations.
<b>Organization Administrators and Primary Contacts</b>	Describes these two key positions within an organization.
<b>Adding a Top-Level Organization</b>	Describes how to create an organization.
<b>Viewing or Editing the Properties of an Organization</b>	Describes how to view or edit an organization.
<b>Adding a Child Organization to an Organization</b>	Describes how to create a child organization.
<b>Deleting an Organization</b>	Describes how to delete an organization.

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# 1 Introduction

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The *SOA Governance* framework of CentraSite:

- Enables organizations to realize the full potential of Service Oriented Architecture.
- Structures organizations with authorized users, policy definitions and reusable assets.
- Enforces, across organizations, the policies that define the rules and regulations under which an organization functions, as well as the processes that ensure compliance.

Broadly speaking, an *organization* represents an entity that owns a particular collection of assets. Within a CentraSite registry, any object that is not an organization belongs to an organization. In this respect, organizations enable you to partition your registry into autonomous collections of objects that can be administered independently.

Typically, you define organizations that represent actual entities within your enterprise, such as functional lines of business, regional subsidiaries or branches, legal entities, B2B partners (e.g., suppliers and customers), projects or departments. You can define parent-child associations between organizations to model the hierarchical structure of entities in your enterprise.

Organizations also function as a scoping mechanism for the following registry functions:

- Role-based permissions
- Lifecycle models
- Design/change-time policies
- Supporting documents

For example, organizations enable administrators to create lifecycle models and design/change-time policies that apply only to the assets that belong to their organization.



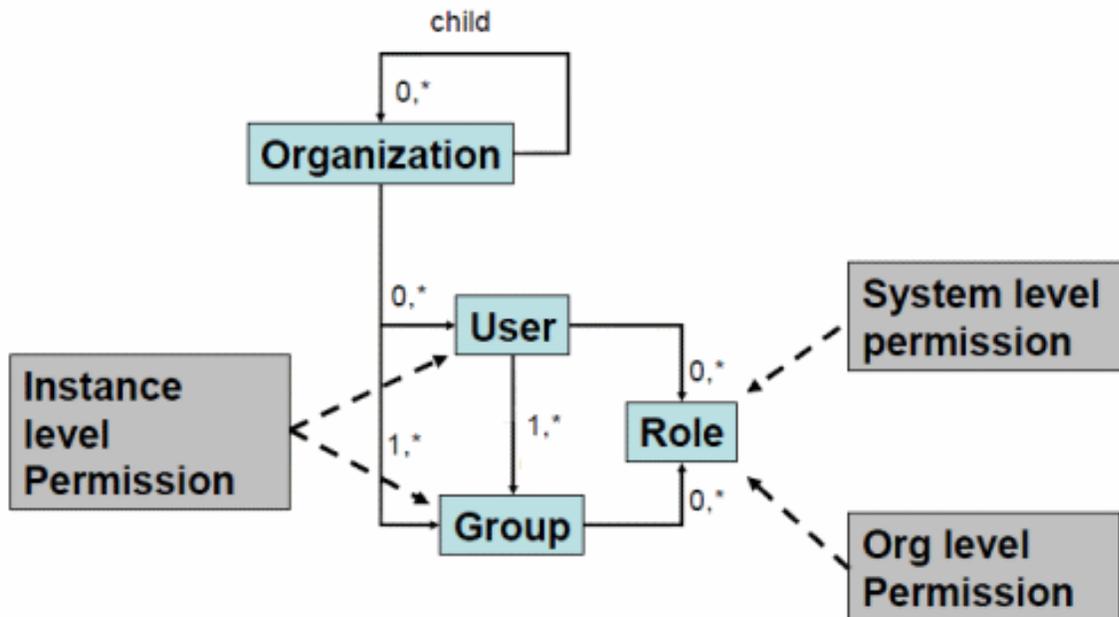
# 2 Basic Organization Structure

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An organization functions as a high-level container for a set of users and the assets that they own. The users that belong to an organization are permitted to access all of the organization's assets. If other users require access to the organization's assets, they must obtain explicit permissions to do so.

An organization is composed of users, groups, roles and permissions.



- An organization can have zero or more *child organizations*. Each child organization is a separate organization in its own right and has its own set of users, groups, roles and permissions.
- An organization can have one or more *users*. A user represents an individual who is an authorized user of CentraSite. Users are identified by a unique ID known to the external authentication system that CentraSite is configured to use. *A user can belong to only one organization.*
- An organization has one or more *groups*. A group represents a set of users. Groups enable you to collectively apply permissions and other capabilities to a specified set of users. All organizations include the following predefined groups:

Group	Description
Users	All users belonging to the organization. The API requires all organizations to have this group.
Members	All users belonging to the organization or any of its descendants (i.e., children, children's children, and so forth).

- An organization has one or more *roles* that can be assigned to users or groups. By default, each organization includes the following set of roles: Organization Administrator, Policy Adminis-

trator, Asset Administrator, Asset Provider and Asset Consumer. A role is a collection of *system-level permissions* and/or *organization-level permissions*. These permissions enable users to work with specific types of objects or perform certain tasks. Roles can be assigned to individual users or to groups. The assignment of a role confers the permissions in the role upon the assigned user or group.

- *Instance-level permissions* are used to give specific users or groups access to individual assets or registry objects. They enable you to apply very fine-grain access controls to the assets in your organization.

## The Default Organization

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CentraSite is installed with one predefined organization called *Default Organization*. The default organization owns the system-defined registry objects that CentraSite uses. You cannot delete the Default Organization, nor can you rename it.

As a best practice, you should avoid using the default organization as an ordinary organization. Instead, treat it as the "home" for system-wide objects such as asset types, taxonomies, targets and system-wide policies, and restrict membership in this organization to a small number of administrative users.

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## Planning Your Organization Structure

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To capitalize on CentraSite's governance capability, you must plan and create your organization structure. Doing this involves the following high-level steps:

1. Create an organization and assign an administrator for the organization. For procedures, see *Adding an Organization*.
2. Create child organizations to represent different divisions or departments in your organization. For procedures, see *Adding a Child Organization*.
3. Create users for your organization. For procedures, see the topic *Adding a User* in the section *About Users* in the document *Users, Groups, Roles and Permissions*.
4. Create groups for your organization. For procedures, see the topic *Creating Custom Groups* in the section *About Groups* in the document *Users, Groups, Roles and Permissions*.
5. Assign roles to users and groups to specify the level of access they will have to various objects related to the organization. For procedures, see the section *Assigning Roles to a User* and *Assigning Roles to a Group* in the appropriate section *About Users* or *About Groups* in the document *Users, Groups, Roles and Permissions*.
6. Define taxonomies for organizing assets and classifying assets. For procedures, see the section *Creating a Taxonomy* in the document *Taxonomies* .
7. Create design/change-time policies for management of CentraSite objects such as organizations, users, taxonomies, lifecycle models, assets, policies and report templates. For information about creating policies, see the topic *Adding a Design/Change Time Policy to CentraSite* in the section *Functional Scope* in the document *Working with Design/Change-Time Policies*.
8. Create lifecycle models that define the states that make up the lifecycles of assets and other objects associated with your organizations. For procedures, see the document *Customizing Lifecycle Management*.

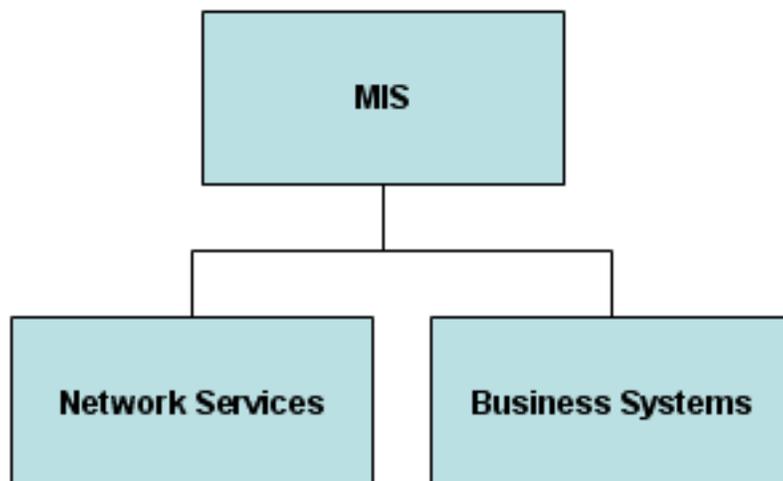


## 4 Who Can Create and Manage Organizations?

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To create and manage (i.e., view, edit and delete) a top-level organization (i.e., an organization that is a sibling of the Default Organization), you must belong to a role that has the "Manage Organizations" system-level permission. By default, users with the CentraSite Administrator role have this permission, and can assign this permission to other roles. Besides allowing you to create organizations at the top level, the "Manage Organizations" permission enables you to manage *all* organizations (including the Default Organization). This permission allows you to create, view, edit and delete virtually any object within any organization.

To create child organizations from an organization, you must belong to a role that has either the "Manage Organizations" permission for the organization in which you want to create the child organization or that permission for one of that organization's antecedents. For example, if you create an organizational structure that looks like the one below, you can create a child organization under the Business Systems organization if you have the "Manage Organizations" permission for the Business Systems organization *or* for the MIS organization.



When you have "Manage Organizations" permission for an organization, you can edit an organization's attributes and manage that organization's registry objects (including all of its children and their registry objects). In effect, the "Manage Organizations" permission allows you to create, view, edit and delete virtually any object within an organization or its descendants. By default, users in the Organization Administrator role for an organization have this permission, although an administrator can assign this permission to other roles.

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## Organization Administrators and Primary Contacts

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When you create an organization, you must specify a user to serve as the organization's *organization administrator* and a user to serve as the organization's *primary contact*.

- *The organization administrator* is a user that has the Organization Administrator role for the organization. An organization must have at least one user in the Organization Administrator role. It can have multiple users in this role. A user in one organization can serve as an Organization Administrator for another organization; however, this role is typically given to someone within the organization. An organization administrator performs administrative tasks for the organization, such as:
  - Adding users to the organization
  - Defining groups and roles
  - Defining custom lifecycle models for the organization
  - Creating child organizations

An organization administrator can also view, edit and delete any asset, policy or lifecycle model that belongs to the organization or any of its descendants.

- *The primary contact* is simply a user who acts as the point-of-contact for an organization. An organization has just one primary contact. The user who is designated as the primary contact does not receive any additional roles or permissions by serving as the primary contact; this user is simply designated as the individual who serves as the main point-of-contact for the organization. Usually, the same user serves as both the organization's administrator and its primary contact, but CentraSite does not require this. You can assign a different user to each position. The primary contact is not required to be a user within the organization itself, but usually this is the case.



# 6 Adding a Top-Level Organization

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Initially, the only organization that CentraSite contains is the "Default Organization". You use the following procedure to create other top-level organizations (i.e., organizations that are siblings of the Default Organization).

When you add a new organization to CentraSite, CentraSite creates the new organization in the registry and populates the organization with a set of default objects (roles, users, policies, a folder in the supporting document library, and so forth).

▶ **To create an organization**

- 1 In CentraSite Control, go to **Administration > Organizations**.

The Organizations page lists all of the organizations that are defined in CentraSite.

- 2 Click **Add Organization** to open the Add Organization page.
- 3 In the **Organization Information** panel, specify the following fields:

In this field...	Do the following...
<b>Name</b>	Enter a name for the new organization. An organization name can contain any character (including spaces).  <b>Note:</b> An organization name does not need to be unique within the CentraSite registry. However, to reduce ambiguity, you should avoid giving multiple organizations the same name.
<b>Description</b>	<i>Optional.</i> Enter a description for the new organization. This description appears when a user displays the list of organizations on the CentraSite Control.
<b>Administrator</b>	Assign an administrator for this organization.  ■ To assign an existing user to this position (i.e., a user that is already defined within CentraSite), click <b>Pick Existing</b> and select the user from CentraSite's existing database.

In this field...	Do the following...
	<ul style="list-style-type: none"> <li>■ To add a new user to CentraSite to serve in this position, click <b>Create New</b> and select the user from the external directory.</li> </ul> <p>If you need procedures for this, see the topic <i>Adding a User</i> in the section <i>About Users</i> in the document <i>Users, Groups, Roles and Permissions</i> .</p>
<b>Web Page</b>	<i>Optional.</i> Enter the website URL of the organization.

4 In the **Address Information** tab, specify the following:

In this panel...	Do the following...
<b>Address</b>	<i>Optional.</i> Specify the address information for the primary location of this organization.
<b>Contact Information</b>	<p>Specify the contact information for the primary contact of this organization.</p> <ol style="list-style-type: none"> <li>1. Enable the <b>Select Administrator as Primary Contact</b> option if you want the individual specified in the <b>Administrator</b> field to serve as the organization's primary contact.</li> </ol> <p style="text-align: center;">—OR—</p> <p>Use the <b>Pick Existing</b> or <b>Create New</b> button to select a user from CentraSite's user database or from an external directory, respectively.</p> <ol style="list-style-type: none"> <li>2. Specify the phone and fax numbers for the primary contact. You can specify multiple phone and fax numbers.</li> </ol>

5 If you have any custom properties (key-value pairs) that you want to specify for the organization, select the **Object-Specific Properties** tab and specify the key-value pairs as follows:

1. Click **Add Property**.
2. In the **Add Object-Specific Properties** dialog box, enter a keyword and value for the property. You can add multiple values for a single property.
  - The name of the property can consist of letters, numbers and the underscore character (\_). It cannot contain a space or other special characters.
  - You can optionally supply a namespace for the property.
3. Click **OK**.

6 If a user with administration permissions has added custom attributes to the Organization object type definition, select the **Attributes** tab and specify the attributes as necessary. Attributes that are marked with an asterisk (\*) are required. You must at least specify all required attributes.



**Note:** You will see the **Attributes** tab only if a user with administration permissions has added custom attributes to the Organization object type definition.

- 7 Click **Save** to save the new organization.



# 7 Viewing or Editing the Properties of an Organization

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You use the Edit Organization page to examine and/or edit the properties of an organization. When viewing or editing the properties of an organization, keep the following points in mind:

- By default, all users have implicit (and irrevocable) view permissions on organizations. To edit an organization you must have the "Manage Organizations" permission on that organization.
- You cannot modify the name of the "Default Organization" (not even if you have the default permissions associated with the CentraSite Administrator role).
- You can change the organization administrator and/or the primary contact of an organization when necessary. You cannot, however, leave these positions unassigned.
- You cannot change an organization's parent assignment (i.e., you cannot move a child organization from one parent to another).

## ▶ To view and/or edit an organization

- 1 In CentraSite Control, go to **Administration > Organizations**.
- 2 By default, all of the available organizations are displayed.

If you want to filter the list to see just a subset of the available organizations, type a partial string in the **Search** field. CentraSite applies the filter to the **Name** column. The **Search** field is a type-ahead field, so as soon as you enter any characters, the display will be updated to show only those organizations whose name contains the specified characters. The wildcard character "%" is supported.

- 3 Locate the organization that you want to view or edit.
- 4 From the organization's context menu, select **Details**.
- 5 View or edit the attributes on the Edit Organization page as necessary. For additional information about the attributes on this page, see the relevant steps in [Adding an Organization](#).
- 6 Click **Save**.



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## Adding a Child Organization to an Organization

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A *Child Organization* represents a subdivision of a parent organization. An organization can have multiple child organizations. Each of these child organizations can have their own child organizations, users, policies, taxonomies and assets. For example, a banking organization might have two child organizations, a “Personal Banking” organization and a “Commercial Banking organization”. Each of these child organizations might have additional children, for example, a “Credit Division” and a “Finance Division”.

You use the following procedure to create a child organization.

▶ **To create a child organization**

- 1 Open the Edit Organization page for the organization to which you want to add the child organization. If you need procedures for this step, see [Viewing or Editing the Properties of an Organization](#).
- 2 On the Organizations page, locate the organization for which you want to create a child organization.
- 3 From the organization's context menu, select **Details**.
- 4 Select the **Child Organizations** tab and click **Add Child Organization**.
- 5 Complete the requested information for the child organization. If you need procedures for this step, refer to the relevant steps in [Adding an Organization](#).
- 6 When you have entered all of the details for the child organization, click **Save** to save the new child organization.



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## Deleting an Organization

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You use the Organizations page to delete an organization. When deleting an organization, keep the following points in mind:

- To delete a top-level organization, you must have the "Manage Organizations" permission at the system level.
- To delete a child organization, you must have the "Manage Organizations" on the organization's parent (or other antecedent).
- You cannot delete the "Default Organization" (not even if you have the default permissions associated with the CentraSite Administrator role).
- You cannot delete an organization that has one or more associated objects. For example, if an organization "ABC" owns the child organization "DEF", an internal association "Owns" or "Owned By" exists between the organizations. CentraSite does not let you delete an organization with incoming associations. Therefore, to delete an organization you must first delete all of its associated objects.
- You cannot delete an organization if one of its users serves as the primary contact of another organization.

### ▶ To delete an organization

- 1 In CentraSite Control, go to **Administration > Organizations**.
- 2 In the **Organizations** page, select the organization(s) that you want to delete.
- 3 Click **Delete**.

