software AG

CentraSite

Logging On and Using the CentraSite UIs and APIs

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CentraSite

This document applies to CentraSite Version 9.6.

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

Table of Contents

Logging On and Using the CentraSite UIs and APIs

This document describes the graphical user interfaces (GUIs) and application program interfaces (APIs) available with CentraSite. It explains how to log on to CentraSite using CentraSite Control and how various properties associated with your user account determine what you can do using the UI and APIs.

The content is organized under the following sections:

Starting the Graphical User Interfaces	Describes how to start the user interfaces.
Logging On and Off	Describes how to log on and off.
Ways to Interact with CentraSite	Lists the GUIs and APIs that you can use to interact with CentraSite.
Your CentraSite User Account	Provides general information about your user account and describes how the organization, role(s) and permissions associated with your account affects what you can do with CentraSite.
Using the CentraSite Control User Interface	Provides basic information about working with CentraSite Control, including logging on/off, using the basic navigation controls and working with My Favorites.
Using the CentraSite Plug-Ins for Eclipse	Describes how to install and use the CentraSite plug-ins for Eclipse.

1   Starting the Graphical User Interfaces

CentraSite offers several browser-based user interfaces for managing the CentraSite Registry Repository. This chapter describes how to start and log on to these interfaces.

Note: Because CentraSite's browser-based user interfaces uses JavaScript, you must ensure that your web browser is set up to allow JavaScript to execute. For more information about how to verify that your web browser settings to allow JavaScript, see the help for your web browser.

Using URLs to Start the Graphical User Interfaces

URLs have been predefined to allow you to start the browser-based graphical user interface components directly in a browser:

URL	UI Component started
http://$<server>$:$<port>$/PluggableUI/Control	CentraSite Control
http://$<server>$:$<port>$/PluggableUI/SoapUI	SOAP Interactive Interface

Here, $<server>$ is the machine on which the Software AG Runtime is running, and $<port>$ is the number of the Software AG Runtime port. So, for example, *http://localhost:53307/PluggableUI/Control* would start CentraSite Control on a local installation using the default Software AG Runtime port number.

Alternative Procedures on Windows

The Windows **Start** menu item **Programs > Software AG > Tools** contain an entry for starting CentraSite Control.

This Start menu entry is available on the machine where the Software AG Runtime is installed.

If you have just installed CentraSite, clear your web browser's cache, otherwise JavaScript errors can occur when you start some browser-based components of CentraSite.

2 Logging On and Off

Logging on and off in CentraSite Control

Your first logon after Installation

When you log on for the first time after the product installation, you must use the user ID "Administrator" and password "manage". This logs you on as the internal user "Administrator", and this user has the "CentraSite Administrator" role. After you have logged on with this user ID and password, you can perform all administration tasks, such as creating other users and assigning roles to them.

You can alternatively log on as a guest user (see instructions in the following section), but this user cannot perform any administration tasks.

Logging on as a registered user or as a guest user

You can log on as the internal user "Administrator", or as a user who has been registered as a CentraSite user by another user with the appropriate permissions. Alternatively, you can log on as a guest user without being registered as a user.

When you log on as a registered user, you supply a user ID and password. CentraSite Control validates the user ID and password against your machine's user repository (for example, operating system or LDAP). See the section *About Users* in the document *Users, Groups, Roles and Permissions* for information about defining CentraSite users and associating them with users in the user repository.

When you access CentraSite Control as a guest, you are permitted to see only those assets whose view permissions include the "Everyone" group.

▶ **To log on to CentraSite Control as a registered user**

1   In the CentraSite Control logon screen, enter your user ID and your password.

2   Click **Log On**.

▶ **To log on to CentraSite Control as a guest user**

■   In the CentraSite Control logon screen, click **Browse as Guest**, without supplying a user name or password.

Logging off from CentraSite Control

To log off from CentraSite Control, choose the **Log Off** link at the top of the screen.

If you do not log off when you are finished using CentraSite Control (that is, if you simply close the browser window with out logging out), your session will automatically time out after 60 minutes of inactivity.

> **Note:** We recommend you to explicitly log off when you have finished using the user interface. Logging off ensures that the cookies from your session are cleared from your machine. If you close your browser without logging off, these cookies might not be cleared (depending on which browser you use) and could be reused if you were to log on to CentraSite Control before your earlier session's timeout period had elapsed.

3   Ways to Interact with CentraSite

The following describes the GUIs and APIs that you can use to interact with CentraSite.

User Interfaces (UIs) to CentraSite

The following are the user interfaces you use to interact with CentraSite:

- **CentraSite Control**
  CentraSite Control is the primary graphical user interface for CentraSite. It is browser-based and provides access to CentraSite's full range of features and capabilities.

  - If you are an administrator, you use CentraSite Control to manage user accounts, user groups and roles.

  - If you are an enterprise architect or an analyst, you use CentraSite Control to manage policies, generate reports and define new asset types.

  - If you are a developer, you use CentraSite Control to search the catalog for assets that you want to use and to publish assets that you create.

  For information about accessing CentraSite using CentraSite Control, see *Using the CentraSite Control User Interface*.

- **The CentraSite Plug-Ins for Eclipse**
  CentraSite provides a set of plug-ins for the Eclipse Java IDE. These plug-ins enable developers to publish and retrieve assets directly from their development environment. The plug-ins also provide the tools you use to define reports that run against the CentraSite registry database. For more information about using the CentraSite plug-ins for Eclipse, see *Using the CentraSite Plug-Ins for Eclipse*.

- **The CentraSite Business User Interface**
  The CentraSite Business User Interface allows occasional users and non-technical users to quickly and simply access CentraSite's features.

Application Program Interfaces (APIs) to CentraSite

The following are the user interfaces you can use to interact with CentraSite:

- **The CentraSite API for JAXR**
  The CentraSite API for JAXR (Java API for XML Registries) supports the Java EE interface and enables you to develop Java programs that interact with the CentraSite registry. For more information about using this API, see the document *CentraSite API for JAXR*.

■ **The UDDI API**
The UDDI API enables you to interact with CentraSite using the UDDI services (e.g., the Publish, Inquiry and Security services). For more information about using the UDDI services with CentraSite, see the document *Access via UDDI*.

■ **The CentraSite API for XQJ**
The CentraSite API for XQJ (XQuery API for Java) enables you to create Java programs that use XQuery to query the CentraSite registry. For more information about using XQJ with CentraSite, see the document *CentraSite API for XQJ*.

■ **The CentraSite API for JMX**
The monitoring and management functions provided by the System Management Hub are exposed for the Java Management eXtensions API (JMX). Using this interface enables you to monitor and manage CentraSite via JMX-based management tools. For more information about using this API, see the document *CentraSite Java Management Interface*.

4 Your CentraSite User Account

This chapter covers the following topics:

Your User Account

To use the CentraSite GUIs or APIs, you must have a user account on the instance of CentraSite with which you want to work. Properties associated with your user account determine the CentraSite features you can use and the set of registry objects with which you can work.

> **Note:** If your needs are very limited, you can access CentraSite as a "guest". Guests are typically allowed to browse a limited set of assets in view-only mode (the exact scope of what a guest can do is determined by the administrator of your CentraSite installation). For information about the configuring the capabilities of a guest user, see the section *About Users* in the document *Users, Groups, Roles, and Permissions*.

During installation, CentraSite automatically creates a user account for the user who performs the installation. This user account is assigned to the CentraSite Administrator role, which has "super user" permissions.

- If you are the one who installed CentraSite, a user account has automatically been created for you. Following installation, you can log on to CentraSite using your regular operating system or domain credentials (i.e., using the same user name and password that you normally use to access the machine on which CentraSite is installed).

- If you are not the one who installed CentraSite, you must contact the administrator of your CentraSite installation to have a user account created for you.

How Organizations, Roles and Permissions Affect Your User Account

The types of tasks you can perform in CentraSite and the set of objects with which you can work are determined by the following characteristics of your user account:

- The organization to which your user account belongs.

- The roles that are associated with your account.

- The objects on which your account has access permission.

Organizations

Your user account belongs to one (and only one) organization. When you create registry objects in CentraSite, those objects belong to your user account, and by extension, to your organization.

Generally speaking, an organization functions as a separate administrative domain within CentraSite. When you log on to CentraSite, you interact with the set of objects that "belongs" to your organization. When you operate on these objects, the registry enforces the policies imposed by your organization. For example, when you add an asset to the catalog, the policies associated with your organization determine which type of approval, validation or testing processes that asset must undergo.

Roles

Your user account is associated with one or more *roles*. A role defines a set of *permissions*. Permissions are coarse-grained access controls that enable your account to work with an entire class of objects, use a specific set of screens in the UI and/or perform restricted administrative tasks. To create user groups, for example, your account must belong to a role that has the "Manage Users" permission.

When you log on to CentraSite using CentraSite Control, the roles associated with your user account determine which screens and controls are visible in the user interface. If you build client programs using the CentraSite API, the roles associated with the user account that the program uses to log on to CentraSite determine which types of objects it can manipulate and which methods or operations it is allowed to perform.

To determine the roles to which your user account belongs, see *Viewing Information About Your User Account*.

> **Note:** If your account is assigned to multiple roles, it receives the combined permissions of all of those roles.

Predefined Roles

CentraSite is installed with a set of predefined roles. If an administrator needs to give a user a set of permissions that is not provided by one of the predefined roles, he or she can do so by creating a custom role.

The following table describes a few of the key roles in CentraSite. For a complete list of the predefined roles, see the section *About Roles and Permissions* in the document *Users, Groups, Roles, and Permissions*.

This role...	Provides the permissions necessary to...
CentraSite Administrator	Perform high-level administrative tasks such as creating organizations and setting global (server-wide) parameters. This role has every permission available to a CentraSite user. Users in this role function as "super users." The user who installs CentraSite automatically belongs to this role.
Organization Administrator	Perform high-level administrative tasks such as creating users and defining user groups and roles for an organization.
Policy Administrator	Create policies. View, edit or delete policies within any organization.
Asset Type Administrator	Customize the catalog by defining new attributes, profiles and asset types.
Asset Administrator	View, edit or delete any asset within an organization.
Asset Provider	Publish assets to the catalog.
Asset Consumer	Browse the catalog.

Instance-Level Permissions

Instance-level permissions are fine-grained controls that enable view, edit or delete access to individual objects in the registry. Instance level permissions can be extended to individual users, groups of users or both.

Generally speaking, when you create an object in CentraSite, everyone within your organization receives permission to view the object, however, only you (as the creator of the object) and administrators in certain roles have permission to edit and delete the object. To extend edit and delete permission to other users, you must set the instance-level permissions on the object. You can also use instance-level permissions to enable users in other organizations to view, edit or delete objects that belongs to your organization.

5   Using the CentraSite Control User Interface

This chapter describes how to use the CentraSite Control User Interface.

Starting CentraSite Control

For information about starting and logging in to CentraSite Control, see the section **Starting the Graphical User Interfaces**.

After you have logged in to CentraSite Control, you see the Welcome page. In addition to the standard navigation bar, this page offers you links to frequently used CentraSite Control features and also to external links associated with CentraSite, such as the CentraSite community pages.

The Navigation Controls in the User Interface

The following section describes the main navigation controls in CentraSite Control. The example shown is the page **My CentraSite**, which you access via the navigation bar menu entry **Home > My CentraSite**.
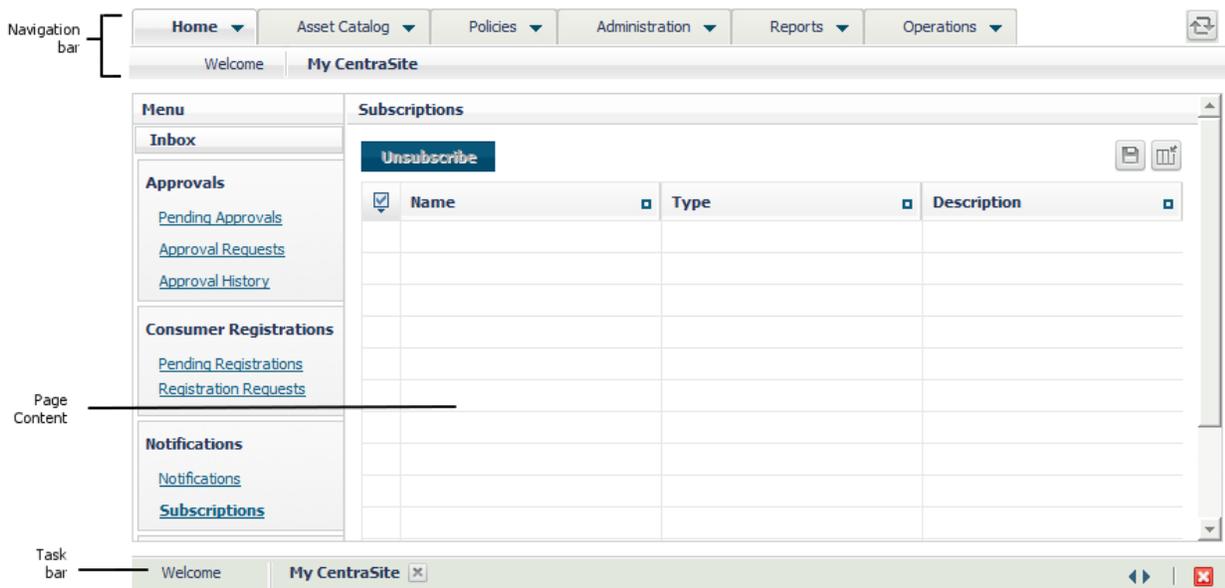
- **Navigation bar**
  You use the tabs and menus on the navigation bar to choose the task that you want to perform. The tabs and submenus that appear on this bar depend upon the edition of CentraSite that you are using and the role(s) assigned to your user account.

■ **Page content**

This is the area in which CentraSite Control displays the details associated with your chosen task. The actual content that you will see for a task depends upon the edition of CentraSite that you are using as well as the role-based and instance-based permissions associated with your user account.

■ **Task bar**

The task bar maintains list of all the open tasks. You can use the task bar to switch from one open task to another. You can also use the task manager to close an individual task or to close all open tasks in a single step.

> **Note:** CentraSite Control provides various controls that enable you to navigate from one page to another in the user interface. To ensure that actions are carried out correctly, always use the navigation controls provided within the CentraSite Control user interface, not the general navigation controls (page forward, page backward and so forth) in your browser.

Context Menus

Context menus are available within many of the lists that CentraSite Control displays. A context menu enables you to perform an action on a specific object in a list.

To display the object's context menu, right-click the object upon which you want to act. The set of actions in the context menu depends upon the type of object that you have selected.

The Actions Menu

Many screens offer the **Actions** menu in addition to the context menu. The **Actions** menu is a drop-down menu that contains actions that you can perform on one or more objects in the currently displayed list of objects.

The set of actions offered by the **Actions** menu on a particular screen is usually a subset of the actions offered by the context menu. This is because the actions in the **Actions** menu can be applied to multiple selected objects, so the set of actions is restricted to just the actions that can be performed on all of the screen's listed objects. In particular, if the screen contains objects of several object types, actions that are relevant for one object type might not be relevant for another object type, so such actions are not offered in the menu.

To use this menu, mark the checkbox for the required objects in the currently displayed list of objects, then open the **Actions** menu and select the required action. This action will be applied to all of the selected objects.

Setting Display Options in CentraSite Control

Use the following procedure to configure your display settings in CentraSite Control. The display settings specify the language in which CentraSite Control displays the user interface (assuming the appropriate language pack is installed on the Software AG Runtime) and the time zone in which timestamped events are rendered when you view the activity logs and other dated information in CentraSite Control.

▶ **To set display preferences**

1   In CentraSite Control, click the **My Account** link at the top of the screen.

2   On the My Account page, specify the following:

In this field...	Specify...
Language	The language in which you want CentraSite Control to be displayed.
Locale	The language of the operating system locale being used on your machine. If you are the CentraSite Administrator you can restrict the locale availability. For information, see the section *Restricting the Locale*.
Time Zone	The time zone in which you want timestamped log information rendered when it is displayed to your user account.
Date Format	The format in which you want CentraSite Control to display dates to you.
Time Format	The format in which you want CentraSite Control to display times to you.

In this field...	Specify...
Render Numbers with 1000 separator	Whether you want CentraSite Control to display numeric values with a thousands' separator character (e.g., 10,000).
Start Page	Your preferred start page. You can specify whether the start page should be the **Welcome** page (the default start page) or the **Inbox** page (containing your Inbox and the other elements of the **My CentraSite** page).

3   When you are done with the changes, click Save.

⚠️   **Important:** Changes to the **Language**, **Locale** and **Start Page** setting take effect at the next logon. All other changes you make are immediately active.

Restricting the Locale

This property allows the CentraSite Administrator to restrict the locale CentraSite Control user interface to users. This setting is available in the **Locale** field in My Account page.

This setting does not allow users to change their locale settings in the My Account page. Thus logged on users are restricted to the locales allowed by the administrator.

If you are the CentraSite Administrator, you can define the locales in the **Allowed Locale** field. Only these defined locales will be available in the **Locale** field for every other user who logs in to the CentraSite Control.

What Happens When User is Restricted with Multiple Locale(s)

If the administrator had restricted to more than one locale, then when a user logs into the CentraSite Control either one of the following happens:

■ If you are an existing user and your locale matches with the allowed locale(s) in CentraSite Control, then you will be permitted to directly log in into the CentraSite Control.

■ If you are an existing user and your locale does not match with the allowed locale(s) in CentraSite Control, then you will have to choose the allowed locale(s) from the **Locale Settings** pop-up.

■ If you are a new user, then you will have to choose the allowed locale(s) from the **Locale Settings**.

What Happens When User is Restricted with a Single Locale

If the administrator had restricted to just one locale, then when a user logs into the CentraSite Control either one of the following happens:

■ If you are an existing user and your locale matches with the allowed locale in CentraSite Control, then you will be permitted to directly log in into the CentraSite Control.

- If you are an existing user and your locale does not match with the allowed locale in CentraSite Control, then CentraSite Control automatically sets the locale and displays that the current locale is modified to match with the allowed locale.

- If you are a new user, then CentraSite Control by default sets the allowed locale.

▶ **To restrict the locale**

1   In CentraSite Control, click the **My Account** link at the top of the screen.

2   In the **My Account** page, choose the locale(s) from the **Allowed Locales** field in System-wide Settings panel.

    If you want to specify multiple locales, use the plus button to add additional rows.

3   Choose **Save** to confirm the change.

    The changes take effect immediately and you will be redirected to the log on page. If you do not specify a locale and choose to cancel the setting, you will still be redirected to the log on page.

Viewing/Editing Information About Your User Account

Use the following procedure to display information about your user account, including the organization, roles and groups to which your account belongs.

▶ **To view information about your user account**

1   From the navigation bar, choose **Administration > Users > Users**.

2   In the **Users** list, click the user name that represents your account.

    - To modify general information about your user account (name, email address, postal address), edit the contents of the **User Information** box and the **Additional Information** tab as necessary. (Depending on the role or roles associated with your user account, you might not be permitted to edit all fields.)

    - Use the **Groups** and **Roles** tabs to view the user groups and roles with which your account is associated.

    - Use the **Assets** tab to display the list of assets that you currently own.

    - You may want to add some metadata information that you feel is relevant to your user account. To do this, you can choose the **Object Specific Properties** tab and define a set of one or more properties, each consisting of one keyword and one or more values associated with the keyword. The keywords you enter and their values can be freely chosen.

3   If you have made any changes to your account information, choose **Save**.

Working with My Favorites

The My Favorites feature enables you to create lists and shortcuts to items that you use routinely or otherwise want to keep close at hand. Using My Favorites, you can:

- Display the list of assets that you own (or that you consume) with a single click.
- Create quick links to selected assets in the catalog.
- Create a quick link to a saved search or XQuery.
- Create a quick link to a list of assets of a particular category or type.

The My Favorites list resides on the page **Home > My CentraSite**. By default, it contains the following entries:

Choose this entry...	To...
▣Assets I Consume	Display the list of assets for which you are registered as a consumer.
▣ Assets I Provide	Display the list of assets that you own.

Additionally, you can add any of the following entries to My Favorites:

Entry	Description
▲ Individual asset	Displays the details for a specified asset. This type of entry acts as a shortcut to the selected object. For information about adding this type of link to My Favorites, see *Adding Shortcuts to Individual Objects*.
▦ Individual report template	Displays the details for a specified report template. This type of entry acts as a shortcut to the selected object. For information about adding this type of link to My Favorites, see *Adding Shortcuts to Individual Objects*.
▤ List	Serves as a folder for a collection of objects. Each such list can contain a combination of objects that have different object types, such as assets, taxonomies, organizations and users. For information about adding entries to the list, see *Adding a List of Objects to My Favorites*.
▣ Saved search	Executes a specified search and displays the resulting list of assets. For information about adding this type of entry to My Favorites, see *Adding a Saved Search to My Favorites*.
▣ Saved XQuery	Executes a specified query and displays the resulting list of assets. For information about adding this type of entry to My Favorites, see *Adding an XQuery to My Favorites*.
▣ List of Type	Displays a list of objects of a specified type. For information about adding this type of entry to My Favorites, see *Adding a Type List to My Favorites* .

Entry	Description
🔘 List of Category	Displays a list of assets of a specified taxonomy category. For information about adding this type of entry to My Favorites, see *Adding a Category List to My Favorites* .

Smart Lists

The following types of entries are called *smart lists*:

- Saved search
- List of Type
- List of Category

A smart list produces a dynamic result that is based on a query. For example, when you choose a "List of Type" or a "List of Category" entry, CentraSite Control executes the appropriate query against the registry and returns a list of objects that matches the requested object type or taxonomy category.

Viewing My Favorites

Use the following procedure to access My Favorites.

▶ **To view My Favorites**

1   From the navigation bar, choose **Home > My CentraSite** to display the My CentraSite page.

2   In the **Menu** box on the left side of the screen, choose **My Favorites**.

Adding Shortcuts to Individual Objects

Using My Favorites, you can create individual shortcuts to the following types of objects:

- Assets (any type)
- Report templates

Adding a shortcut to My Favorites enables you to jump directly to the detail page for the specified asset or report template. Additionally, you can perform additional actions on the asset or report template using the shortcut's context menu. For example, if the shortcut is to a report template, you can execute the report directly from the shortcut's context menu.

When you add a shortcut to My Favorites, be aware that:

- If you add a shortcut to an object that already exists in you're my Favorites list, CentraSite Control will ignore your request. It will not create a duplicate shortcut.

- If you add a shortcut to My Favorites and the underlying asset or report template is subsequently deleted from the registry, the shortcut will also be automatically removed from My Favorites.

▶ **To add a shortcut to an individual object to My Favorites**

1   Use the Asset Catalog task or the Reports task to display a list containing the asset or the report template that you want to add to My Favorites. If you need procedures for this step, see the section *Browsing the Asset Catalog* in the document *Using the Asset Catalog*, or the section *Viewing the Report Templates List* in the document *Working with Reports and Report Templates*.

2   Locate the asset or report template that you want to add to My Favorites and from its context menu choose **Add to Favorites**.

3   Provide a name for the shortcut , then choose **OK**.

You can also add shortcuts to multiple assets in a single operation. To do this, proceed as follows:

▶ **To add shortcuts to multiple assets in a single operation**

1   In CentraSite Control, use either the Browse or the Search feature in the asset catalog to select a list of the assets you want to add. If you need information on how to browse or search the asset catalog, see the section *Browsing the Asset Catalog* in the document *Using the Asset Catalog*, or the section *Searching the Asset Catalog* in the same document.

2   Mark the checkbox of each asset for which you wish to create a shortcut.

3   In the **Actions** menu, click **Add to Favorites**.

    The shortcuts for the selected assets are then created in the My Favorites list. The name of each shortcut is the name of the asset to which the shortcut points. Note that if two or more of the assets have the same name, their shortcuts will also have the same name.

💡   **Tip:** The **Add to Favorites** command is also available from the **Actions** menu on the details page of each asset and report template.

Adding a List of Objects to My Favorites

In CentraSite Control, you can combine objects of different types into so-called *lists*. These are user-defined logical collections that allow you to treat the whole list as a single entity. You can, for example, create a list containing assets, organizations and users, then perform an Export operation on the list; the resulting export set would contain all of the objects contained in the list.

When you add objects to a list, CentraSite does not physically copy the objects into the list. Instead, the list contains pointers to the objects. This means, for example, that if you delete a list, you only delete the pointers to the physical objects but you do not delete the physical objects themselves.

The lists that you create are shown in CentraSite Control under **My CentraSite > My Favorites**.

▶ **To add an object to a list in My Favorites**

1   From the navigation bar, navigate to the display that shows the object that you wish to add
     to the list. For example, if you wish to add an asset to a list, choose **Asset Catalog > Browse**
     and locate the asset that you want to add to My Favorites. If you need information on how
     to browse or search the asset catalog, see the section *Browsing the Asset Catalog* or *Searching
     the Asset Catalog* in the document *Using the Asset Catalog*

2   Open the object's context menu and choose **Add To List**.

3   If you want to add the object to an existing list, choose the list from the drop-down list in the
     dialog box. Otherwise type a name in the text box to create a new list.

4   Choose **OK**.

You can also add multiple objects to a list in a single operation. To do this, proceed as follows:

▶ **To add multiple assets to a list in My Favorites in a single operation**

1   In CentraSite Control, navigate to the display that shows the objects that you wish to add to
     the list. Then select the objects you want to add.

2   Mark the checkbox of each object you want to add.

3   In the **Actions** menu, click **Add To List**, then continue as described above for a single object.

If at a later stage you want to remove the object from a list in My Favorites, proceed as follows:

▶ **To remove an object from a list in My Favorites**

1   Display My Favorites and choose the list that contains the object that you want to remove.

     This displays the names of the objects contained in the list.

2   Mark the checkbox of the object you want to remove from the list.

3   Choose **Delete**.

When you remove an object from a list, you just remove the name of the object from the list. The
physical object that the list entry points to is not affected in any way.

If you add an object to a list and later delete the original object that the list entry points to, the
entry in the list is deleted automatically.

Adding a Saved Search to My Favorites

Adding a saved search to My Favorites enables you to execute the search with a single click. When you choose a saved search in My Favorites, CentraSite Control executes the search and displays the results.

▶ **To save a search to My Favorites**

1   From the navigation bar, choose **Asset Catalog > Search**.

2   Use the **Keyword** tab or the **Advanced** tab to define your search criteria. If you need procedures for this step, see the section *Searching the Asset Catalog* in the document *Using the Asset Catalog*.

3   Choose **Save**. Note that you can save your search without first executing it.

4   Specify a name for the saved search and choose **OK**.

    If the name you specify for the saved search already exists, you will be asked to provide a different name.

▶ **To view or edit a saved search**

1   Display My Favorites and choose the saved search that you want to view or edit.

    This runs the saved search and shows the results in the results pane.

2   In the results pane, choose the **Refine** button.

    This displays the search criteria that were used in the search.

3   Examine and/or redefine your search criteria as necessary.

4   If you made changes to the search criteria, choose **Save** to save the changes.

    The refined search is considered to be a new saved search rather than an update to an existing saved search, so CentraSite Control asks you to provide a name for the new saved search.

Adding an XQuery to My Favorites

Adding an XQuery to My Favorites enables you create a shortcut to an XQuery expression. When you choose a saved XQuery in My Favorites, CentraSite Control opens the expression in the XQuery editor.

▶ **To save an XQuery to My Favorites**

1   From the navigation bar, choose **Asset Catalog > Search**.

2   Use the **XQuery** tab to define your XQuery expression. If you need procedures for this step, see the section *Searching the Asset Catalog* in the document *Using the Asset Catalog* .

3   Choose **Save**. Note that you can save your XQuery expression without first executing it.

4   Specify a name for the saved XQuery expression and choose **OK**.

     If the name you specify for the saved search already exists, you will be asked to provide a different name.

Adding a Category List to My Favorites

You use a category list to display the list of assets that belong to a specified taxonomy category. For example, if your site uses a taxonomy that classifies assets by project, you might want to create shortcuts that display the assets associated with your projects.

▶ To save a Category List to My Favorites

1   From the navigation bar, choose **Asset Catalog > Browse** to open the asset catalog.

2   In the **Browse By** list, select the taxonomy that contains the category that you want to add to My Favorites.

3   In the taxonomy tree, locate the category that you want to add to My Favorites and from its context menu choose **Add to Favorites**.

4   Specify a name for the category list and choose **OK**.

     If the name you specify already exists, you will be asked to provide a different name.

> **Note:** If you have permission to access the **Administration > Taxonomies** task from the navigation bar, you can also add a category list to My Favorites from the context menu for a taxonomy listed on the Taxonomies page.

Adding a Type List to My Favorites

You use a type list to create a shortcut to a list of assets of a specified asset type (e.g., Application Servers, Web Services or XML Schemas).

▶ To save a Type List to My Favorites

1   From the navigation bar, choose **Asset Catalog > Browse** to open the asset catalog.

2   In the **Asset Types** list (in the upper left corner of the page), locate the asset type that you want to add to My Favorites.

3   Open the context menu for the asset type and choose **Add to Favorites**.

4   Specify a name for the type list and choose **OK**.

     If the name you specify already exists, you will be asked to provide a different name.

> **Note:** If you have permission to access the **Administration > Types** task from the navigation bar, you can also add a type list to My Favorites from the context menu for an object type listed on the Type Management page.

Removing Entries from My Favorites

Use the following procedure to remove an entry from My Favorites. Note that when you remove an entry, any underlying assets to which the entry refers are not affected.

▶ **To remove an entry from My Favorites**

1   Display **My Favorites** and locate the entry that you want to remove.

2   From the context menu for that entry, choose **Remove from Favorites**.

Renaming an Entry in My Favorites

Use the following procedure to rename a user-defined entry in My Favorites.

> **Note:** Some of the entries in My Favorites are predefined and cannot be renamed. If an entry cannot be renamed, the **Rename** command will not appear on the context menu.

▶ **To rename an entry in My Favorites**

1   Display **My Favorites** and locate the entry that you want to rename.

2   From the context menu for that entry, choose **Rename**.

3   Specify a new name for the entry and choose **OK**.

Working with Notifications

Using the notification feature, you can request CentraSite to alert you when specified assets or policies are modified. If you have requested a notification for one or more assets or policies, CentraSite Control displays a number in the **Notifications** Inbox indicating how many objects on your notification list have been updated since the last time you viewed your notifications.
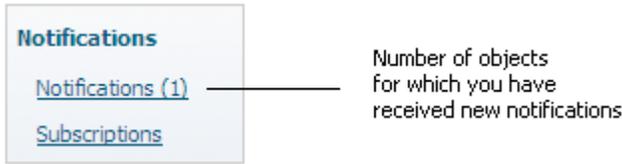
When you choose the **Notifications** link in your inbox, CentraSite Control opens a two-pane screen. The upper pane displays the list of objects for which you have asked to receive notifications. The lower pane displays the *change log* of the object currently selected in the upper pane. The change log is a record of the changes that have been made to the object since the object was initially created. The log indicates when a change was made and who made the change.
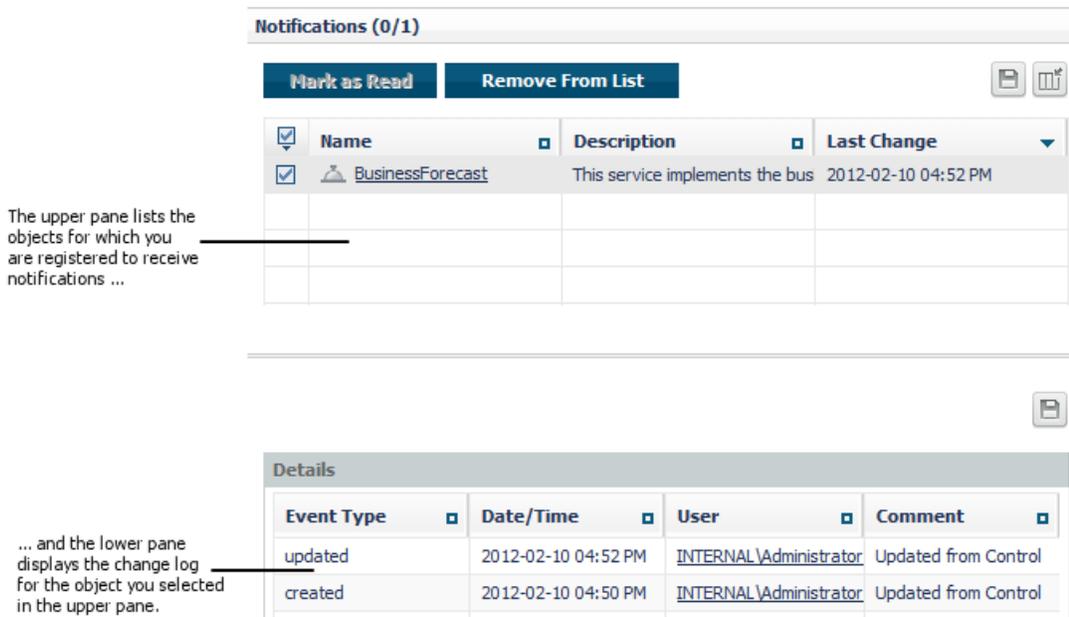
Note: When you create a notification request for an asset, your request is reflected on the asset's **Subscription** profile. The **Subscription** profile displays the list of users who are currently registered to receive notifications for the asset.

Creating a Notification Request

Use the following procedure to have CentraSite notify you when a specified asset or policy is modified.

▶ To create a notification request

1   Display the list that contains the asset or policy on which you want to receive notifications. If you need procedures for this step, see the section *Browsing the Asset Catalog* in the document *Using the Asset Catalog,* or the topic *Viewing the Policy List* in the section *Functional Scope* in the document *Working with Design/Change-Time Policies*.

2   From the context menu for the asset or policy, choose **Notify me**.

A message appears, informing you that the notification has added to the **Notifications** list.

> 📄   **Note:** If you see the **Remove From My Notifications** command on the context menu
> instead of the **Notify me** command, that indicates that you are already registered to
> receive notifications for the selected asset or policy.

3   Go to the **Notifications** list on the **My CentraSite** page to verify that the notification request
has been added to your **Notifications** list.

You can also create notification requests for multiple assets in a single operation. To do this, proceed
as follows:

▶ **To create notification requests for multiple assets in a single operation**

1   In CentraSite Control, use either the Browse or the Search feature in the asset catalog to select
a list of the assets for which you wish to create notification requests. If you need information
on how to browse or search the asset catalog, refer to the section *Browsing the Asset Catalog* or
Searching the Asset Catalog in the document *Using the Asset Catalog*.

2   Mark the checkbox of each asset for which you wish to create a notification request.

3   In the **Actions** menu, click **Notify Me**, then continue as described above for creating a notific-
ation request for a single asset.

Viewing Notifications You Have Received

Use the following procedure to display the notifications that you have received.

▶ **To view notifications you have received**

1   Go to **Home > My CentraSite**.

2   Display the **Inbox** and choose **Notifications** to open the **Notifications** screen.

Bolded rows in the notification list in the upper pane indicate objects that have been updated
since you last viewed this list.

3   To view the change list for an object, choose the object in the notification list in the upper
pane. When you choose the object, *click anywhere in its row except on the object name*. If you click
the object's name, CentraSite Control will display the details page for that object instead of
the opening the object's change list.

Deleting a Notification Request

If you no longer want to receive notifications for an asset or a policy, use the following procedure to delete your notification request.

▶ **To delete a notification request**

1   Display the list that contains the asset or policy for which you want to delete a notification request. If you need procedures for this step, see the section *Browsing the Asset Catalog* in the document *Using the Asset Catalog*, or the topic *Viewing the Policy List* in the section *Functional Scope* in the document *Working with Design/Change-Time Policies*.

2   From the context menu for the asset or policy, choose **Remove from My Notifications**.

6   Using the CentraSite Plug-Ins for Eclipse

The distribution of CentraSite includes a set of Eclipse plug-ins for development purposes. The CentraSite plug-ins for Eclipse provide a graphical user interface that you can use to create and manage the information in a CentraSite registry and repository.

Information on installing and using the plug-ins is supplied in the section *Setting up the Eclipse Plug-Ins* in the document *Post Installation and Additional Uninstallation Steps for CentraSite*.

Examples of using the Eclipse plug-ins for running BIRT reports are contained in the BIRT tutorial, which you can find on the **http://documentation.softwareag.com/** website.