HP SOA Systinet Customization Editor

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User Guide

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Welcome to This Guide

This guide describes how to use the HP SOA Systinet Customization Editor to edit the SDM configuration and the user interface of an installation of SOA Systinet. You can use the Customization Editor to modify the model, its registry mappings and certain UI elements.

How This Guide is Organized

This guide explains how to use the Customization Editor to create an extension to the configuration of HP SOA Systinet, how to configure the individual elements of SOA Systinet and then deploy them to an installation of SOA Systinet.

The guide explains:

Getting Started on page 13. Introducing and configuring the Customization Editor, its main features, and the customizable elements of SOA Systinet.

Manipulating Artifact Types on page 33. Customizing the attributes, properties and appearance of artifacts.

Manipulating Properties on page 51. Creating and modifying properties and property groups.

Configuring the SOA Systinet UI on page 65. Customizing the main tabs of SOA Systinet and creating new UI elements.

Modifying Taxonomies on page 83. Modifying the set of available taxonomies.

Deploying an Extension to SOA Systinet on page 85. Preparing and deploying your extension to SOA Systinet.

User Interface Reference on page 89. A guide to the Customization Editor user interface.

Document Conventions

The typographic conventions used in this document are:

run.bat make	Script name or other executable command plus mandatory arguments.
[--help]	A command-line option.
either | or	A choice of arguments.
replace_value	A command-line argument that should be replaced with an actual value.
{arg1 | arg2}	A choice between two command-line arguments where one or the other is mandatory.
`rmdir /S /Q System32`	Operating system commands and other user input that you can type on the command line and press **Enter** to invoke. Items in *italics* should be replaced by actual values.
`C:\System.ini`	Filenames, directory names, paths and package names.
`a.append(b);`	Program source code.
`server.Version`	An inline Java or C++ class name.
`getVersion()`	An inline Java method name.
Shift-N	A combination of keystrokes.
Service View	A label, word or phrase in a GUI window, often clickable.
New->Service	Menu choice.

Documentation Updates

This manual's title page contains the following identifying information:

- Software version number
- Document release date, which changes each time the document is updated
- Software release date, which indicates the release date of this version of the software

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1 Getting Started

The Customization Editor is used to create extensions to the core SOA Systinet configuration. The core configuration itself is not modified. Instead, SOA Systinet includes a utility for adding extensions to the configuration.

This chapter describes:

- Introduction to the Customization Editor on page 14 gives an overview of the use of the Customization Editor.
- Customizable Elements of SOA Systinet on page 15 describes the elements of SOA Systinet that are configurable using the Customization Editor.
- Creating an Extension Project on page 21 describes how to start a new project to configure SOA Systinet.
- Introduction to the User Interface on page 23 explains the main features of the Customization Editor user interface.
- Navigating the Customization Editor on page 25 describes the layout of the Extension Explorer – the main navigation view in the editor.
- Customization Editor Menu Options on page 29 describes the Customization Editor options in the Eclipse drop-down menus.
- Searching the Extension on page 30 explains how to use the search function to find elements in the extensions.

Introduction to the Customization Editor

SOA Systinet is distributed with a preconfigured data model and user interface. For typical deployment scenarios, both need to be customized to fit an organization specific environment.

HP Systinet provides a mechanism to customize both the model and the appearance of the user interface, implement those changes and keep them isolated in a so-called extension package that can then be re-applied during a re-installation or upgrade of SOA Systinet.

The overall process of customizing SOA Systinet is as follows:

1. Use the Customization Editor to:
   - Modify the data model and user interface as described in:
     - Manipulating Artifact Types on page 33
     - Manipulating Properties on page 51
     - Configuring the SOA Systinet UI on page 65
     - Modifying Taxonomies on page 83
   - Save your modifications to a stand-alone extension package file as described in Exporting the Extension Project on page 85.
2. Use the Setup Tool provided with SOA Systinet to apply the extension package to an installation of SOA Systinet as described in Applying Extensions on page 86.

Special care must be taken when modifying artifacts that already have instances in the repository. For example, a new installation already contains the person artifact **administrator**. Removing properties from an artifact type with instances or adding a new required property without a default value may cause instability in SOA Systinet. The Customization Editor should prevent this if the SOA Systinet server is running during modification.

Customizable Elements of SOA Systinet

The Customization Editor enables you to modify almost any aspect of an installation of SOA Systinet. These aspects consist of two main groups:

- **SDM Entities** are the building blocks that represent the types of entity that exist in the repository defined by the SOA Definition Model. These are described in more detail in SDM Elements on page 16.
- **UI Entities** are the elements of the SOA Systinet user interface. These are described in UI Elements on page 17.

SDM Elements

The Customization Editor deals with four types of entity in the SDM configuration of SOA Systinet:

- **Artifacts** are the basic building blocks of SOA. Every entity in the repository is an instance of an artifact. Each type of artifact is defined by an artifact type in the SDM. Artifact types are further categorized into artifact packages. These packages are abstract artifact types that do not have instances in the repository but instead define groups of artifacts.

  Artifact types and packages are visible in the **Artifact Types** branch of the **Extension Explorer** (see Artifact Types on page 26) and artifact type procedures are described in Manipulating Artifact Types on page 33.

- **Properties** are the attributes of artifacts. Properties are the labels that distinguish one instance of an artifact from another. For example, all artifact instances have the **name** property descriptor but every artifact has a different name.

  Properties are visible in the **SDM Details** branch of the **Extension Explorer** (see SDM Details on page 27) and property procedures are described in Manipulating Properties on page 51.

- **Property Groups** enable property descriptors to be organized and added to artifacts as a group instead of individually. For example; name, address, and telephone number could be organized into a contact details property group and then whenever a new artifact type is created that represents a person, the group can be added to it instead of the individual properties.

  Property Groups are visible in the **SDM Details** branch of the **Extension Explorer** (see SDM Details on page 27) and property group procedures are described in Manipulating Properties on page 51.

- **Taxonomies** are categorization groups that each contain a set of values within a single category. For example, office location could be a taxonomic group containing a set of values representing each office in an organization.

  Taxonomies are visible in the **Taxonomies** branch of the **Extension Explorer** (see Taxonomies on page 29) and taxonomy procedures are described in Modifying Taxonomies on page 83.

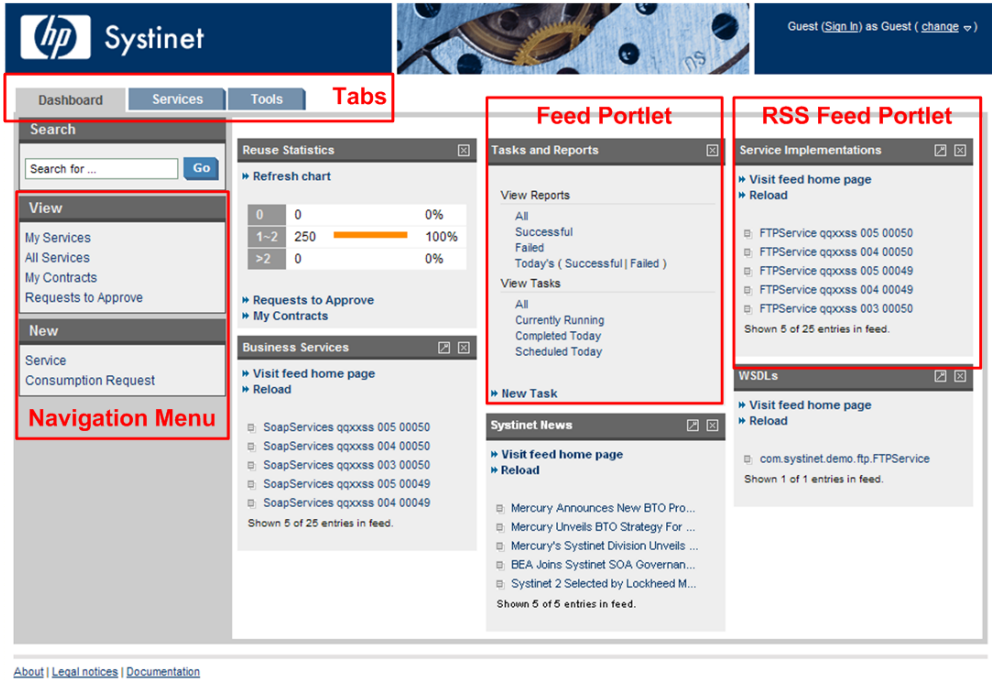
UI Elements

Two types of SOA Systinet pages are configurable:

- The main SOA Systinet tabs.
- The artifact detail and browse pages.

The main SOA Systinet tabs consist of the tab heading, a menu on the left and a set of portlets in the main area of the screen:

Figure 1. SOA Systinet Tab



The two configurable elements on SOA Systinet tabs are:

- **Navigation Menu**

  The navigation menu is organized into navigation groups and actions.

  The details for each SOA Systinet tab are accessible in the **User Interface->*SOA Systinet tab*->Navigation** branch of the **Extension Explorer** (see User Interface on page 28).

  All the navigation actions in your extension are accessible in the **User Interface->UI Details->Navigation Actions** branch in the **Extension Explorer** (see User Interface on page 28).

  Configuring the navigation actions of a SOA Systinet tab, creating and modifying navigation actions, and organizing navigation actions into groups are described in Configuring the SOA Systinet UI on page 65.

- **Portlets and Feeds**

  SOA Systinet tabs contain portlets in the main area of the screen.

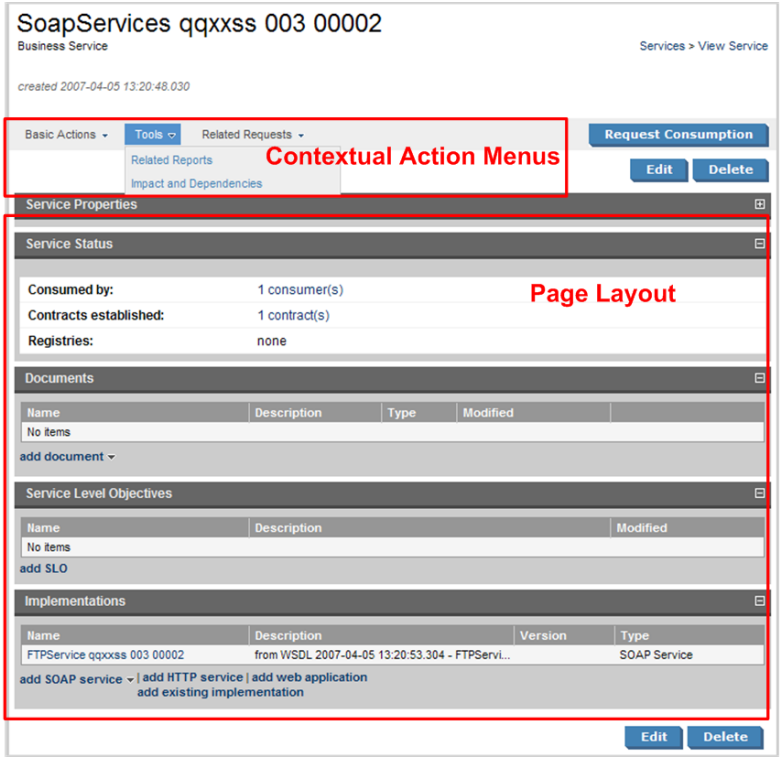
  The details for each SOA Systinet tab are accessible in the **User Interface->*SOA Systinet tab*->Portlets** branch of the **Extension Explorer** (see User Interface on page 28).

  All the portlets in your extension are accessible in the **User Interface->UI Details->Portlets Definitions** branch in the **Extension Explorer** (see User Interface on page 28).

  Configuring the portlets of a SOA Systinet tab and creating new portlets are described in Configuring the SOA Systinet UI on page 65.

Artifact pages consist of the page heading, a set of contextual menus and the main layout of the page:

Figure 2. SOA Systinet Artifact Page



The two configurable elements on artifact pages are:

- **Contextual Action Menus**

  The contextual menus are organized into UI groups and contextual actions.

  The details for each artifact type are accessible in the **Service Catalog UI** and **Tools UI** tabs of the relevant artifact editor (see Artifact Types on page 26).

All the contextual actions and groups of actions in your extension are accessible in the **User Interface->UI Details->Contextual Actions** and **Contextual Action Groups** branches in the **Extension Explorer** (see User Interface on page 28).

Configuring the contextual menus of an artifact page is described in Manipulating Artifact Types on page 33. Creating context actions and organizing them into groups is described in Configuring the SOA Systinet UI on page 65.

- **Page Layout**

  The page layout of artifact detail pages can be configured.

  The details for each artifact type are accessible in the **Service Catalog UI** and **Tools UI** tabs of the relevant artifact editor (see Artifact Types on page 26).

  Configuring the layout of an artifact page is described in Manipulating Artifact Types on page 33.

Creating an Extension Project

The first step in customizing your installation is to create an extension project in the Customization Editor. This is your workspace where you make all your modifications.

To create an extension project:

1 In the **File** menu, select **New–>HP SOA Systinet Extension Project**.

2 Complete the dialog with parameters:

Parameter	Definition
Extension Folder	Select the location of the extension folder in your SOA Systinet installation using **Browse**.
Server URL	The URL used to access SOA Systinet in the form - `http://localhost:8080/soa`

Click **Next** to select the working extension:

3 Select one of the three options:

- Create a new extension project from scratch – this creates an empty extension containing no elements at all.
- Edit an existing extension – open an extension for modification.
- Create a new extension from an existing one – use an existing extension as the basis of a new one.

For the last two options select an extension from the extension folder or use **Add Extension** to select one from another location.

Click **Next**.

Edit extension skips to step 6.

4 For the create options complete the dialog with parameters:

Parameter	Definition
Name	The name of your extension project
Namespace	The prefix used for the URI when creating a new artifact type or property
Description	A description of your extension project
Version	The extension version number
URI	The identifier for the resource in the configuration

Click **Next** to select an extension dependency.

5 For the create options you can optionally add dependencies on other extensions. By default, all extensions are dependent on the core extension.

Select an extension from the list or use **Add extension** to add an extension from outside the default extensions directory to the list. Click **Next** to set the extension properties.

6 Complete the dialog with the following parameters:

Parameter	Definition
Project Name	The ID of the new extension project
Location	Optionally, uncheck **Default Location** and use **Browse** to select a new workspace directory

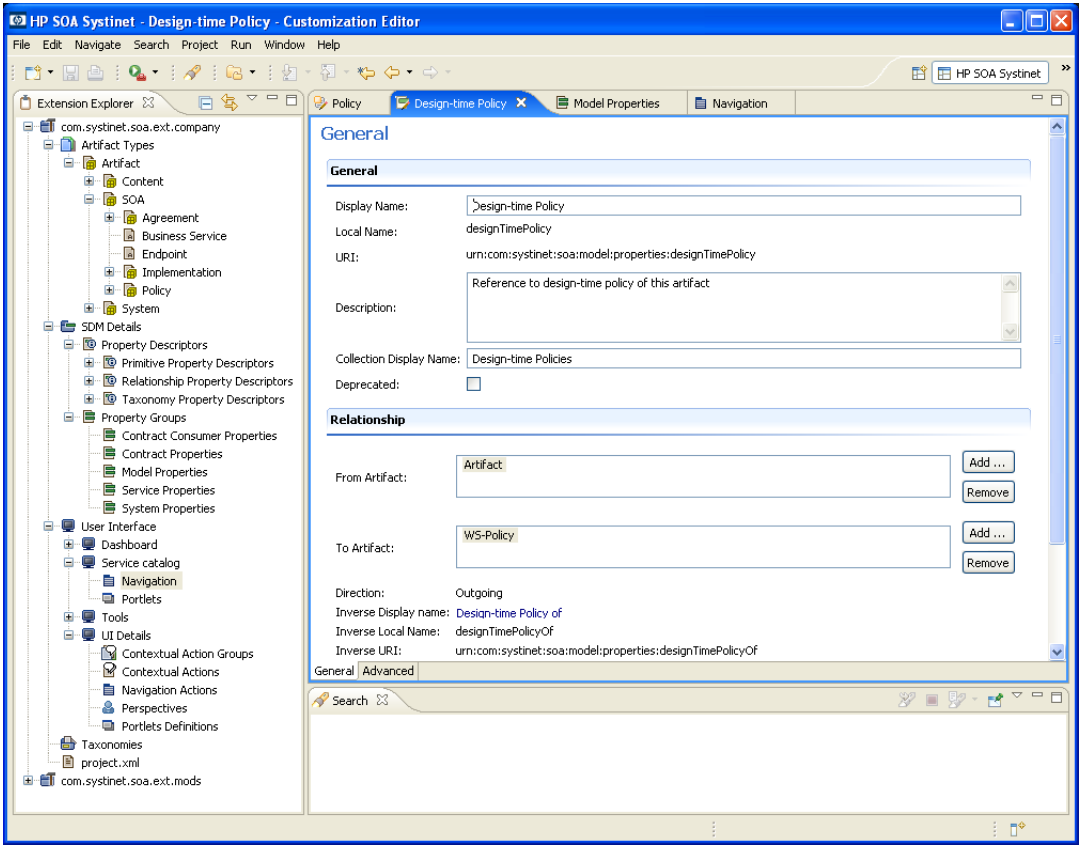
7 Click **Finish** to create the project.

The **Extension Explorer** (see Navigating the Customization Editor on page 25) now displays a view of your extension which contains not only the elements contained in the extension but all the elements from any other extensions that your project depends on.

Introduction to the User Interface

The user interface is split into three sections with menu options across the top. On the left is a tree view of the SDM configuration. The main section contains the details of the item highlighted on the left. Multiple editors can be open in this main section and the functionality varies depending on the editor. In the bottom-right are views for tracking problems, actions, and searches.

Figure 3. Customization Editor UI



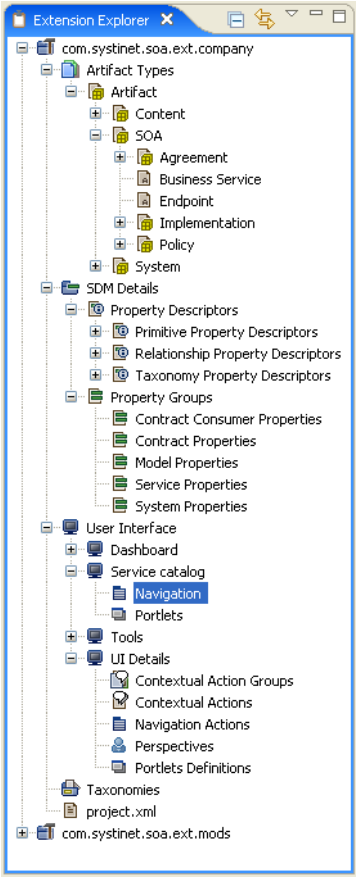
The details of the user interface are described in:

- Navigating the Customization Editor on page 25. The **Extension Explorer** is the main navigation view for the Customization Editor.
- User Interface Reference on page 89 describes the functionality of each editor and view in the main and bottom-right sections.

Navigating the Customization Editor

The **Extension Explorer** represents a tree view of the extension project that you are currently working with. It includes all the elements from extensions that it depends on as well.

Figure 4. Extension Explorer View



Double-clicking an item in the tree will open the relevant editor in the main section and also open/close a branch.

Right-clicking an element opens a context menu of options relevant to the particular element.

The tree is split into the extension root and five branches representing different elements of your extension. The functionality within each element is described in the following sections:

- Your Extension on page 26 describes the top level object in the extension.
- Artifact Types on page 26 contains the hierarchical structure of the artifact types and packages within the extension.
- SDM Details on page 27 contains properties and property groups.
- User Interface on page 28 contains the customizable elements of the SOA Systinet user interface.
- Taxonomies on page 29 accesses the categorization groups available within this extension.
- project.xml on page 29 is configuration of the current extension project.

Your Extension

The extension name is the root element of the project.

The right-click context menu contains the option to **Export Extension** which creates a `jar` containing your extension ready to import to SOA Systinet (see Deploying an Extension to SOA Systinet on page 85).

Artifact Types

The **Artifact Types** branch contains the artifact types organized into a hierarchical structure reflecting the SOA Model.

Each element below **Artifact Types** is a type of artifact and the right-click context menu has the following functionality:

- **New Artifact Type/Package** creates a new artifact type as described in Creating a New Artifact Type or Package on page 34.
- **Open Artifact Type/Package** opens the artifact editor for the selected element with the name of the element as the editor title. The functionality of this view is described in Artifact Editor on page 90.

- **Deprecate Artifact Type/Package**. After confirmation, the artifact type becomes inactive in the extension project and is hidden in the SOA Systinet UI.
- **Undeprecate Artifact Type/Package**. After confirmation, the artifact type reactivates in the extension project.
- **Delete Artifact Type/Package**. After confirmation, the artifact type is removed from the extension project.

An artifact package is an artifact type that serves a group of other artifacts. They do not have instances in the repository and just serve to organize a hierarchy of artifact types in the SDM.

SDM Details

The **SDM Details** branch contains two element types:

- **Property Descriptors** of which there are three types:
  - Primitive Property
  - Relationship Property
  - Taxonomy Property

  The parent branches contain one context menu option:

  - **New Property** opens a dialog described in Creating a New Property on page 52.

  Within each parent element is the list of properties of that type. The context menu for properties contains the following options:

  - **Open Property** opens the property editor for the selected element with the name of the element as the editor title. The functionality of this view is described in Property Editor on page 103.
  - **Deprecate Property**. After confirmation, the property becomes inactive in the extension project and is hidden in the SOA Systinet UI.
  - **Undeprecate Property**. After confirmation, the property reactivates in the extension project.
  - **Delete Property**. After confirmation, the property is removed from the extension project.

- **Find Usage** opens a search view displaying all the artifacts and property groups that contain this property as described in Search View on page 124.

- **Property Groups**

  The context menu of the parent element only has one option:

  - **New Property Group** opens a dialog described in Creating a New Property Group on page 63.

  The context menu for each property group has these options:

  - **Open Property Group** opens the property group editor for the selected element with the name of the element as the editor title. The functionality of this view is described in Property Group Editor on page 107.
  - **Delete Property Group**. After confirmation, the property group is removed from the extension project.
  - **Find Usage** opens a search view displaying all the artifacts that contain this property group as described in Search View on page 124.

User Interface

The **User Interface** branch contains a branch for each tab in the SOA Systinet UI and a **UI Details** branch containing UI elements.

The branch for each SOA Systinet tab contains two elements:

- **Navigation**. Double-click to open the view for that SOA Systinet tab allowing you to customize the menus in SOA Systinet. The functionality of the **Navigation** editor is described in Navigation Editor on page 109.
- **Portlets**. Double-click to open the view for that SOA Systinet tab allowing you to customize the portlets that are available on the selected SOA Systinet tab. The functionality of the **Portlets** editor is described in Portlets Editor on page 111.

UI Details contains five elements:

- **Contextual Action Groups** allow you to group context actions together and add them to the context options in the SOA Systinet UI. Double-click to open the view described in Contextual Action Groups Editor on page 113 or right click and select **New Context Action Group** to start the dialog described in Creating a New Context Action Group on page 76.

- **Contextual Actions** are options available within artifact and service pages in the SOA Systinet UI. Double click to open the view described in Contextual Actions Editor on page 115 or right click and select **New Context Action** to start the dialog described in Creating a New Contextual or Navigation Action on page 72.

- **Navigation Actions** are the links in SOA Systinet that navigate between pages. Double click to open the view described in Navigation Actions Editor on page 116 or right click and select **New Navigation Action** to start the dialog described in Creating a New Contextual or Navigation Action on page 72.

- **Perspectives** control the views available to users in SOA Systinet. Double click to open the view described in Perspectives Editor on page 117 or right click and select **New Perspective** to start the dialog described in Creating a New Perspective on page 79.

- **Portlets Definitions** are the components in the main section of SOA Systinet pages. Double click to open the view described in Portlets Definitions Editor on page 118 or right click and select **New Portlet** to start the dialog described in Creating a New Portlet on page 80.

Taxonomies

The **Taxonomies** branch allows you to control the taxonomies that are available within your extension project. Double-click to open the view described in Taxonomies Editor on page 119.

project.xml

The **project.xml** branch accesses the view allowing you to configure the current extension project as described in project.xml Editor on page 120.

Customization Editor Menu Options

The menus in Customization Editor are the normal Eclipse menus with the addition of specific functionality for the Customization Editor.

The extra menu options in the Customization Editor include:

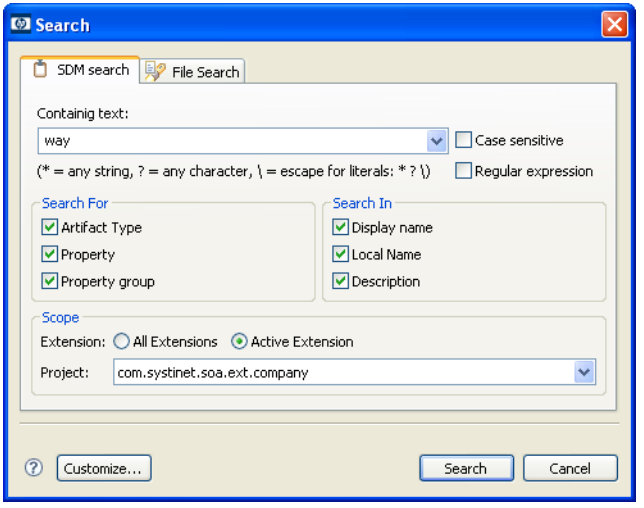
- **File->New->HP SOA Extension Project** to start a new project as described in Creating an Extension Project on page 21.
- **File->New->Artifact Type** to create a new artifact type as described in Creating a New Artifact Type or Package on page 34.
- **File->New->Artifact Package** to create a new artifact package as described in Creating a New Artifact Type or Package on page 34.
- **File->New->Property** to create a new property as described in Creating a New Property on page 52.
- **File->New->Property Group** to create a new property group as described in Creating a New Property Group on page 63.
- **Navigate->Go To->Open Artifact** to open an artifact editor as described in Artifact Editor on page 90.
- **Navigate->Go To->Open Property** to open a property editor as described in Property Editor on page 103.
- **Navigate->Go To->Open Property Group** to open a property group editor as described in Property Group Editor on page 107.
- **Search->Search** opens a search dialog as described in Searching the Extension on page 30.
- **Help->Dynamic Help** accesses context sensitive help, directing you to the relevant section of this document based on the active view in the Customization Editor.

Searching the Extension

The Customization Editor contains a customized search function that enables you to find entities in the extension.

To search the extension:

1 In the **Search** menu select **Search** to open the **Search** dialog:



2 Complete the **SDM search** dialog containing parameters:

Parameter	Definition
Containing text	The parameter to search the extension for
Case sensitive	Check the box to make the search case sensitive
Regular expression	Allows more sophisticated search parameters. For example, to find everything with more than one word. This is an advanced topic beyond the scope of this guide.
Search For	Select the SDM entities to search
Search In	Select the entity attributes to search
Scope	Select the extension to search

3 Click **Search** to execute the search and view the results in the **Search** view (see Search View on page 124).

Saving Modifications

As you modify an entity in your extension project the tab label of the entity editor is marked with an asterisk.

To save your changes to the project select **File->Save** from the **File** menu.

If you close an editor or the application with unsaved changes you are prompted to save these changes.

These changes are made to your extension project and not to the configuration of SOA Systinet. To deploy your modifications to SOA Systinet see Deploying an Extension to SOA Systinet on page 85.

2 Manipulating Artifact Types

The Customization Editor can be used to create, modify and delete artifact types in your extension project. You can also change the format of artifact pages in the SOA Systinet UI.

The chapter describes the following procedures:

- Creating a New Artifact Type or Package on page 34
- Modifying the Attributes of an Artifact Type on page 38
- Modifying the Properties of an Artifact Type on page 39
- Modifying an Artifact Type in the Services UI on page 40
- Modifying an Artifact Type in the Tools UI on page 40
- Modifying the Layout of the View Artifact Page on page 41
- Modifying the Contextual Actions of an Artifact on page 44
- Mapping an Artifact Type to a Registry on page 47

Creating a New Artifact Type or Package

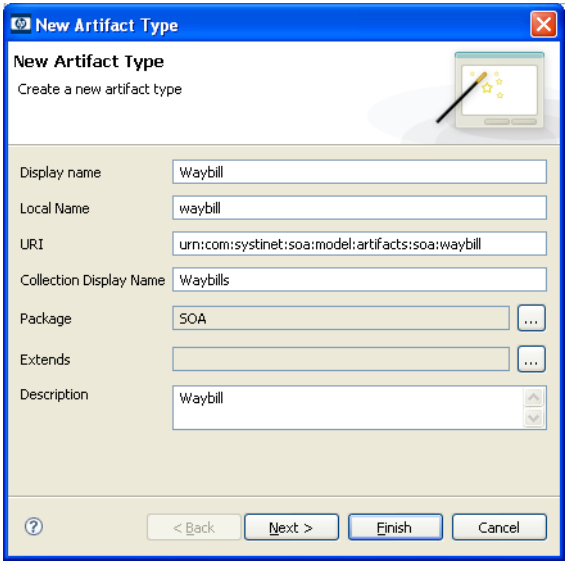
This procedure describes how to create a new artifact type or package in your extension project. For more information on artifact types and packages, see SDM Elements on page 16.

To create a new artifact type:

1 To start the **New Artifact Type** dialog:

- In the **File** menu select **New->Artifact Type/Package.**
- Alternatively, in the **Extension Explorer** right-click **Artifact Types** and select **New Artifact Type/Package**.
- Alternatively, in the **Extension Explorer** right-click an artifact package branch and select **New Artifact Type/Package** to create a new artifact type as part of that package.

The **New Artifact Type** or **New Artifact Package** dialog appears:



2 Complete the dialog which contains the following parameters:

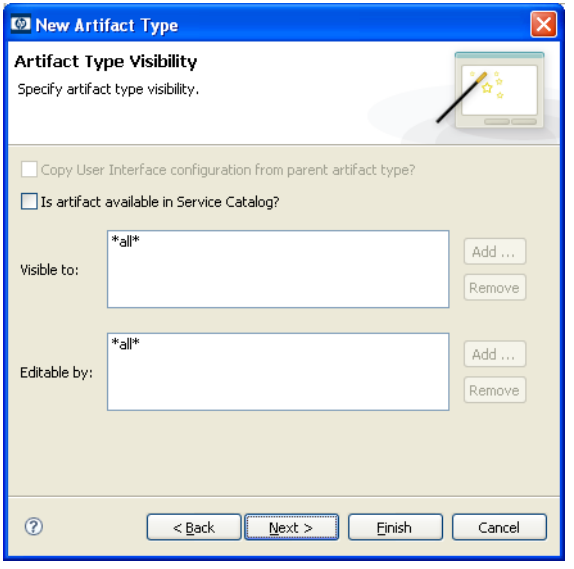
Parameter	Definition
Display Name	The name of the artifact as it appears in the SOA Systinet UI
Local Name	The name of the artifact as it is stored in the extension
URI	The identifier for the resource in the configuration
Collection Display Name	The plural name of the artifact as it appears in the SOA Systinet UI
Package	A browse button allows you to select the parent artifact type that this artifact type belongs to
Extends	A browse button allows you to select an artifact type to inherit the properties from
Description	The description of the artifact type as it appears in the SOA Systinet UI

3 Do one of the following:

- Click **Finish** to create the artifact type.
- Continue to Step 4 to set the visibility of the artifact in the SOA Systinet UI.

4 Click **Next**.

The **New Artifact Type/Package** displays visibility parameters:



5 Complete the dialog which contains the following parameters:

Parameter	Definition
Copy User Interface configuration from parent artifact type?	If the new artifact type extends an artifact with an existing UI configuration check the box if you want it to inherit these attributes
Is the artifact available in Service Catalog?	Check the box if the artifact type is visible in the Service UI
Visible to	Use **Add** and **Remove** to select viewing permissions in the SOA Systinet UI
Editable by	Use **Add** and **Remove** to select edit permissions in the SOA Systinet UI

6 Do one of the following:

- Click **Finish** to create the artifact type.
- Continue to Step 7 to set database parameters.

7 Click **Next**.

The **New Artifact Type/Package** displays database settings.

These settings cannot be changed if the new artifact extends an artifact type that already defines them.

Complete the dialog which contains the following parameters:

Parameter	Definition
Collection name	The name of collection where the artifact instances are stored
Database table name	The name of the database table where instances of this artifact are stored

8 Click **Finish** to create the artifact type.

Modifying the Attributes of an Artifact Type

To edit the main attributes of an artifact type:

1 Open the artifact editor in the **General** tab.

2 The **General** tab displays three editable segments:

- **Artifact General Information** contains four editable parameters:

Parameter	Definition
Display Name	The name of the artifact as it appears in the SOA Systinet UI
Collection Display Name	The plural version of the name as it appears in the SOA Systinet UI
Description	The description of the artifact type as it appears in the SOA Systinet UI
Deprecated	A checkbox indicating whether the artifact is currently active in the extension

- **Visible to**

  Use **Add** and **Remove** to select the perspectives that can see this artifact type within SOA Systinet.

- **Editable by**

  Use **Add** and **Remove** to select the perspectives that can amend this artifact type within SOA Systinet.

Modifying the Properties of an Artifact Type

To add or modify the properties and property groups of an artifact type:

1. Open the artifact editor and click the **Properties** tab.
2. The **Properties** tab contains two modifiable segments:
   - **Properties**:
     - Click **New** to create a new property as an attribute of the artifact type and create the property as described in Creating a New Property on page 52.
     - Click **Add** to select a property to add to the artifact type with a selected cardinality and Tools UI appearance option.
     - Click **Deprecate** to deactivate the property in the artifact type.
     - Click **Undeprecate** to reactivate a deprecated property in the artifact type.
     - Select a property and click **Remove** to remove the property from the artifact type.
   - **Property Groups**:
     - Click **New** to create a new property group as a set of attributes of the artifact type as described in Creating a New Property Group on page 63.
     - Click **Add** to add a property group to the artifact type.
     - Select a property group and click **Remove** to remove the group from the artifact type.

Modifying an Artifact Type in the Services UI

To configure the appearance of an artifact type in the **View Artifact** page in the **Services** UI:

1. Open the artifact editor and click the **Service Catalog UI** tab.
2. Check the **Is artifact available in Service Catalog?** box to make the artifact type visible in the Services UI.
3. If the artifact type is available in the Service UI there are two elements of the **View Artifact** page that can be modified:
   - To modify the layout of the **View Artifact** page see Modifying the Layout of the View Artifact Page on page 41.
   - To modify the contextual actions in the **View Artifact** page see Modifying the Contextual Actions of an Artifact on page 44.

Modifying an Artifact Type in the Tools UI

To modify the appearance of an artifact type in the **View Artifact** and **Browse Artifact** pages of the **Tools** UI:

1. Open the artifact editor and click the **Tools UI** tab.
2. There are two elements of the **View Artifact** and **Browse Artifact** pages in the **Tools** UI that can be modified:
   - To modify the layout of the **View Artifact** page see Modifying the Layout of the View Artifact Page on page 41.
   - To modify contextual actions in the **View Artifact** page or the **Browse Artifact** page see Modifying the Contextual Actions of an Artifact on page 44.

Modifying the Layout of the View Artifact Page

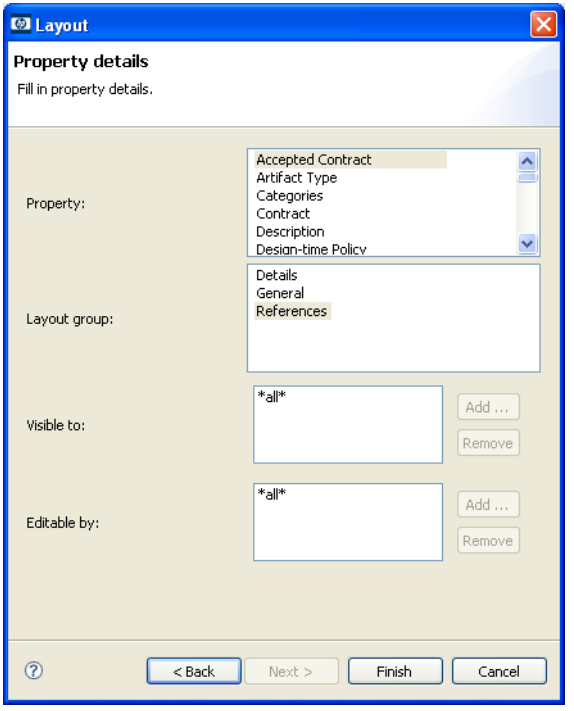
The **View Artifact** page shows the details of an artifact in both the **Services** and **Tools** tabs of SOA Systinet. The elements that appear there can be modified with the Customization Editor.

To modify the layout:

1. Open the artifact editor and click the **Service Catalog UI** or **Tools UI** tab according to which view you want to modify.
2. In the **Layout** segment:
   - To change the order of elements, select the element and click **Up** and **Down**.
   - To remove an element select it and click **Remove**.
   - To edit an element select it, click **Edit** and modify the same parameters as appear in the **Add** functions.
   - To add an element click **Add**:
     - To add a new layout heading, in which to group properties and components, select **Group**, input a name for the group and click **Finish** to add it to the layout.

- To add a property:

  a. Select **Property** and click **Next** to open the **Layout Property Details** dialog:



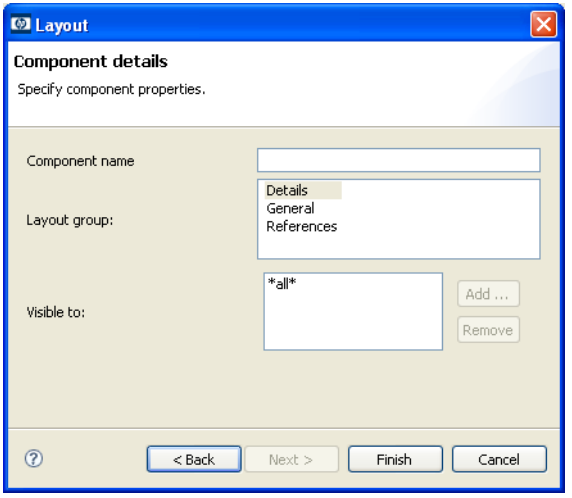
  b. Complete the dialog with the following parameters:

Parameter	Definition
Property	Select one of the properties to be displayed in the layout
Layout Group	Select the layout heading that the property is part of
Visible to	Use **Add** and **Remove** to select the perspectives that can see the property
Editable by	Use **Add** and **Remove** to select the perspectives that can edit the property

c Click **Finish** to add the property to the layout.

- To add a new functional UI component:

a Select **Component** and click **Next** to open the **Layout Component Details** dialog:



b Complete the dialog with the following parameters:

Parameter	Definition
Component Name	The name of the component as it appears in the SOA Systinet UI
Layout Group	Select the layout heading that the component is part of
Visible to	Use **Add** and **Remove** to select the perspectives that can see the component
Editable by	Use **Add** and **Remove** to select the perspectives that can edit the component

c Click **Finish** to add the component to the layout.

This component must also be created using an external development tool and implemented in the UI configuration. See **Known Issues** in `readme/readme_eclipse.html` in the Customization Editor installation directory for more details.

Modifying the Contextual Actions of an Artifact

At the top of the **View Artifact** page in both **Services** and **Tools** and the **Browse Artifact** page in **Tools** is a section containing sets of **Contextual Actions**. The actions that appear there can be modified with the Customization Editor.

To modify the contextual actions in these pages:

1. Open the artifact editor and click the **Service Catalog UI** or **Tools UI** tab according to which view you want to modify.
2. In the **Contextual Actions** segment:

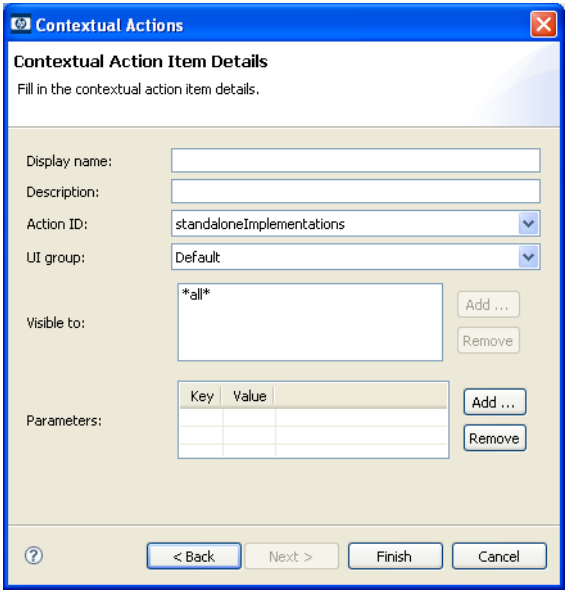
In the **Tools UI** tab this segment contains two tabs:

- **Artifact Detail** refers to the **View Artifact** page.
- **Collection** refers to the **Browse Artifact** page.

- To change the order of actions, select the action and click **Up** and **Down**.
- To remove an action select it and click **Remove**.
- To edit an action element select it, click **Edit** and modify the same parameters as appear in the **Add** functions.
- To add an action element click **Add**:
  - To add a contextual menu heading select **UI Group**, input a display name for the group and click **Finish** to add it to the context menu.

- To add a contextual action item:

  a. Select **Contextual action item** and click **Next** to open the **Contextual Action Item Details** dialog:



  b. Complete the dialog which contains the following parameters:

Parameter	**Definition**
Display Name	The name of the action as it appears in the SOA Systinet UI
Description	The description of the context action
Action	Select the action from the list
UI Group	Select the action menu that the action is part of
Visible to	Use **Add** and **Remove** to select the perspectives that can see the property
Parameters	Additional parameters if required by the action item

c Click **Finish** to add the element to the context action menu.

- To add a set of contextual actions to the menu:

  a Select **Contextual action group reference** and click **Next** to open the **Group reference detail** dialog.

  b Select the **Contextual action group** for the required set of actions and the **UI group** that the actions appears in and click **Finish** to add the set of actions to the contextual menus.

Mapping an Artifact Type to a Registry

Artifacts in SOA Systinet can be mapped to registry entities in a UDDI registry.

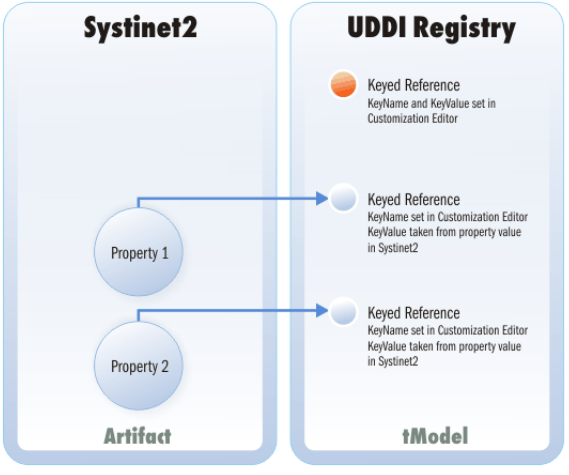
The following artifact types have predefined mappings to registry and cannot be amended:

Table 1. Predefined Registry Mapping

SDM artifact	UDDI entity	Direction
Organizational Unit	BusinessEntity	Bi-directional
Business Service	tModel	Bi-directional
Implementation Artifacts	Business Service	Bi-directional
Endpoint	BindingTemplate	Bi-directional

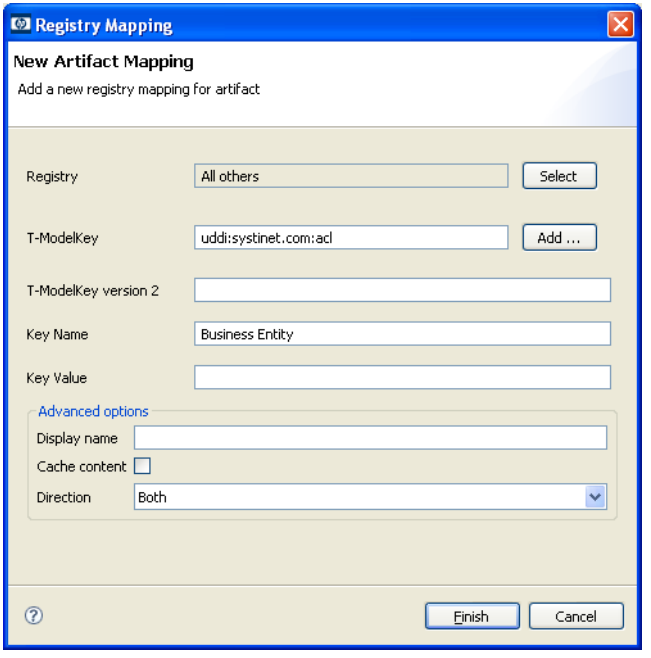
Figure 1 illustrates the mapping of an artifact to a registry entity:

Figure 1. Registry Mapping



To add or modify artifact type mappings to registry entities:

1. Open the artifact editor and click the **Registry Mapping** tab.
2. The functionality of the **Artifact Mapping** segment and **Property Mapping** is the same:
   - To edit a mapping, select the mapping, click **Edit** and modify the same parameters as appear in the **Add** functionality.
   - To remove a mapping select the mapping and click **Remove**.
   - To add a registry mapping for an artifact type:
     a. In the **Artifact Mapping** segment click **Add** to open the **New Artifact Mapping** dialog:



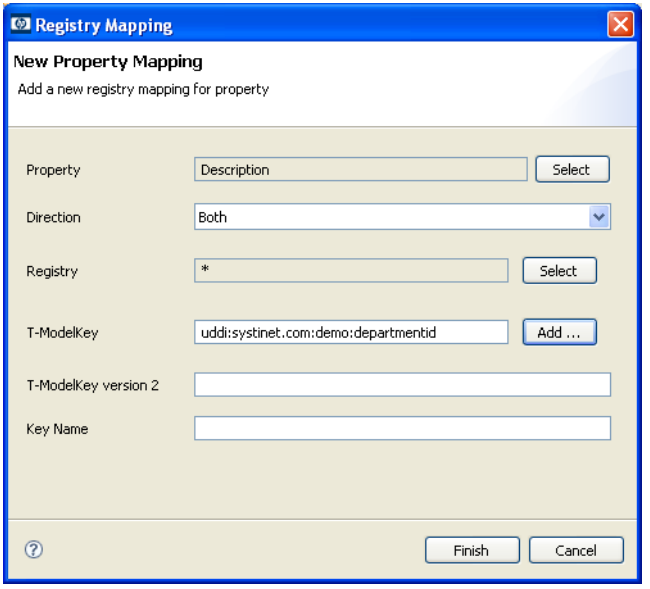
b Complete the dialog with the following parameters:

Parameter	Definition
Registry	Use **Select** to select from the available registries
T-ModelKey	Use **Add** to select from the available taxonomies or input one
T-ModelKey version 2	If you are mapping to a UDDI version 2 registry input a taxonomy key
Key Name	The name used to categorize the UDDI entity in the registry
Key Value	The value used to categorize the tModel in the registry
Display Name	The name of the mapping as it appears in the SOA Systinet UI
Cache content	If selected, the content of documents referenced from the UDDI entity are cached in SOA Systinet
Direction	Select the direction of the mapping from the drop-down list

c Click **Finish** to add the mapping.

- To add a registry mapping for a property:

  a In the **Property Mapping** segment click **Add** to open the **New Property Mapping** dialog:



b Complete the dialog with the following parameters:

Parameter	Definition
Property	Use **Select** to select from the available properties
Direction	Select the direction of the mapping from the drop-down list
Registry	Use **Select** to select from the available registries
T-ModelKey	Use **Add** to select from the available taxonomies or input one
T-ModelKey version 2	If you are mapping to a UDDI version 2 registry input a taxonomy key
Key Name	The name used to categorize the UDDI entity in the registry

c Click **Finish** to add the mapping.

3 Manipulating Properties

The Customization Editor enables you to create, modify and delete properties and property groups in your extension project.

The property procedures are:

- Creating a New Property on page 52 describes how to create properties of types:
  - Primitive
  - Relationship
  - Taxonomy
- Modifying a Property on page 60
- Creating a New Property Group on page 63
- Modifying a Property Group on page 64

Manipulating Artifact Types on page 33 includes these procedures which are also related to properties:

- Modifying the Properties of an Artifact Type on page 39 describes how to add properties to an artifact.
- Mapping an Artifact Type to a Registry on page 47 describes how to add registry mappings to an artifact and its properties.

Creating a New Property

This procedure describes how to create a new property descriptor in your extension project. For more information on properties, see SDM Elements on page 16.

To create a new property:

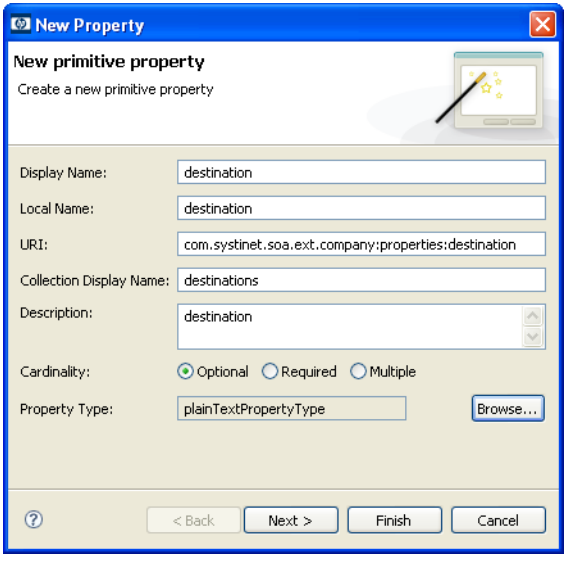
1. To start the **New Property** dialog:

   - In the **File** menu select **New->Property**.
   - Alternatively, in the **Extension Explorer** right-click **Property Descriptors** and select **New Property** and the property type.
   - Alternatively, in the **Extension Explorer** right-click a property type branch and select **New Type Property** to create a property of that type.

   The **New Property** dialog appears.

2 A different dialog opens depending on the property type:

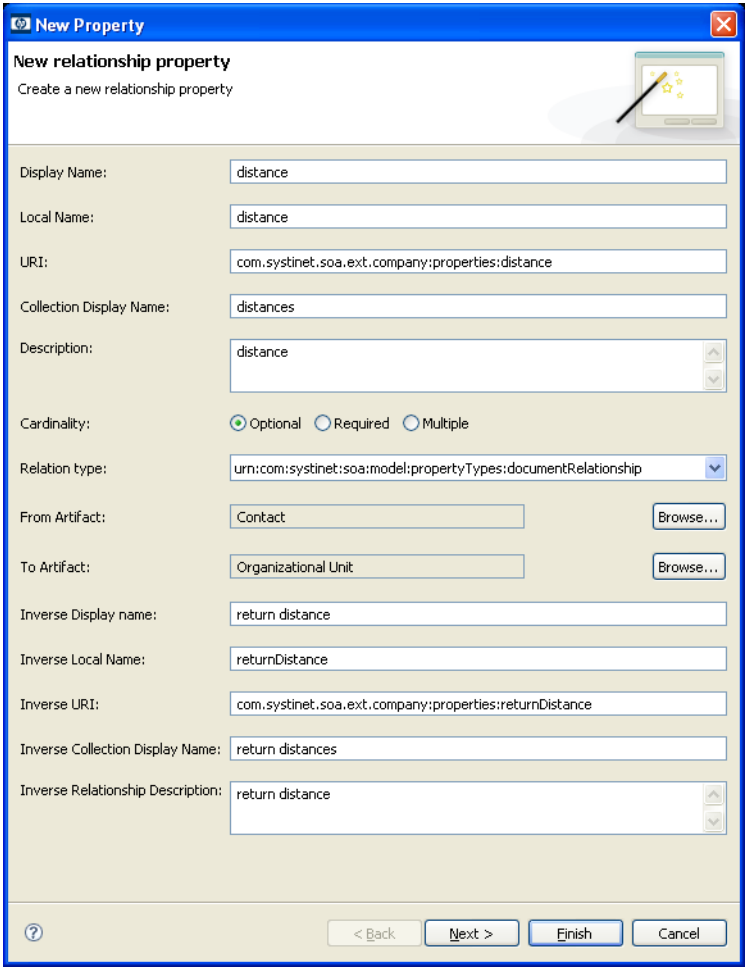
- For primitive properties:



Complete the dialog which contains the following parameters:

Parameter	Definition
Display Name	The name of the property as it appears in the SOA Systinet UI
Local Name	The name of the property as it is stored in the extension
URI	The identifier for the resource in the configuration
Collection Display Name	The plural name of the property as it appears in the SOA Systinet UI
Description	The description of the property as it appears in the SOA Systinet UI
Cardinality	The occurrence of the property in an artifact with options: • **Optional.** The property is not required to be populated • **Required.** The property must be populated • **Multiple.** The property can occur multiple times with different values
Property Type	Use **Browse** to select a property from the available primitive property types

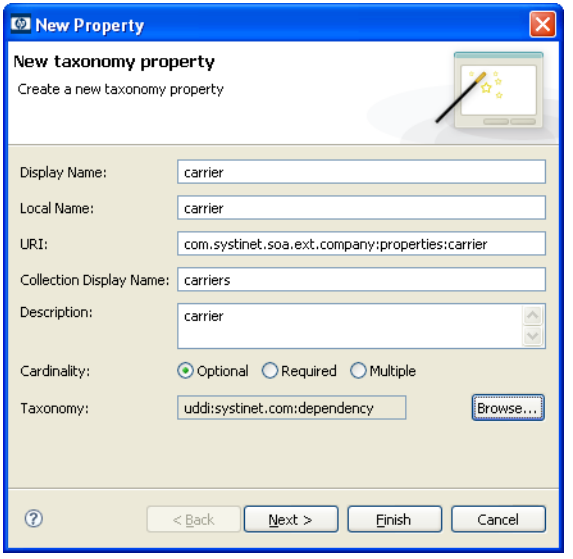
- For relationship properties which are created in pairs:



Complete the dialog which contains the following parameters:

Parameter	Definition
Display Name	The name of the property as it appears in the SOA Systinet UI
Local Name	The name of the property as it is stored in the extension
URI	The identifier for the resource in the configuration
Collection Display Name	The plural name of the property as it appears in the SOA Systinet UI
Description	The description of the property as it appears in the SOA Systinet UI
Cardinality	The occurrence of the property in an artifact with options: • **Optional.** The property is not required to be populated • **Required.** The property must be populated • **Multiple.** The property can occur multiple times with different values
Relation Type	Select a type from the drop-down list
From Artifact	Use **Browse** to select the source artifact type of the relationship
To Artifact	Use **Browse** to select the target artifact type of the relationship
Inverse Display Name	The name of the inverse relationship property as it appears in the SOA Systinet UI
Inverse Local Name	The name of the inverse relationship property as it is stored in the extension
Inverse URI	The identifier for the resource in the configuration
Inverse Collection Display Name	The plural name of the inverse relationship property as it appears in the SOA Systinet UI
Inverse Relationship Description	The description of the inverse relationship property as it appears in the SOA Systinet UI

- For taxonomy properties:



Complete the dialog which contains the following parameters:

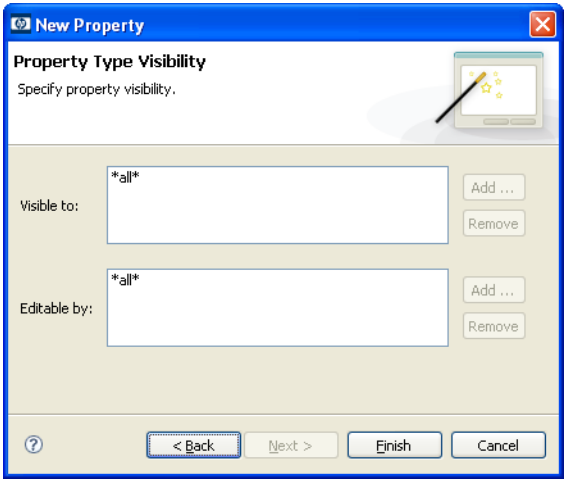
Parameter	Definition
Display Name	The name of the property as it appears in the SOA Systinet UI
Local Name	The name of the property as it is stored in the extension
URI	The identifier for the resource in the configuration
Collection Display Name	The plural name of the property as it appears in the SOA Systinet UI
Description	The description of the property as it appears in the SOA Systinet UI
Cardinality	The occurrence of the property in an artifact with options: • **Optional.** The property is not required to be populated • **Required.** The property must be populated • **Multiple.** The property can occur multiple times with different values
Taxonomy	Use **Browse** to select a taxonomy from the available taxonomies

3 Do one of the following:

- Click **Finish** to create the property.
- Continue to Step 4 to set property visibility.

4 Click **Next**.

The **New Property** dialog displays visibility parameters:



5 Complete the dialog which contains the following parameters:

Parameter	Definition
Visible to	Use **Add** and **Remove** to select viewing permissions in the SOA Systinet UI
Editable by	Use **Add** and **Remove** to select edit permissions in the SOA Systinet UI
Tools UI group	If you are creating the property as an attribute of an artifact select the layout heading in which the property appears in the **View Artifact** page in the tools UI or select **<hidden> if the property is not visible.**

6 Click **Finish** to create the new property.

Modifying a Property

To edit a property:

1. Open the property editor.
2. Edit the general attributes of the property in the **General** tab and the advanced attributes in the **Advanced** tab.

    - The **General** tab contains four editable segments:
        - **General** contains four editable parameters:

Parameter	Definition
Display Name	The name of the property as it appears in the SOA Systinet UI
Description	The description of the property as it appears in the SOA Systinet UI
Collection Display Name	The plural version of the name as it appears in the SOA Systinet UI
Deprecated	A checkbox indicating whether the property is currently active in the extension

        - There are three types of property and the second segment is specific to each:
            - **Property Type**

              Primitive properties are not editable and just display the property type.
            - **Relationship**

              Use **Add** and **Remove** to select the endpoints of the relationship.
            - **Taxonomy**

              Use **Browse** to select a new taxonomy from the extension project.

- **Visible to**

  Use **Add** and **Remove** to select the perspectives that can see this property within SOA Systinet.

- **Editable by**

  Use **Add** and **Remove** to select the perspectives that can amend this property within SOA Systinet.

- The **Advanced** tab contains three editable segments:

  - **Cardinality** contains three editable parameters:

Parameter	Definition
Cardinality	The occurrence of the property in an artifact with options: • **Optional.** The property is not required to be populated • **Required.** The property must be populated • **Multiple.** The property can occur multiple times with different values
MinOccurs	For multiple cardinality enter a minimum number of instances of the property
MaxOccurs	For multiple cardinality enter a maximum number of instances of the property. Use `unbounded` if there is no limit.

- **Default Values** contains two editable parameters:

Parameter	Definition
Default Value	Default value is described by an XML element which must follow the rules defined by XML schema for the selected property and property type. For example, a primitive plain text property with local name email is defined by `<p:email xmlns:p="http://systinet.com/2005/05/soa/model/property">value</p:email>`
Multiple Default Value	If the property has multiple cardinality then specify more than one default value. For example, a plain text property with local name email and multiple cardinality is defined by `<g:emailGroup xmlns:g="http://systinet.com/2005/05/soa/model/propertyGroup" xmlns:p="http://systinet.com/2005/05/soa/model/property"> <p:email>value1</p:email> <p:email>value2</p:email> </g:emailGroup>`

- **Database Sizes** enables you to optionally set the storage size of property elements with **Add**, **Edit** and **Remove** functionality.

Creating a New Property Group

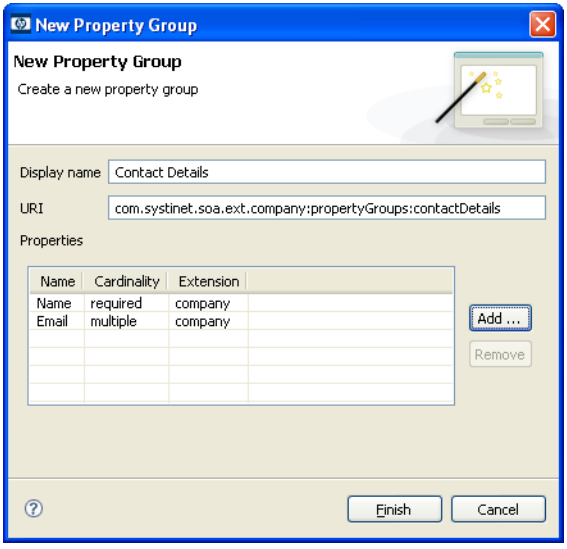
As many artifacts share sets of the same properties it is useful to create groups of properties and add these to the artifacts instead.

To create a new property group:

1 To start the **New Property Group** dialog:

- In the **File** menu select **New->Property Group.**
- Alternatively, in the **Extension Explorer** right-click **Property Groups** and select **New Property Group**.
- Alternatively, in the artifact **Properties** tab click **New** in the **Property Groups** segment to create a new group as a set of attributes for an artifact type.

The **New Property Group** dialog appears:



2 Complete the dialog which contains the following parameters:

Parameter	Definition
Display Name	The name of the property group as it appears in the SOA Systinet UI
URI	The identifier for the resource in the configuration
Properties	Use **Add** and **Remove** to select the properties in the group

3 Click **Finish** to create the property group.

Modifying a Property Group

To edit a property group:

1 Open the property group editor.

2 Modify the property group with one of the following functions:

- Edit the **General** segment to change the display name of the property group.
- Click **New** under **Properties** to create a new property as part of the group as described in Creating a New Property on page 52.
- Click **Add** to add a property to the group from the list of available properties.
- Click **Remove** to remove a property from the group.

4 Configuring the SOA Systinet UI

The main tabs in SOA Systinet can be modified and also the appearance of artifact pages can be altered using the Customization Editor

The procedures for altering the appearance of artifact pages are in Manipulating Artifact Types on page 33. This section deals with creating and modifying UI elements and modifying the appearance of the main SOA Systinet tabs.

The available procedures are:

- **Adding Portlets to a SOA Systinet Tab on page 66.**
- **Adding Navigation Groups to a SOA Systinet Tab on page 68.**
- **Adding Navigation Actions to a SOA Systinet Tab on page 69.**
- **Adding Components to a SOA Systinet Tab on page 71.**
- **Creating a New Contextual or Navigation Action on page 72.**
- **Modifying a Contextual or Navigation Action on page 75.**
- **Creating a New Context Action Group on page 76.**
- **Adding Context Actions to a Group on page 77.**
- **Creating a New Portlet on page 80.**
- **Creating a New RSS Feed Portlet on page 81.**
- **Creating a New Perspective on page 79.**

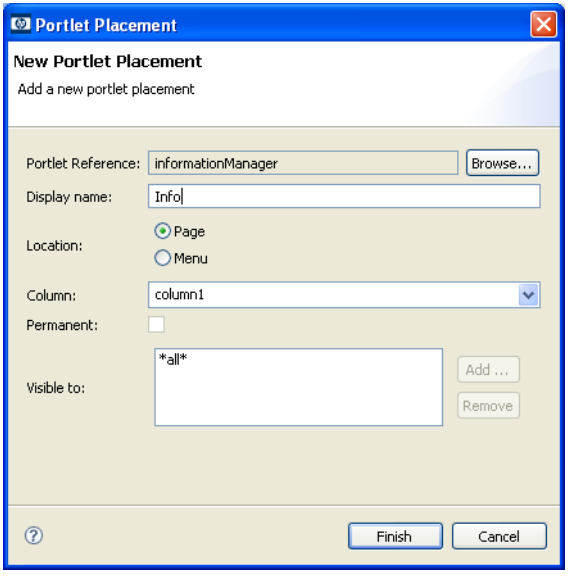
Adding Portlets to a SOA Systinet Tab

The Customization Editor can be used to configure the portlets that are available in each tab in SOA Systinet and where they appear on the tab.

To add portlet to a SOA Systinet tab:

1 Open the **Portlets** editor for the SOA Systinet tab you want to modify.

2 Click **Add** to open the **New Portlet Placement** dialog:



3 Complete the dialog which contains the following parameters:

Parameter	Definition
Portlet Reference	Click **Browse** to select from the available portlets
Display Name	The name of the portlet as it appears in the SOA Systinet UI
Location	There are two options: • **Page.** The portlet is open in the main area of the SOA Systinet tab • **Menu.** The portlet is closed but available to add in the left menu
Column	If the portlet is located on the page then use the drop-down list to select which column it appears in
Permanent	If **Menu** is selected check this box to enable multiple instances of the portlet.
Visible to	Use **Add** and **Remove** to select the perspectives that can see the portlet

4 Click **Finish** add the portlet to the SOA Systinet tab.

Adding Navigation Groups to a SOA Systinet Tab

The Customization Editor can be used to configure the menu in each SOA Systinet tab. The items in the menu are organized into groups and these groups can be added to the menu instead of individual items.

To add a navigation group to an SOA Systinet tab:

1. Open the **Navigation** editor for the SOA Systinet tab you want to modify.
2. Click **Add** to open the **Choose Type** dialog.
3. Select **Group** and click **Next** to open the **Group Details** dialog.
4. Complete the dialog which contains the following parameters:

Parameter	Definition
Group Name	The name of the group heading as it appears in the SOA Systinet UI
Description	A description of the new navigation group

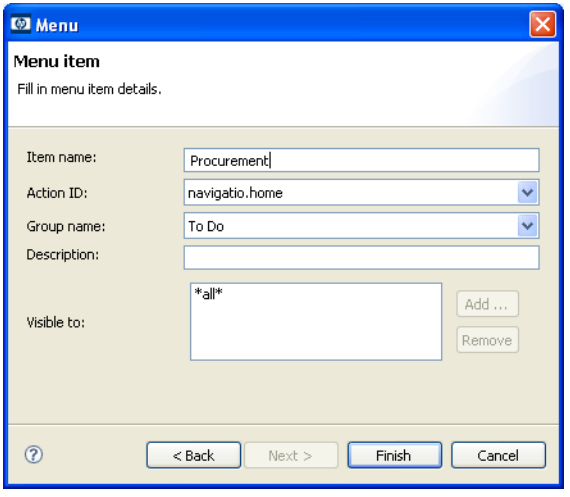
5. Click **Finish** add the group to the SOA Systinet tab menu.

Adding Navigation Actions to a SOA Systinet Tab

The Customization Editor can be used to configure the menu in each SOA Systinet tab. Each item in the menu corresponds to a navigation action linking to another page in SOA Systinet.

To add a navigation item to an SOA Systinet tab:

1. Open the **Navigation** editor for the SOA Systinet tab you want to modify.
2. Click **Add** to open the **Choose Type** dialog.
3. Select **Item** and click **Next** to open the **Menu Item** dialog:



4 Complete the dialog which contains the following parameters:

Parameter	Definition
Item Name	The name of the navigation link as it appears in the SOA Systinet UI
Action ID	Select the Navigation Action from the drop-down list
Group Name	Select the menu heading that the item is part of from the drop-down list
Description	A description of the new navigation item
Visible to	Use **Add** and **Remove** to select the perpectives that can see the item

5 Click **Finish** add the item to the SOA Systinet tab menu.

Adding Components to a SOA Systinet Tab

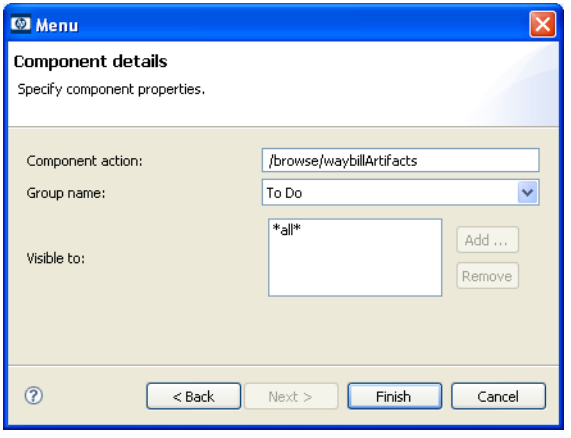
The Customization Editor can be used to configure the left-menu in each tab in SOA Systinet. Some items in the menu are links to a component that performs specific functionality.

To add a component to a SOA Systinet tab:

1 Open the **Navigation** editor for the SOA Systinet tab you want to modify.

2 Click **Add** to open the **Choose Type** dialog.

3 Select **Component** and click **Next** to open the **Component Details** dialog:



4 Complete the dialog which contains the following parameters:

Parameter	Definition
Component Action	The identification of the component
Group Name	Select the menu heading that the component is part of from the drop-down list
Visible to	Use **Add** and **Remove** to select the perspectives that can see the component

5 Click **Finish** add the component to the SOA Systinet tab menu.

Creating a New Contextual or Navigation Action

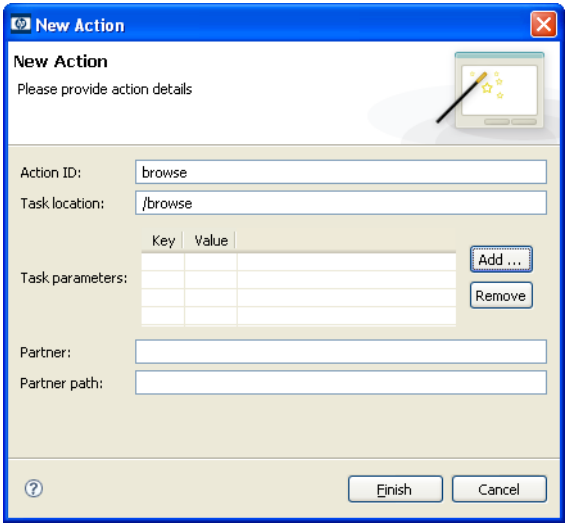
Contextual and navigation actions are both links to pages in SOA Systinet

To create a new action:

1 To open the **New Action** dialog:

- Right-click the **Contextual Actions** or **Navigation Actions** branch in the **Extension Explorer** and select **New *Type* Action**.
- Alternatively, click **New** in the **Contextual Actions** or **Navigation Actions** editor.

The **New Action** dialog appears:



2 Complete the dialog which contains the following parameters:

Parameter	Definition
Action ID	The identification of the contextual or navigation action
Task Location	The name of the action that for: • Contextual actions – renders this link in the context actions menus • Navigation actions – is called when the user clicks the link
Task Parameters	Use **Add** and **Remove** to select the task parameters for the navigation or contextual action specified in **Task Location** which consist of: • **Key**. The name of the parameter • **Value**. The value of the parameter
Partner	The name of the SSO partner
Partner Path	A relative URL pointing to the resource, that is accessed via SSO

3 Click **Finish** to create the new action.

The full URL is compiled from the base URL retrieved from the DB (where the key is the name of the SSO Partner) and the relative URL.

If SSO is not needed to render the context action / menu item, then only the task location and task parameters are used. If SSO is required (the context action or menu item references a task/resource in a different product than it is rendered in) then the target URL is composed from partner, partner path and task parameters.

For example:

```
<action id="tools.newOther">
  <partner>@platform.sso.identity.id</partner>
  <partnerPath>web/publishing/structuredFile/wizard</partnerPath>
  <task location="/publishing/structuredFile/wizard">
    <parameter key="FirstUIStateID">fileDetails</parameter>
  </task>
</action>
```

The SSO URL is composed from e.g. http://johngalt:8080/soa/systinet/platform/ + web/publishing/structuredFile/wizard + ? + FirstUIStateID=fileDetails to final form http://johngalt:8080/soa/systinet/platform/web/publishing/structuredFile/wizard?FirstUIStateID=fileDetails

Modifying a Contextual or Navigation Action

To modify an action:

1. Open the **Contextual Actions** or **Navigation Actions** editor according to which type of action you want to modify.
2. Select the action to modify and click **Edit**.
3. Complete the dialog which contains the following parameters:

Parameter	Definition
Action ID	The identification of the contextual or navigation action
Task Location	The name of the action that for: • Contextual actions – renders this link in the context actions menus • Navigation actions – is called when the user clicks the link
Task Parameters	Use **Add** and **Remove** to select the task parameters for the navigation or contextual action specified in **Task Location**. The parameters consist of: • **Key**. The name of the parameter • **Value**. The value of the parameter
Partner	The name of the SSO partner
Partner Path	The URL pointing to the resource accessed by the action

4. Click **Finish** to confirm your changes.

Creating a New Context Action Group

As many artifact types share sets of the context actions it is useful to make groups of actions and add these to artifact types instead.

To create a new context action group:

1. To open the **Contextual Actions** dialog:
   - In the **Extension Explorer** right-click the **Contextual Action Groups** branch and select **New Context Action Group**.
   - Alternatively, click **Add** in the Contextual Action Groups editor.
2. Select **Group of Contextual Actions** and click **Next**.
3. Input the display name for the group and click **Finish** to create the contextual action group.

Adding Context Actions to a Group

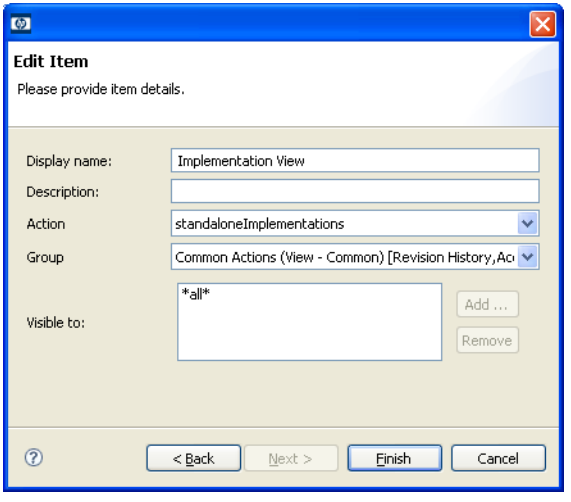
As many artifact types share sets of the context actions it is useful to make groups of actions and add these to artifact types instead.

To add a context action to a group:

1 To open the **Contextual Actions** dialog:

- In the **Extension Explorer** right-click the **Contextual Action Groups** branch and select **New Context Action Group**.
- Alternatively, click **New** in the Contextual Action Groups editor.

2 Select **Action Item** and click **Next** to open the **Edit Item** dialog:



3 Complete the dialog which contains the following parameters:

Parameter	Definition
Display Name	The name of the context action item
Description	A description of the item
Action	Select the action to add from the drop-down list
Group	Select the group to add the action to from the drop-down list
Visible to	Use **Add** and **Remove** to select the perspectives that can see the action

4 Click **Finish** add the action to the group.

Creating a New Perspective

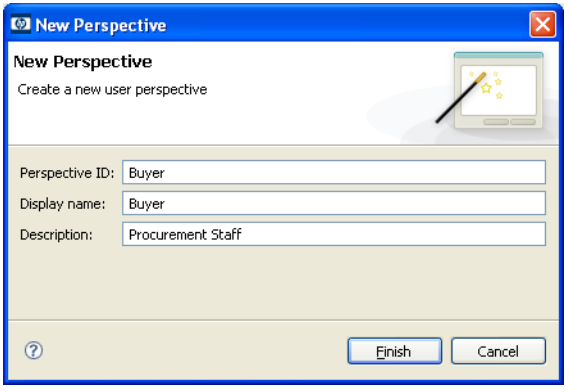
Perspectives control the views of SOA Systinet that are available to each user.

To create a new perspective:

1 To open the **New Perspective** dialog:

- In the **Extension Explorer** right-click the **Perspectives** branch and select **New Perspective**.
- Alternatively, click **New** in the **Perspectives** editor.

The **New Perspective** dialog appears:



2 Complete the dialog which contains the following parameters:

Parameter	Definition
Perspective ID	The name of the perspective in the extension project
Display Name	The name of the perspective as it appears in the SOA Systinet UI
Description	The description of the perspective as it appears in the UI

3 Click **Finish** to create the perspective.

Creating a New Portlet

Portlets are the components in the main section of SOA Systinet tabs with varying functionality depending on the portlet.

To create a new portlet:

1. In the **Extension Explorer** double-click the **Portlets Definitions** branch to open the **Portlets Definitions** editor.
2. Click **Add** and select **Portlet** to open the **Add Portlet** dialog.
3. Input a name and url for the portlet and click **Finish** to create the portlet.

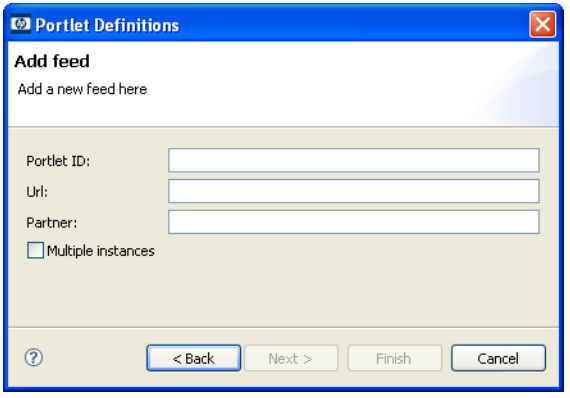
Creating a New RSS Feed Portlet

The RSS feed portlets in the main section of SOA Systinet tabs display up-to-date views of repository data or links to external RSS feeds.

To create a new RSS Feed Portlet:

1 In the **Extension Explorer** double-click the **Portlets Definitions** branch to open the **Portlets Definitions** editor.

2 Click **New** and select **Feed** to open the **Add Feed** dialog:



3 Complete the dialog which contains the following parameters:

Parameter	Definition
Portlet ID	The identification of the portlet definition
Url	The link to the RSS source
Partner	The name of the SSO partner
Multiple Instances	Check the box to allow multiple instances of the feed

Click **Finish** to create the feed.

5 Modifying Taxonomies

The Customization Editor controls which taxonomies are available in the extension project. You can create and modify taxonomies using HP SOA Systinet Taxonomy Editor.

To control taxonomies in the extension:

1 In the **Extension Explorer** double-click **Taxonomies** to open the **Taxonomies** editor.

If the SOA Systinet server specified in the **Server URL** during configuration (see Creating an Extension Project on page 21) is running then all the taxonomies in SOA Systinet are added to the list when this editor opens.

2 To modify the available taxonomies in your extension project:

- To import taxonomies from SOA Systinet and add them to the extension click **Import**.
- To update taxonomies in your extension newer versions from SOA Systinet click **Update**.
- To remove a taxonomy from the extension, select the taxonomy and click **Remove**.

6 Deploying an Extension to SOA Systinet

HP SOA Systinet Customization Editor does not deploy directly to SOA Systinet. Instead, deploying an extension to SOA Systinet is a two-part process:

1. Save your new extension project as a jar file in the SOA Systinet extension folder as described in Exporting the Extension Project on page 85.

2. Deploy the extension to SOA Systinet using the Setup Tool as described in Applying Extensions on page 86.

Exporting the Extension Project

Customization Editor displays the entire configuration of your extension plus other extensions it depends on. However, your extension only consists of any modifications and additions that you have made. Only these changes are stored when you save your project as an extension jar file and only these changes are deployed to SOA Systinet

To create your extension package:

1. Right-click the extension name in the **Extension Explorer** (see Navigating the Customization Editor on page 25and select **Export Extension** to open the export dialog.

2. By default, the **Extension Folder** set during configuration (see Creating an Extension Project on page 21) is selected. Choose a save location and file name and click **Save**.

Applying Extensions

SOA Systinet can be extended with libraries that are added into the deployed .ear files. The setup tool opens the .ear files, applies the extensions and repacks the .ear files.

Extensions to SOA Systinet come from the following sources:

- The HP SOA Systinet Customization Editor
- HP SOA Systinet Policy Manager extensions used to create assertions in HP SOA Systinet Assertion Editor. These extensions are custom validation handlers. You must apply them to the HP SOA Systinet Policy Manager server in order for HP SOA Systinet Policy Manager to use assertions created with them.
- Upgrading from the Visibility Edition to the Standard Edition, which requires HP SOA Systinet Policy Manager and Contract Manager extensions to be added to SOA Systinet.

To apply extensions to SOA Systinet:

1. Make sure that all extensions are in the `PLATFORM_HOME/extensions` directory. The setup tool automatically applies all extensions in that directory.

   If you are applying extensions to another server substitute `PLATFORM_HOME` with the relevant home directory.

2. Stop the server.
3. Start the setup tool by executing **PLATFORM_HOME/bin/setup.bat(sh)**.

   The application server to which SOA Systinet is deployed must not be running.

4. Choose the **Apply Extensions** scenario and click **Next**. The setup tool automatically validates the step by connecting to the server, copying the extensions and merging the SDM configuration.
5. Enter the path to the application server installation requiring the extension and any other parameters specific to your AS and click **Next**. The setup tool then confirms this information.

6 Click **Next** to complete the process by unpacking the SOA Systinet .ear and .war files, and **Next** to merge the SDM and UI configurations, generating all necessary schemas and repacking the .ear and .war files. Note that this takes some time.

7 Click **Finish** to end the process.

8 Restart the server.

7 User Interface Reference

Each Customization Editor view in the main and bottom-right section of the editor is described in the following sections:

- Artifact Editor on page 90. Manage your SOA artifacts and customize their properties, appearance and registry mapping.
- Property Editor on page 103. Manage your SOA properties and which perspectives can see and edit them.
- Property Group Editor on page 107. Organize your properties into groups.
- Navigation Editor on page 109. Customize the left-menu navigation links in SOA Systinet tabs.
- Portlets Editor on page 111. Customize which portlets appear in SOA Systinet tabs.
- Contextual Action Groups Editor on page 113. Organize your context actions into groups.
- Contextual Actions Editor on page 115. Manage the context actions available in the SOA Systinet UI.
- Navigation Actions Editor on page 116. Manage the navigation links available in SOA Systinet.
- Portlets Definitions Editor on page 118. Manage the portlets available in SOA Systinet.
- Perspectives Editor on page 117. Customize the perspectives available in SOA Systinet.
- Taxonomies Editor on page 119. Customize the taxonomies available in SOA Systinet.
- project.xml Editor on page 120. Manage your extension project.
- Messages View on page 123. View the action log as you customize your extension project.
- Search View on page 124. View the results of usage and entity searches.

Artifact Editor

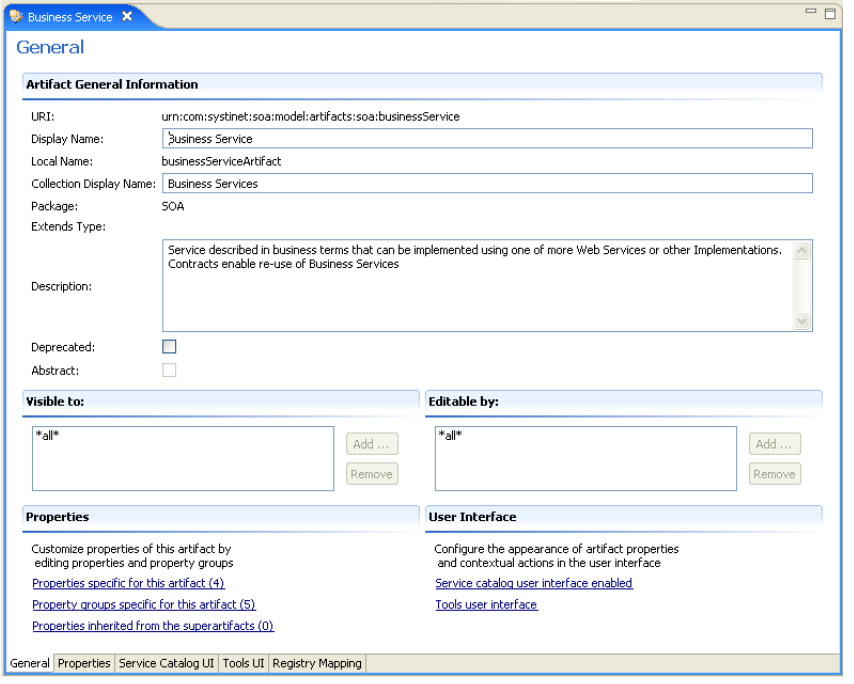
Artifacts are the basic building blocks of SOA and represent all types of entity. This editor allows you to modify the parameters, properties and appearance of an artifact type within SOA Systinet. Each artifact type and package has an editor with the artifact name as the title containing five tabs described in the following sections:

- **Artifact – General Tab on page 91.** The main attributes of the artifact type
- **Artifact – Properties Tab on page 93.** The properties of the artifact type
- **Artifact – Service Catalog UI Tab on page 95.** The format of the View Artifact page in the SOA Systinet UI
- **Artifact – Tools UI Tab on page 98.** The format of the View Artifact and Browse Artifact pages in the SOA Systinet UI
- **Artifact – Registry Mapping Tab on page 101.** The mapping of the artifact to registry entities

Artifact – General Tab

The **General** tab displays the general attributes of the artifact and allows you to modify some of them:

Figure 1. Business Service Editor – General Tab



The general tab contains five segments:

- **Artifact General Information**. There are eight parameters related to artifacts shown in this segment. They are described in the table below:

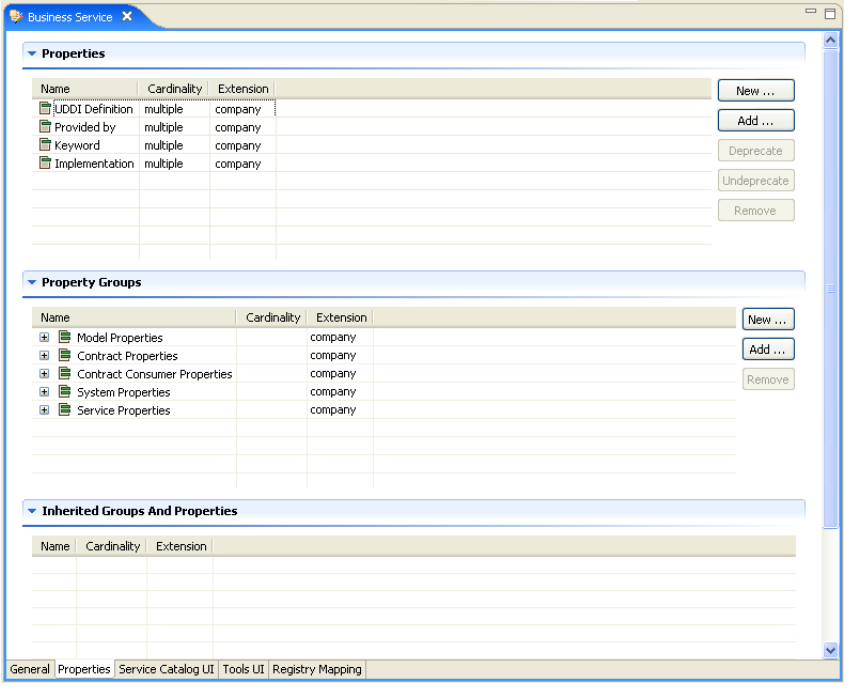
Parameter	Definition
URI	The identifier for the resource in the configuration
Display Name	The name of the artifact as it appears in the SOA Systinet UI
Local Name	The name of the artifact as it is stored in the extension
Collection Display Name	The plural version of the name as it appears in the SOA Systinet UI
Package	The parent artifact type that this artifact type belongs to
Extends Type	The artifact type that this artifact type inherits the properties of
Description	The description of the artifact type as it appears in the SOA Systinet UI
Deprecated	A checkbox indicating whether the artifact is currently active in the extension
Abstract	A checkbox indicating whether the artifact is an artifact package which does not have actual instances in the repository

- **Visible to**. A simple list of perspectives with **Add** and **Remove** functionality to select which perspectives can see this artifact type within SOA Systinet.
- **Editable by**. A simple list of perspectives with **Add** and **Remove** functionality to select which perspectives can amend this artifact type within SOA Systinet.
- **Properties**. A summary of the different properties that the artifact has. Each of the links opens the **Properties** tab described in Artifact – Properties Tab on page 93.
- **User Interface**. A pair of links to the **Service Catalog UI** and **Tools UI** tabs where the appearance of the artifact in the SOA Systinet UI can be amended.

Artifact – Properties Tab

The **Properties** tab displays all the properties of the artifact and enables you to add and remove them:

Figure 2. Business Service Editor – Properties Tab



This tab contains into three segments:

- **Properties**. This is the list of individual properties of the artifact. On the right are five buttons:
  - **New** opens the **New Property** dialog described in Creating a New Property on page 52.
  - **Add** adds a property to the artifact type from the list of available property descriptors, set its cardinality, and its location on the **View Artifact** page.
  - **Deprecate** deactivates the property in the artifact type.

- **Undeprecate** reactivates the property in the artifact type.
- **Remove** removes the selected property from the artifact type.

- **Property Groups**. This is the list of the property groups of the artifact. On the right are three buttons:
  - **New** opens the **New Property Group** dialog described in Creating a New Property Group on page 63
  - **Add** adds a property group to the artifact type from the list of available property groups.
  - **Remove** removes the selected property group from the artifact type.

- **Inherited Groups and Properties**. If the artifact is based on another artifact then this segment displays the inherited artifact and its properties and groups.

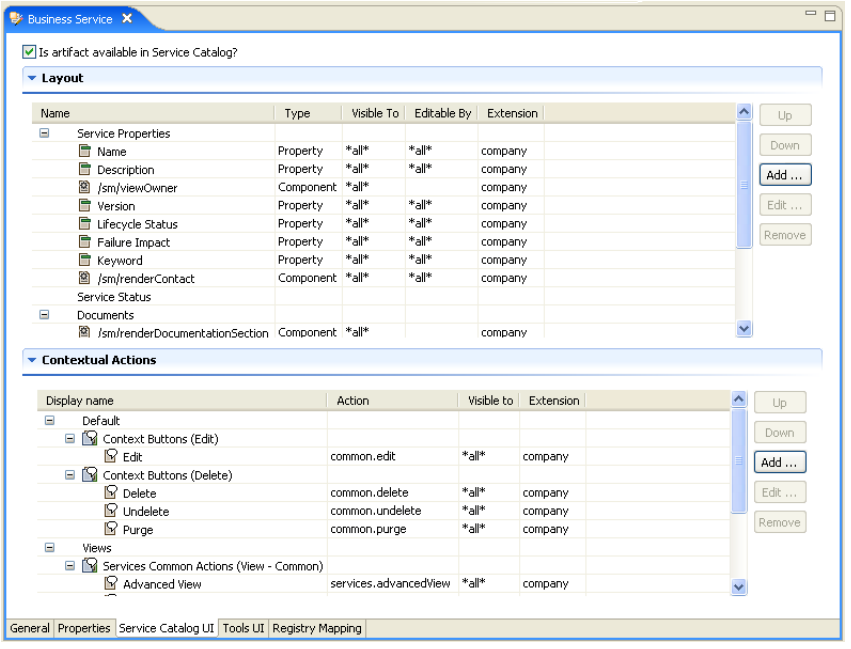
There are three parameters related to properties shown in these segments:

Parameter	Definition
Name	The name of the property as it appears in the SOA Systinet UI
Cardinality	The occurrence of the property in an artifact with options: • **Optional.** The property is not required to be populated • **Required.** The property must be populated • **Multiple.** The property can occur multiple times with different values
Extension	Which extension this property is part of

Artifact – Service Catalog UI Tab

The **Service Catalog UI** tab displays all the attributes of the artifact as they appear in the **Service View** page of the Service Catalog in SOA Systinet and allows them to be amended:

Figure 3. Business Service Editor – Service Catalog UI Tab



There is a checkbox to control whether the artifact is available within the Service Catalog and if this is checked there are two segments to control its appearance:

- **Layout**. This is the list of elements and properties of the artifact as they appear in the **Service View** page in the Service Catalog. The elements are organized into groups that match the sub-headings on the **Service View** page. On the right are five buttons:
  - **Up** moves the element up in the **Service View** page.
  - **Down** moves the element down in the **Service View** page.

- **Add** adds a property, component or layout group to the **Service View** page as described in Modifying the Layout of the View Artifact Page on page 41.
- **Edit** enables you to edit the name of a sub-heading group or the editable by and visible to attributes of a property.
- **Remove** removes the element from the **Service View** page.

There are five parameters related to page elements shown in this segment:

Parameter	Definition
Name	The name of the page element as in appears in the SOA Systinet UI
Type	The type of page element with options: • **Property** is a property of the artifact type • **Component** is a SOA Systinet UI component • **Relationship** is a relationship property of the artifact type
Visible to	The perspectives that can see this page element
Editable by	The perspectives that can edit this page element in SOA Systinet
Extension	Which extension this property is part of

- **Contextual Actions**. These are the options that appear in the context action menus at the top of the **Service View** page. There are five buttons on the right:
  - **Up** moves the action up in the list.
  - **Down** moves the action down in the list.
  - **Add** adds a new context action to this artifact as described in Modifying the Contextual Actions of an Artifact on page 44.
  - **Edit** enables you to edit the context action with the same parameters as **Add** functionality.
  - **Remove** removes the action from context action menus.

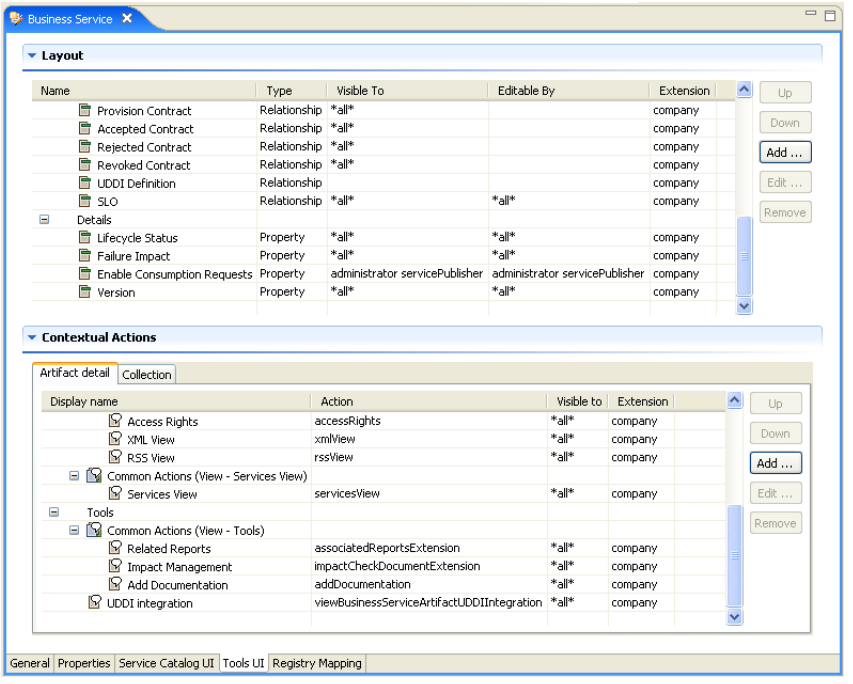
There are four parameters related to properties shown in this segment:

Parameter	Definition
Display Name	The name of the action as it appears in the SOA Systinet UI
Action	Contextual action identification in the extension
Visible to	The perspectives that can see this action
Extension	Which extension this property is part of

Artifact – Tools UI Tab

The **Tools UI** tab displays all the attributes of the artifact as they appear in the **View Artifact** and **Browse Artifact** pages in Tools in SOA Systinet and allows them to be amended:

Figure 4. Business Service Editor – Tools UI Tab



There are two segments to control its appearance:

- **Layout**. This is the list of elements and properties of the artifact as they appear in the View Artifact page in Tools. The elements are organized into groups that match the sub-headings on the View Artifact page. On the right are five buttons:
  - **Up** moves the element up in the **View Artifact** page.
  - **Down** moves the element down in the **View Artifact** page.

- **Add** adds a property, component or layout group to the **View Artifact** page as described in Modifying the Layout of the View Artifact Page on page 41.
- **Edit** enables you to edit the name of a sub-heading group or the editable by and visible to attributes of a property.
- **Remove** removes the element from the **View Artifact** page.

There are five parameters related to page elements shown in this segment:

Parameter	Definition
Name	The name of the page element as in appears in the SOA Systinet UI
Type	The type of page element with options: • **Property** is a property of the artifact type • **Component** is a SOA Systinet UI component • **Relationship** is a relationship property of the artifact type
Visible to	The perspectives that can see this page element
Editable by	The perspectives that can edit this page element in SOA Systinet
Extension	Which extension this page element is part of

- **Contextual Actions**. These are the options that appear in context actions at the top of artifact pages. In the **Tools UI** tab there are two tabs in this segment. **Artifact Detail** shows the actions for the **View Artifact** page and **Collection** shows the actions for the **Browse Artifact** page. There are five buttons on the right:
  - **Up** moves the action up in the list.
  - **Down** moves the action down in the list.
  - **Add** adds a new context action to this artifact as described in Modifying the Contextual Actions of an Artifact on page 44.

- **Edit** enables you to edit the context action with the same parameters as **Add** functionality.
- **Remove** removes the action from context action menus.

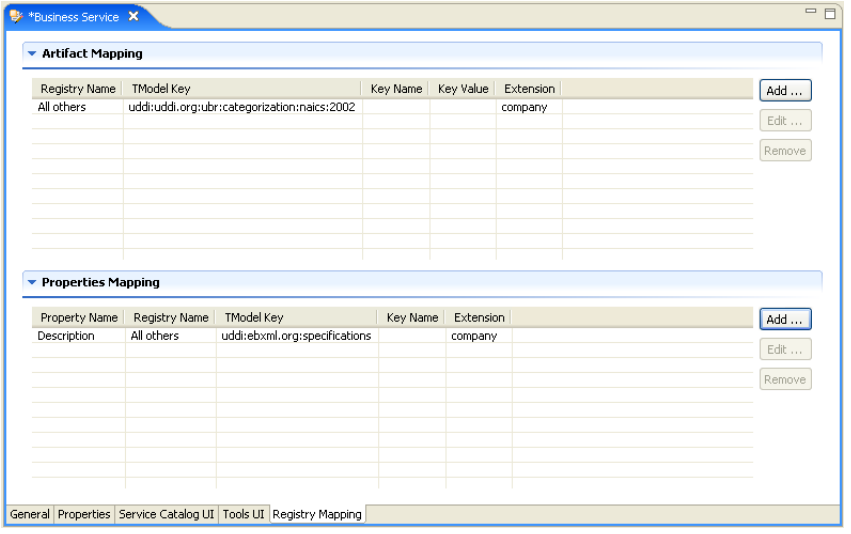
There are four parameters related to context actions shown in this segment.

Parameter	**Definition**
Display Name	The name of the action as it appears in the SOA Systinet UI
Action	Contextual action identification in the extension
Visible to	The perspectives that can see this action
Extension	Which extension this context action is part of

Artifact – Registry Mapping Tab

The **Registry Mapping** tab displays any mappings between the artifact and entities in registries and allows you to create, edit and remove them:

Figure 5. Business Service – Registry Mapping Tab



It is split into two segments:

- **Artifact Mapping**. This is the list of registry entities that represent the artifact in registries. On the right are three buttons:
  - **Add** adds a registry mapping as described in Mapping an Artifact Type to a Registry on page 47.
  - **Edit** edits the mapping as described in Mapping an Artifact Type to a Registry on page 47.
  - **Remove** removes the mapping from the artifact.

There are five parameters related to registry mappings shown in this segment:

Parameter	Definition
Registry Name	The registry that the artifact type is mapped to
TModel Key	The taxonomy key used to categorize the UDDI entity in the registry
Key Name	The name used to categorize the UDDI entity in the registry
Key Value	The value used to categorize the UDDI entity in the registry
Extension	Which extension this mapping is part of

- **Property Mappings**. This is the list of the properties of the artifact and if they are mapped to a registry. On the right are three buttons:
  - **Add** adds a new registry mapping for the selected property as described in Mapping an Artifact Type to a Registry on page 47.
  - **Edit** edits a property mapping as described in Mapping an Artifact Type to a Registry on page 47.
  - **Remove** removes a mapping from the selected property.

  There are five parameters related to properties shown in this segment:

Parameter	Definition
Property Name	The name of the property
Registry Name	The registry that the artifact type property is mapped to
TModel Key	The taxonomy key used to categorize the UDDI entity in the registry
Key Name	The name used to categorize the UDDI entity in the registry
Extension	Which extension this property is part of

Property Editor

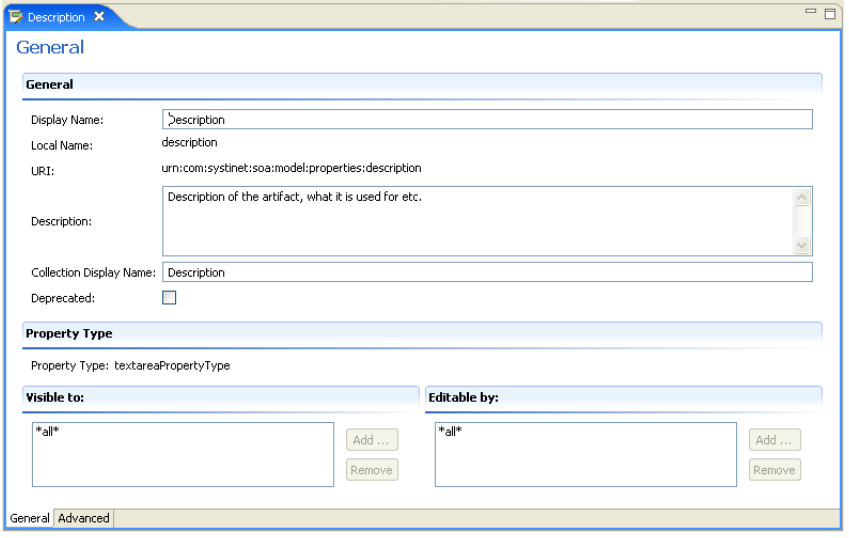
Properties are attributes of artifacts. The property editor allows you to modify the properties in your extension project. Each property has an editor with the property name as the title containing two tabs described in the following sections:

- **Property – General Tab on page 103.** The main attributes of the property
- **Property – Advanced Tab on page 105.** The advanced attributes of the property

Property – General Tab

The **General** tab displays the general attributes of the artifact and enables you to modify some of them:

Figure 6. Description Editor – General Tab



This tab contains four segments:

- **General**. There are seven parameters related to properties shown in this segment:

Parameter	Definition
Display Name	The name of the property as it appears in the SOA Systinet UI
Local Name	The name of the property as it is stored in the extension
URI	The identifier for the resource in the configuration
Description	The description of the property as it appears in the SOA Systinet UI
Collection Display Name	The plural version of the name as it appears in the SOA Systinet UI
Deprecated	A checkbox indicating whether the property is currently active in the extension

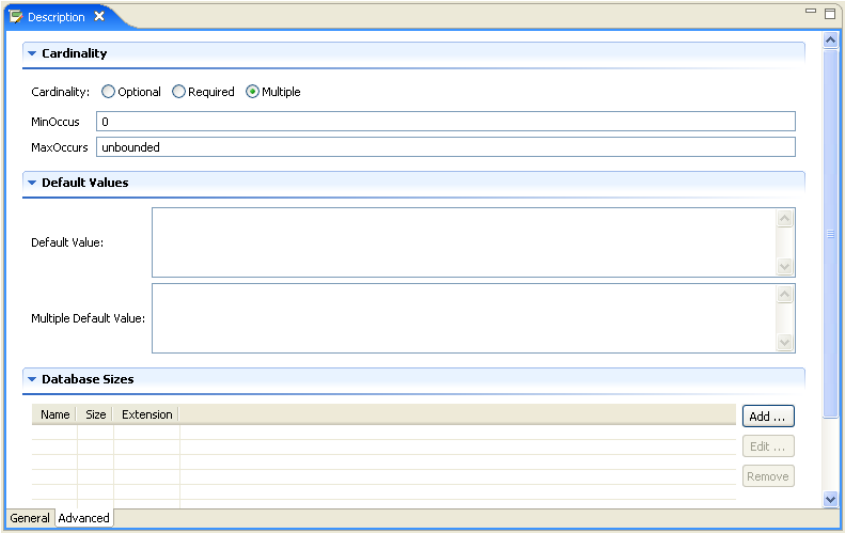
- **Property Type**, **Relationship**, or **Taxonomy**. There are three types of property and this segment is specific to each:
  - **Property Type**. The property type for primitive properties.
  - **Relationship**. This segment displays the source and target artifacts that this relationship links and some parameters of the inverse relationship. On the right are two sets of two buttons for altering the source and target artifacts:
    - **Add** selects an artifact in the extension to source or target.
    - **Remove** removes the relationship from a source or target artifact.
  - **Taxonomy**. The taxonomy that contains the available options for this property with **Browse** to select a new taxonomy from the extension project.

- **Visible to**. A list of perspectives with **Add** and **Remove** functionality to select which perspectives can see this property within SOA Systinet.
- **Editable by**. A simple list of perspectives with **Add** and **Remove** functionality to select which perspectives can amend this property within SOA Systinet.

Property – Advanced Tab

The **Advanced** tab displays the advanced attributes of the property and allows you to modify them:

Figure 7. Description Editor Advanced Tab



This tab contains three segments:

- **Cardinality**. There are three parameters related to property cardinality shown in this segment:

Parameter	Definition
Cardinality	The occurrence of the property in an artifact with options: • **Optional.** The property is not required to be populated • **Required.** The property must be populated • **Multiple.** The property can occur multiple times with different values
MinOccurs	If a property has multiple cardinality this parameter is the minimum occurrences of the property in an artifact
MaxOccurs	If a property has multiple cardinality this parameter is the maximum occurrences of the property in an artifact. Use `unbounded` if there is no limit.

- **Default Values**. There are two parameters related to properties shown in this segment:

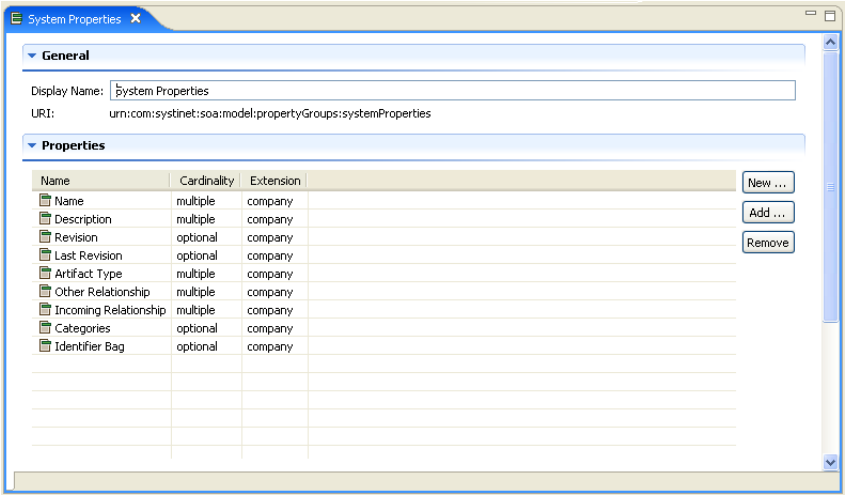
Parameter	Definition
Default Value	An XML extract defining the default value
Multiple Default Value	An XML extract defining default values in the case of multiple cardinality

- **Database Sizes** displays optional database sizing for property elements with **Add**, **Edit** and **Remove** functionality.

Property Group Editor

Properties can be organized into groups. The property group editor allows you to add and remove properties from a property group. Each property group has an editor with the property group name as the title:

Figure 8. System Properties Editor



The editor contains two collapsible segments:

- **General** enables you to change the **Display Name** and **URI** of the property group.
- **Properties** enables you to manage the property group.

  On the right are three buttons:

  - **New** creates a new property as described in Creating a New Property Group on page 63.
  - **Add** adds a property to the group from the list of available properties.
  - **Remove** removes the selected property from this property group.

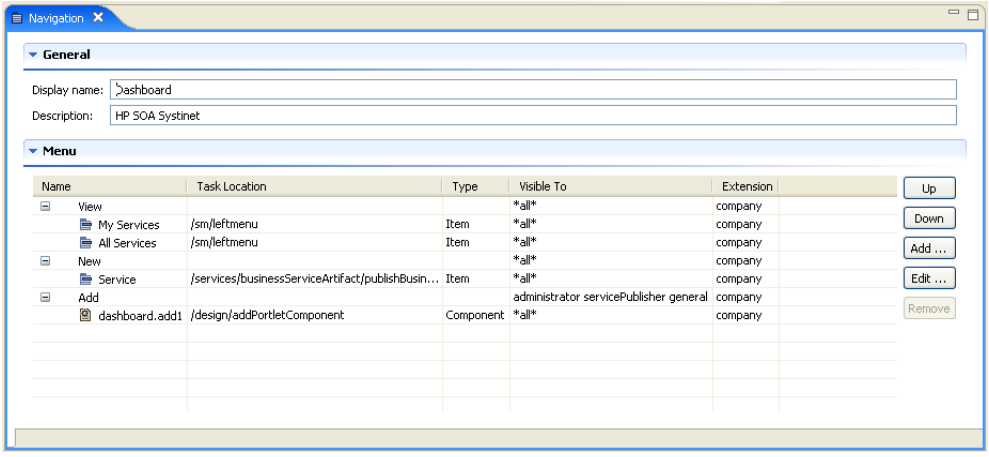
There are three parameters related to properties described in the table below:

Parameter	Definition
Name	The name of the property
Cardinality	The occurrence of the property in an artifact with options: • **Optional.** The property is not required to be populated • **Required.** The property must be populated • **Multiple.** The property can occur multiple times with different values
Extension	Which extension this property is part of

Navigation Editor

Navigation actions are the links between pages in SOA Systinet. The navigation editor allows you to configure the left menu and title of SOA Systinet tabs:

Figure 9. Dashboard Navigation Editor



The editor contains two collapsible segments:

- **General** enables you to change the **Display Name** and **Description** of the SOA Systinet tab.
- **Menu** enables you to configure the left menu of the SOA Systinet tab. The navigation items are arranged into headings and links.

  On the right are five buttons:

  - **Up** moves the selected item up in the menu.
  - **Down** moves the selected item down in the menu.
  - **Add** contains three options:

    - **Item** adds a navigation item to the menu as described in Adding Navigation Actions to a SOA Systinet Tab on page 69.
    - **Component** adds a component to the menu as described in Adding Components to a SOA Systinet Tab on page 71.
    - **Group** adds a new heading to the menu as described in Adding Navigation Groups to a SOA Systinet Tab on page 68.

- **Edit** opens one of three edit dialogs depending on the item selected:
    - **Item** edits a navigation item with the same parameters described in Adding Navigation Actions to a SOA Systinet Tab on page 69.
    - **Component** edits a component with the same parameters described in Adding Components to a SOA Systinet Tab on page 71.
    - **Group** edits a menu heading with the same parameters described in Adding Navigation Groups to a SOA Systinet Tab on page 68.

- **Remove** removes the selected navigation item from the SOA Systinet tab menu.

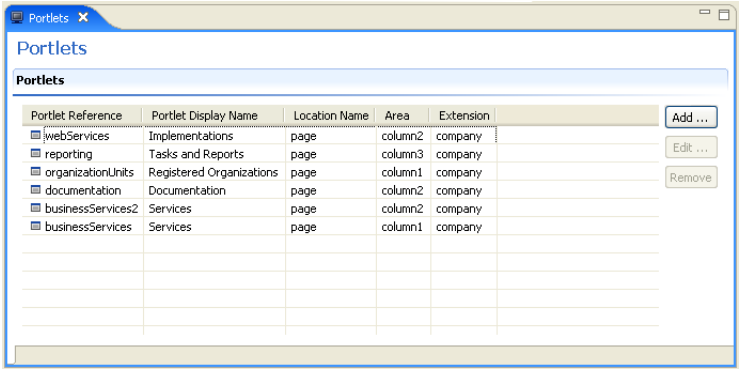
There are five parameters related to context actions in this segment:

Parameter	Definition
Name	The name of the navigation item as it is stored in the extension
Task Location	The identification of SOA Systinet UI task invoked by this menu item
Type	Item or Component
Visible to	Which perspectives can see this item
Extension	Which extension this navigation item is part of

Portlets Editor

There is a separate portlets editor for each tab within SOA Systinet. These allow you to control which portlets are available in each tab and where they appear.

Figure 10. Dashboard Portlets Editor



On the right are three buttons:

- **Add** opens the **New Portlet Placement** dialog described in Adding Portlets to a SOA Systinet Tab on page 66.
- **Edit** opens the **Edit Portlet Placement** dialog for the selected portlet with the same parameters described in Adding Portlets to a SOA Systinet Tab on page 66.
- **Remove** removes the selected portlet from the SOA Systinet tab.

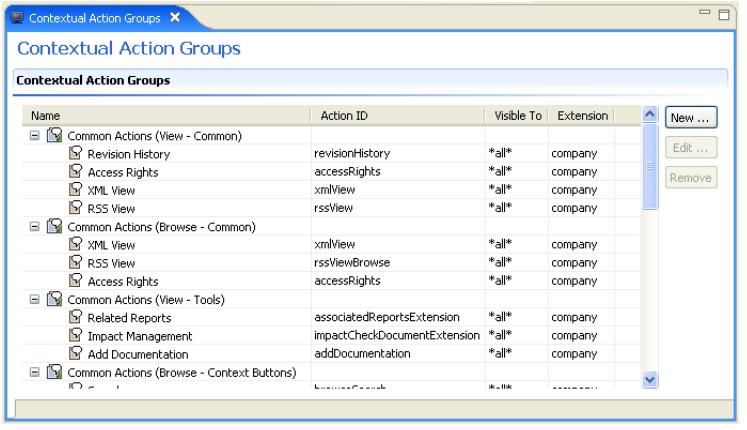
There are five parameters related to portlet placement:

Parameter	Definition
Portlet Reference	The identification of the portlet in the extension
Portlet Display Name	The name of the portlet as it appears on the SOA Systinet tab
Location Name	There are two options: • **page**. The portlet is open in the main area of the SOA Systinet tab • **menu**. The portlet is closed but available to add in the left menu
Area	If the portlet is open this specifies which column it appears in on the SOA Systinet tab
Extension	Which extension this portlet is part of

Contextual Action Groups Editor

Context actions can be grouped in order to add many actions to a UI element at once. The contextual action groups editor allows you to create, edit and remove context action groups from your extension project:

Figure 11. Contextual Action Groups Editor



On the right are three buttons:

- **Add** contains two options:
  - **Action Item** adds a context action to a group as described in Adding Context Actions to a Group on page 77.
  - **Group of Contextual Actions** adds a new context action group as described in Creating a New Context Action Group on page 76.
- **Edit** has two functions depending on which item in the editor is highlighted:
  - For a group you can edit the name.
  - For an item the **Edit Item** dialog is opened as described in Modifying a Contextual or Navigation Action on page 75.

- **Remove** deletes the selected context action item from your extension project.

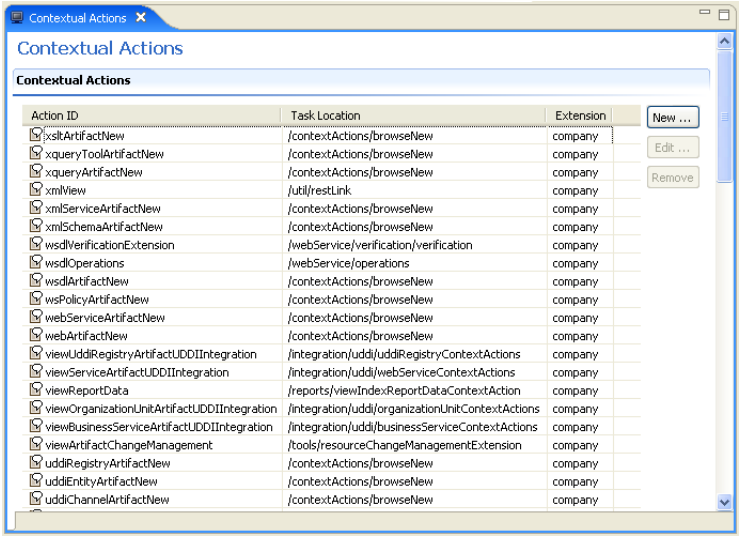
There are four parameters related to context actions:

Parameter	**Definition**
Name	The name of the action group as it is stored in the extension
Action	The reference to the contextual action in the extension
Visible to	Which perspectives can see this item
Extension	Which extension this perspective is part of

Contextual Actions Editor

Context actions are options available in the SOA Systinet UI for artifact and service pages. The contextual actions editor allows you to create, edit and remove context actions from your extension project:

Figure 12. Contextual Actions Editor



On the right are three buttons:

- **New** opens the **New Action** dialog described in Creating a New Contextual or Navigation Action on page 72.
- **Edit** opens the **Edit Action** dialog for the selected item as described in Modifying a Contextual or Navigation Action on page 75.
- **Remove** deletes the selected context action from your extension project.

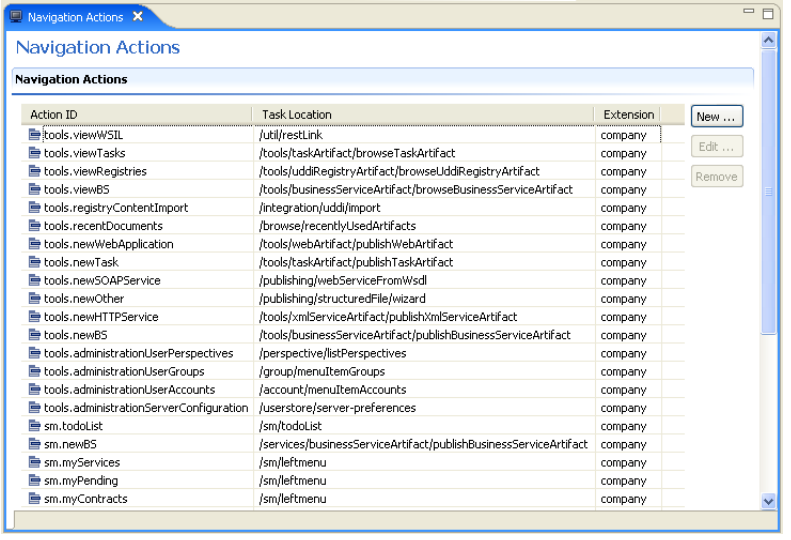
There are three parameters related to context actions:

Parameter	Definition
Name	The name of the context action as it is stored in the extension
Action	The reference to the contextual action in the extension
Extension	Which extension this perspective is part of

Navigation Actions Editor

Navigation actions are the links available in the menus of SOA Systinet tabs. The navigation actions editor allows you to create, edit and remove navigation actions from your extension project:

Figure 13. Navigation Actions Editor



On the right are three buttons:

- **New** opens the **New Action** dialog described in Creating a New Contextual or Navigation Action on page 72.

- **Edit** opens the **Edit Action** dialog for the selected item as described in Modifying a Contextual or Navigation Action on page 75.
- **Remove** deletes the selected navigation action from your extension project.

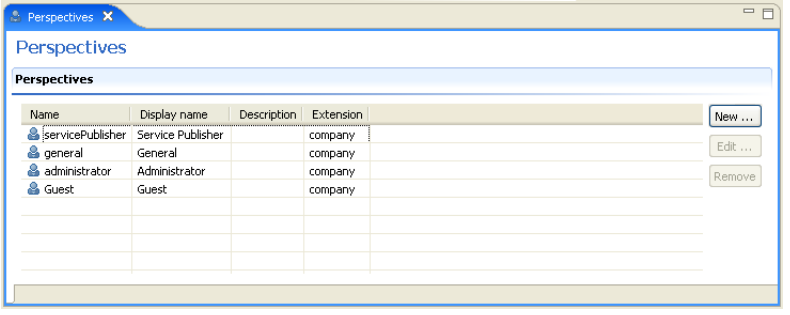
There are three parameters related to context actions described in the table below:

Parameter	Definition
Name	The name of the navigation action as it is stored in the extension
Task Location	The identification of SOA Systinet UI task invoked by this menu item
Extension	Which extension this perspective is part of

Perspectives Editor

Perspectives are the way SOA Systinet controls what users can view. The perspectives editor allows you to create, edit and remove perspectives from your extension project:

Figure 14. Perspectives Editor



On the right are three buttons:

- **New** opens the **New Perspective** dialog described in Creating a New Perspective on page 79.
- **Edit** opens the **Edit Perspective** dialog for the selected perspective with the same parameters described in Creating a New Perspective on page 79.

- **Remove** deletes the perspective from your extension project.

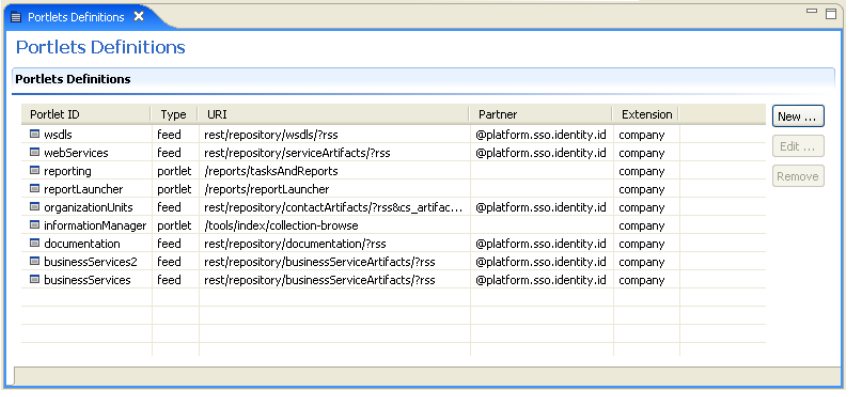
There are four parameters related to perspectives:

Parameter	Definition
Name	The name of the perspective as it is stored in the extension
Display Name	The name of the perspective as it appears in the SOA Systinet UI
Description	The description of the perspective as it appears in the SOA Systinet UI
Extension	Which extension this perspective is part of

Portlets Definitions Editor

Portlets are the components that appear in the main area of SOA Systinet tabs. The portlets definitions editor allows you to add, edit and remove portlet definitions from your extension project:

Figure 15. Portlets Definitions Editor



On the right are three buttons:

- **Add** contains two options:
  - **Feed** adds a new RSS feed portlet as described in Creating a New RSS Feed Portlet on page 81.

    - **Portlet** adds a new portlet as described in Creating a New Portlet on page 80.

- **Edit** opens the **Edit Feed** or **Edit Portlet** dialog for the selected item with the same parameters as **Add** functionality.
- **Remove** deletes the selected portlet from your extension project.

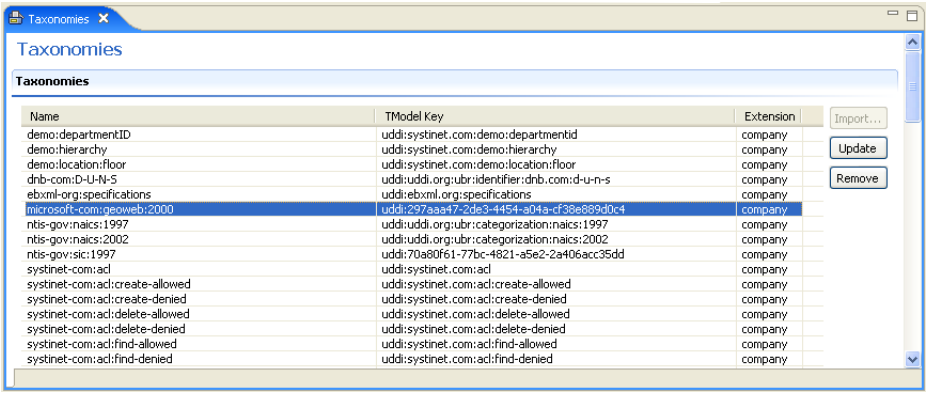
There are five parameters related to portlets described in the table below:

Parameter	Definition
Name	The name of the portlet as it is stored in the extension
Type	The type of portlet with options: • Feed • Portlet
URI	The identifier for the resource with portlet data
Partner	The SSO partner identification
Extension	Which extension this perspective is part of

Taxonomies Editor

Taxonomies are category groups that allow you to organize your services. The taxonomies editor allows the import and removal of taxonomies from your extension project:

Figure 16. Taxonomies Editor



On the right are two buttons:

- **Import** imports taxonomies from the active SOA Systinet server.
- **Update** refreshes the taxonomy list with any changes from the SOA Systinet server.
- **Remove** deletes the selected taxonomy from the extension project.

There are three parameters related to context actions described in the table below:

Parameter	Definition
Name	The name of the taxonomy as it is stored in the extension
TModel Key	The taxonomy key identifier
Extension	Which extension this taxonomy is part of

project.xml Editor

The project editor allows you to configure your extension project. It contains three tabs described in the following sections:

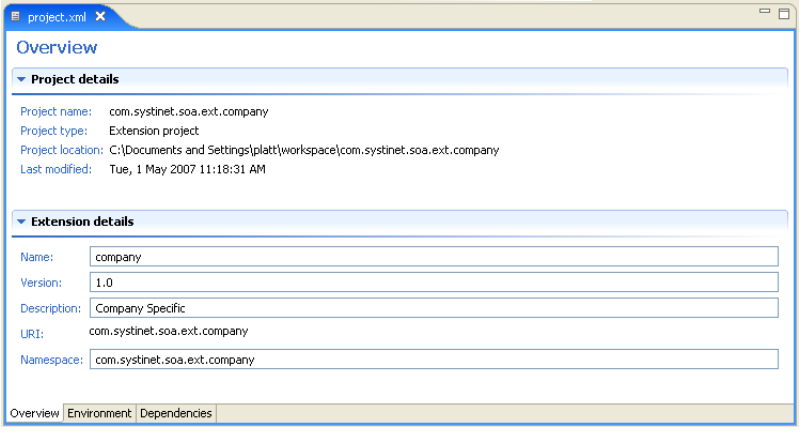
- Project – Overview Tab on page 121

- Project – Environment Tab on page 122
- Project – Dependencies Tab on page 123

Project – Overview Tab

The **Overview** tab enables you to view and amend the basic parameters of your extension project:

Figure 17. Project Overview Tab



The tab contains two collapsible segments:

- **Project details** displays parameters for the extension project:

Parameter	Definition
Project name	The name of the extension project
Project type	The project is an extension project
Project location	The workspace folder that contains the extension project
Last modified	The last time the project was changed

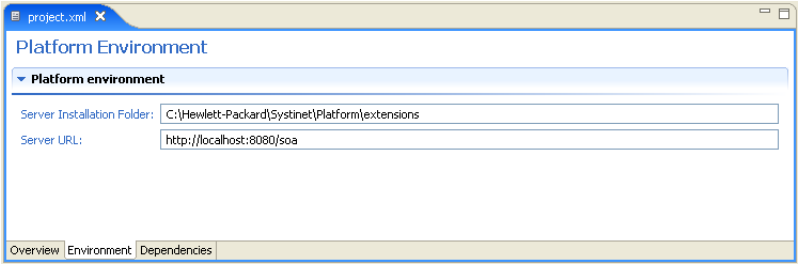
- **Extension details** enables you to configure some of the extension project parameters:

Parameter	Definition
Name	The display name of the extension
Version	The version number of the extension project
Description	A description of the extension project
URI	The identifier for the resource in the configuration (not editable)
Namespace	The prefix used for the URI when you create a new artifact type or property

Project – Environment Tab

The **Environment** tab enables you to change the parameters of the SOA Systinet server that the Customization Editor is configured for:

Figure 18. Project Environment Tab



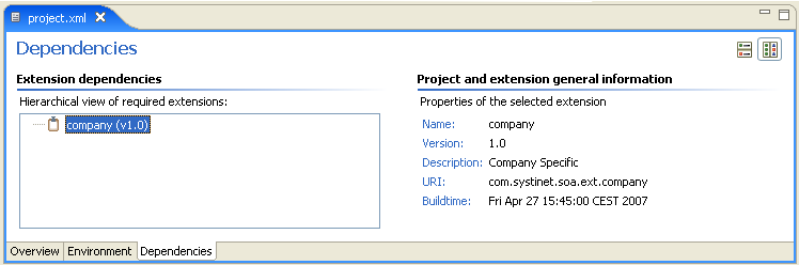
The tab contains the parameters:

Parameter	Definition
Server Installation Folder	The location of the extension folder in your SOA Systinet installation
Server URL	The URL used to access SOA Systinet

Project – Dependencies Tab

The **Dependencies** tab displays general information about your extension project and any dependencies that is has:

Figure 19. Project Dependencies Tab



The tab contains two segments:

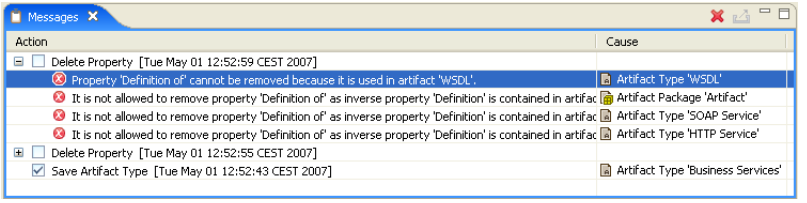
- **Extension dependencies** displays a tree of extensions that the extension project is dependent on.
- **Project and extension general information** displays parameters of the extension project:

Parameter	Definition
Name	The name of the extension
Version	The version number of the extension project
Description	A description of the extension project
URI	The identifier for the resource in the configuration (not editable)
Buildtime	The creation date and time of the extension

Messages View

The **Messages** view tracks the changes that you make to extension entities and displays any warnings and problems that may occur as a result of those actions:

Figure 20. Messages View

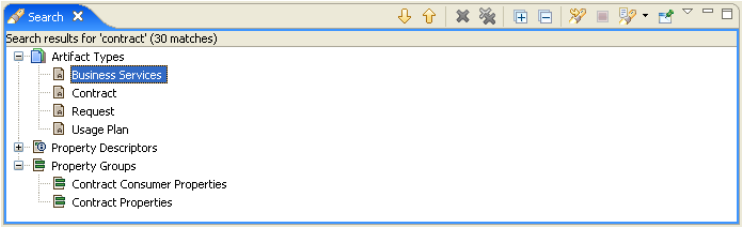


Double-clicking an item in the tree opens the relevant editor for that object.

Search View

The **Search** view displays the results of a search (see Searching the Extension on page 30) or find usage query (see SDM Details on page 27):

Figure 21. Search View



The results are shown as a tree of artifact types, properties and property groups containing the requested item.

Double-clicking an artifact type, property or group opens the relevant editor.

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