Catalog

Contents

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Chapter

1

Overview

Topics:

-

Access the Catalog Page

Procedure

In the **Applications** menu, navigate to the **TOOLS** section, and then select **Catalog**.
The **Catalog** page appears.

Note: If this is the first time that you have accessed the **Catalog** page, your Personal folder is selected by default. Otherwise, the last folder that you viewed is selected.

Chapter
2

About Catalog Folders

Topics:

About Catalog Folders

In the Catalog, items are grouped into the following default folders:

- Personal
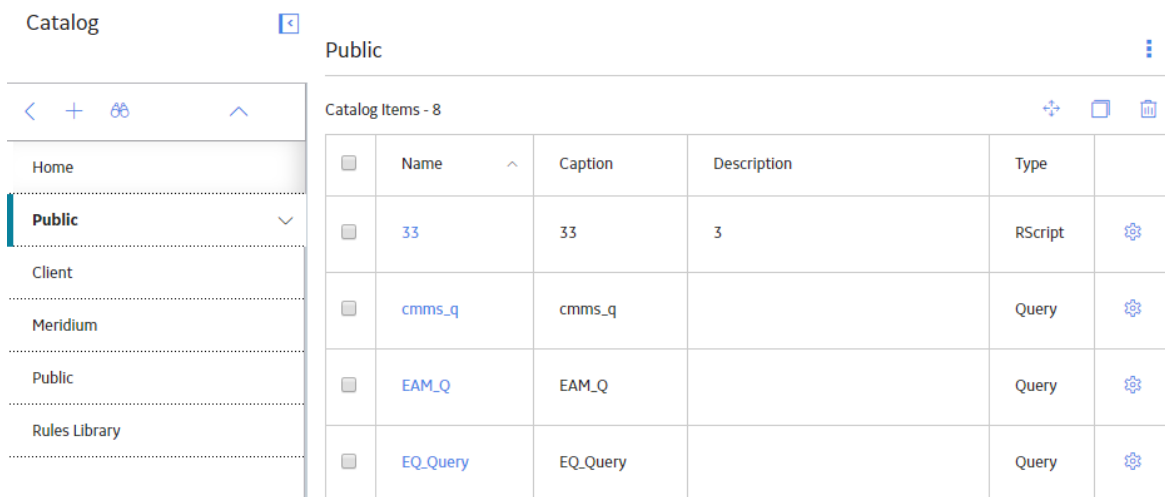- Public
- Baseline

Personal Folder

Each Security User has a Personal folder, which can be viewed by that user, Super Users, members of the MI Catalog Administrator Security Group, and members of the MI Power User Role Security Group. By default, each Personal folder contains the following subfolders:

- Datasets
- Charts
- Queries
- Reports
- Searches

When you access the Catalog, you will see at least your Personal folder. If you have been granted View permissions to other folders, those folders will also be displayed in the folder hierarchy.

Public Folder

The Catalog contains a Public folder, which contains items that can be shared with multiple users. If you are a Super User, a member of the MI Catalog Administrator Security Group, a member of the MI Power User Role Security Group, or a non-Super User who has been given explicit permissions to the Public folder, you will see the Public folder and its subfolders. If you do not have explicit permissions to access the Public folder, it will be unavailable when you access the Catalog. If you have been granted explicit permissions to access the Public folder, you will be able to select and expand it to view one or more of the folders and items that are stored within it, as shown in the following image.

Only the subfolders that you have been granted permission to access will be enabled. All other folders will be disabled.

Note that the Public folder contains a Rules Library folder. Only administrative users should be allowed to view this folder in the Catalog. Be sure to set up the Catalog folder permissions to restrict access to the Rules Library folder as appropriate.

Baseline Folder

The Catalog contains a Baseline folder, which can be viewed by Super Users, members of the MI Catalog Administrator Security Group, and members of the MI Power User Role Security Group. The Baseline folder contains the baseline Catalog items that are provided by APM. In other words, baseline items are those that will exist in your system before any customization has been performed. In some cases, the baseline items must be modified before they can be used effectively within your system. In other cases, you can simply use the Catalog item as it is delivered without modifying it at all.

Note: The Rules Library folder exists in the Public folder but not the Baseline folder. The Baseline folder is visible only to Super Users, members of the MI Catalog Administrator Security Group, and members of the MI Power User Role Security Group.

When new baseline items are added to the Catalog as part of a first-time installation, an upgrade, or the addition of an add-on package, the items are added in two places: a subfolder within the Baseline folder and a corresponding subfolder in the Public folder. Wherever APM rules reference the Catalog item, the rules reference the copy in the Public folder.

This means that if you need to customize any of the baseline content, you will need to modify the item in the Public folder. Items in a Baseline folder can be copied to Personal or Public folders and modified there, but cannot be modified within the Baseline folder itself. If you want to restore the original baseline functionality, you can copy the item from the Baseline folder and paste it into the Public folder.

When you upgrade to a new version of APM, new baseline Catalog items will be delivered to the Baseline and Public folders. If the new version of APM includes baseline Catalog items that have been modified by APM, the items in the Baseline folder will be overwritten with the modified content. If you have customized the corresponding item in the Public folder, APM rule logic will not modify the Public folder item. To use the new baseline functionality, you will need to manually copy the updated item from the Baseline folder to the Public folder.

Note: If you have customized an item in the Public folder and the item is removed from the Baseline folder during an upgrade, if your customized item has the same name as the Baseline item, it will also be removed from the Public folder. This means that if you want to retain changes to customized content that APM has removed in a newer version, before you upgrade to that version, you should export the item so that you can import it after the upgrade is complete.

For example, assume that you have customized the Enterprise Analysis List query in the Catalog folder `\\Public\Meridium\Modules\RCM`, and that you are upgrading to a new version of APM that provides an updated version of the baseline Enterprise Analysis List query. When you upgrade, the old baseline Enterprise Analysis List query in the Catalog folder `\\Baseline\Meridium\Modules\RCM` will be overwritten with the updated Enterprise Analysis List query. Your customized query in the Catalog folder `\\Public\Meridium\Modules\RCM` will, however, not be updated.

Note: A deletion is interpreted by APM rule logic as a form of customization. This means that, if you delete a Catalog item from the Public folder, that item will not be added back to the Public folder by an upgrade.

Create a New Catalog Folder

About This Task

Your permissions determine your ability to create new folders. With the lowest level of permissions, you can create a folder only in your Personal folder. With the appropriate permissions and user status (e.g., Super User), you can also create new folders in other Personal folders and in the Public folder.

Note: No user can create folders in the Baseline folder.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select ╋.

   The **New Folder** window appears.
3. Enter a name and description, and then select **Done**.

   Note: Catalog folder names must be unique. Additionally, Catalog folder names are case insensitive. For example, if a subfolder named My Queries existed within your Personal folder, you would not be able to make a new subfolder within your Personal folder named MY QUERIES.

   The new folder is created and appears in the folder hierarchy.

Modify Catalog Properties

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder whose permissions that you want to modify.

   The workspace for the selected folder appears.
3. In the workspace heading, select ⸭ , and then select **Folder properties**.

   The **Catalog Folder Properties** window appears, displaying the properties for the selected Catalog folder.
4. As needed, modify the Catalog properties, and then select Done.

   The modifications to the Catalog properties are saved.

Copy an Existing Catalog Folder

About This Task

You can copy a folder and its contents and paste it within another folder.

Note: Subfolders can be copied and pasted only within the same Personal or Public folder. Folders cannot be copied and pasted between Personal and Public folders. Baseline folders cannot be copied, but items within Baseline folders can be copied.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder that you want to copy.

   The workspace for the selected folder appears.

3. In the workspace heading, select ⁝ , and then select **Copy folder**.

   The **Catalog Folder Browser** window appears.

4. In the folder hierarchy, select the folder to which you want to copy the folder, and then select **Done**.

   Note: Folder names must be unique within the root folder. To copy a folder with the same name of one that already exists in the destination folder, you must first rename one of the folders.

   The Catalog folder is copied to the selected folder.

Move a Catalog Folder

About This Task

You can reorganize folders in the Catalog as needed. When you move a folder, all its subfolders will also be moved.

Note: You cannot move a folder to a Baseline folder.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder that you want to move.

   The workspace for the selected folder appears.

3. In the workspace heading, select ⁝ , and then select **Move folder**.

   The **Catalog Folder Browser** window appears.

4. In the folder hierarchy, select the folder to which you want to move the folder, and then select **Done**.

   The folder is moved to the specified location in the Catalog.

Delete a Catalog Folder

About This Task

Deleting a Catalog folder will also delete its subfolders and the contents of those subfolders.

Note: You can delete only Personal and Public folders. You cannot delete Baseline folders.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder that you want to delete.

   The workspace for the selected folder appears.

3. In the upper-right corner of the workspace, select ⁝ , and then select **Delete folder**.
4. On the confirmation dialog box that appears, select **OK**.

The Catalog folder and its contents are deleted from the database.

Modify Public Folder Permissions

About This Task

Only Super Users, members of the MI Catalog Administrator Security Group, and members of the MI Power User Role Security Group can modify Public folder permissions.

Note: No user can modify permissions to Personal or Baseline folders.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder whose permissions you want to modify.

   The workspace for the selected folder appears.

3. In the workspace heading, select ⁝ , and then select **Folder properties**.

   The **Catalog Folder Properties** window appears, displaying the properties for the selected Catalog folder.

4. Select **Permissions**.
   The **Permissions** section of the **Catalog Folder Properties** window appears, displaying a grid that contains users and groups that have permissions to create, view, edit, or delete items within the selected folder.

5. As needed, modify the available options, and then select **Done**.
   The permissions to the selected folder are modified.

   Note: If you select the **Spread** check box for any permissions to a given folder, those permissions are spread to its subfolders. When you view the **Folder properties** window for a subfolder of the selected folder, however, the name of the user or group whose permissions were spread will not appear in the list.

Add a User with Permissions

About This Task

The following instructions can be used to grant existing users permissions to a Public folder in the Catalog.

Note: No user can modify permissions to the Personal or Baseline folder.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder whose permissions you want to modify.

   The workspace for the selected folder appears.

3. In the workspace heading, select ⁝ , and then select **Folder properties**.

   The **Catalog Folder Properties** window appears, displaying the properties for the selected Catalog folder.

4. Select **Permissions**.

The **Permissions** section of the **Catalog Folder Properties** window appears, displaying a grid that contains users and groups that have permissions to create, view, edit, or delete items within the selected folder.

5. In the upper-right corner of the window, select .

   The **User Browser** window appears.
6. Select a user from the list, and then select **Done**.
   The selected user appears in the grid in the **Permissions** section of the **Catalog Folder Properties** window.
7. As needed, modify the available options to determine the permissions for the user.
8. Select **Done**.
   The selected user is granted permissions to the folder.

Add a Group with Permissions

About This Task

The following instructions can be used to grant existing groups permissions to a Public folder in the Catalog.

Note: No user can modify permissions to the Personal or Baseline folder.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder whose permissions you want to modify.

   The workspace for the selected folder appears.
3. In the workspace heading, select , and then select **Folder properties**.

   The **Catalog Folder Properties** window appears, displaying the properties for the selected Catalog folder.
4. Select **Permissions**.
   The **Permissions** section of the **Catalog Folder Properties** window appears, displaying a grid that contains users and groups that have permissions to create, view, edit, or delete items within the selected folder.
5. In the upper-right corner of the window, select .

   The **Group Browser** window appears.
6. Select a group from the list, and then select **Done**.
   The selected group appears in the grid in the **Permissions** section of the **Catalog Folder Properties** window.
7. As needed, modify the available options to determine the permissions for the group.
8. Select **Done**.
   The selected group is granted permissions to the folder.

Revoke Access to a Public Folder

About This Task

The following instructions can be used to remove Security User or Security Group permissions to a Public folder in the Catalog.

Note: You can remove permissions to a Public folder for a Security User or Security Group only if you are a Super User, a member of the MI Catalog Administrator Security Group, or a member of the MI Power User Role Security Group.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder whose permissions you want to modify.

    The workspace for the selected folder appears.

3. In the workspace heading, select ⦂ , and then select **Folder properties**.

    The **Catalog Folder Properties** window appears, displaying the properties for the selected Catalog folder.

4. Select **Permissions**.
    The **Permissions** section of the **Catalog Folder Properties** window appears, displaying a grid that contains users and groups that have permissions to create, view, edit, or delete items within the selected folder.

5. In the row for the user or group whose permissions you want to modify, select 🗑.

6. Select **Done**.
    The permissions to the selected folder and its subfolders are removed for the selected user or group.

Chapter

3

About Catalog Items

Topics:

About Catalog Items

The following topics describe procedures related to catalog items.

Access a Catalog Item

About This Task

You can use the following instructions to open Catalog items from a given folder in the folder hierarchy.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder containing the item that you want to open.
   The corresponding Catalog items appear in the grid within the workspace for the selected folder.
3. For the item that you want to access, select the link in the **Name** column.

   The selected item appears on a new page.

Copy a Catalog Item

Before You Begin

You can copy any item in the Catalog to another folder in the Catalog. Within a Catalog folder, all the item names must be unique. If you want to copy to one Catalog folder an item with the same name as an item that already exists in that folder, you will need to rename the item.

Note: You can copy an item from a Baseline folder and paste it into a Personal or Public folder, but you cannot paste an item into a Baseline folder. In addition, the Rules Library folder is meant for viewing purposes only and you should not copy items to or from it.

About This Task

You can use the following instructions to copy an existing Catalog item to another Catalog folder.

Note: Only users with Create permissions for a folder can paste items into that folder.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder containing the item that you want to copy.
   The corresponding Catalog items appear in the grid within the workspace for the selected folder.
3. In the row for the item that you want to copy, select the check box.
4. Above the grid, select .

   The **Catalog Folder Browser** window appears.
5. In the folder hierarchy, select the folder into which you want to paste the Catalog item, and then select **Done**.

   The Catalog item is copied to the selected folder.

Move a Catalog Item

About This Task

You can use the following instructions to delete a Catalog item from one location and paste it into an existing folder elsewhere in the Catalog.

Note: You cannot move an item to a Baseline folder.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder containing the item that you want to move.
   The corresponding Catalog items appear in the grid within the workspace for the selected folder.
3. In the row for the item that you want to copy, select the check box.
4. Above the grid, select .

   The **Catalog Folder Browser** window appears.
5. In the folder hierarchy, select the folder to which you want to move the Catalog item, and then select **Done**.

   The Catalog item is moved to the selected location.

Delete a Catalog Item

Before You Begin

When you delete a Catalog item, note that:

- You cannot delete an item in a Baseline folder.
- You cannot delete an item that is being used by another item. This means, for example, that if a graph is based on a query, you can delete that query only if you first delete the graph. Similarly, if a report is associated with a specific family, before you can delete the report, you must first remove the link between the report and the family.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder containing the item that you want to delete.
   The corresponding Catalog items appear in the grid within the workspace for the selected folder.
3. In the row for the item that you want to delete, select the check box.
4. Above the grid, select .

   A dialog box appears, asking you to confirm that you want to delete the item.
5. Select **OK**.

   The Catalog item is deleted from the database.

Modify Catalog Item Properties

About This Task

To modify Catalog item properties, you must have View and Edit permissions to the folder.

Note: If you transfer ownership of a Catalog item to another user, but the item resides within a folder to which that user does not have View permissions, the user will not be able to view the Catalog item.

Procedure

1. Access the **Catalog** page.
2. In the left pane, select the folder containing the item whose properties you want to modify.
   The corresponding Catalog items appear in the grid within the workspace for the selected folder.
3. In the row for the item whose properties you want to modify, select the check box.
4. In the same row, select ⚙.

   The **Catalog Item Properties** window appears, displaying the properties for the selected Catalog item.
5. As needed, modify the properties, and then select **Done**.

   The properties for the selected item are modified.

Search for a Catalog Item

Procedure

1. Access the **Catalog** page.
2. In the workspace heading, select ⠿, and then select **Search folder**.

   The **Catalog Search** window appears.
3. In the **Search for items named** box, enter a search term.

   The results include items that contain the search term anywhere in their names. For example, searching for the term heat will return results like Heat Exchanger query and Heating Range Values query. This field does not search Catalog item captions.

4. To select a folder within which you want to perform your search, select [⋯], then select a folder in the **Catalog Folder Browser** window, and then select **Done**.

   The selected folder path appears in the **In folder(s)** box.

   Tip: Subfolders will be searched by default. To search in one folder only, on the **Catalog Folder Browser** window, clear the **Include subfolders** check box.
5. To search for a specific type of Catalog item, specify the type in the **Of type** box.
6. Select **Search**.

   The results appear at the bottom of the **Catalog Search** window.
7. To open an item from the results, select the row for the item, and then select **Open**.

   The selected item appears in a new tab.

Chapter

4

Reference

Topics:

About Catalog Folder Properties

Only Super Users and members of the MI Catalog Administrator Security Group can view and modify folder properties. Each Catalog folder has the following properties, which are displayed on the **Catalog Folder Properties** window, in the **General** section:

- **Name** : The name of the folder.
- **Description** : A brief description of the folder.

  Note: You cannot modify the name and description of root-level folders (i.e., Personal, Public, and Baseline).
- **Last Updated By** : The name of the user who last modified the folder.
- **Last Updated On** : The date the folder was last modified.

About Catalog Items

Catalog items are objects that are stored in the APM database. APM supports the following Catalog item types:

- Dashboard
- DataLoaderTemplate
- Dataset
- Graph
- Metric Views
- Projects
- Queries
- Report
- RScript

  Rule Projects

  Note: Only administrator users can see Rule Projects.
- Script
- Search

When you select a folder in the Catalog folder hierarchy, the Catalog items that are stored in that folder appear in the grid within the workspace.

Each Catalog item has the following properties:

- **Name** : The name of the item. Catalog item names are required, must be unique within a given folder. Catalog item names should not contain the following characters:

  ◦ % (percent sign) followed by two hexadecimal digits (0-9, a-f)
  ◦ [] (square brackets)

    Note: This rule applies to queries only.

  If you create a Catalog item that contains any of these characters and then create a hyperlink to that item, an error message will appear when you try to open the item using the link.
- **Caption** : The translatable value that is used to identify the Catalog item in most places throughout APM. If a translation exists for the Culture associated with your Security User account, you will see that translation when you view the item in the Catalog.
- **Description** : A brief description of the item.

- **Type** : The item type.
- **Last Update By** : The name of the user who last modified the item.
- **Last Update Date** : The date the item was last modified.
- **Created By** : The name of the user who created the item.
- **Created Date** : The date on which the item was created.
- **Owner** : The name of the user who first saved the item.

Chapter

5

Release Notes

Topics:

First Quarter of 2023

Release Date: March 31, 2023

This topic provides a list of product changes released for this module on this date.

Table 1: Resolved Issues

The following issues, which existed in one or more previous versions, have been resolved.

Description	Tracking ID
Previously, you were able to create a catalog folder with leading or trailing spaces. This issue has been resolved. Now, you will receive a message to remove the leading or trailing spaces before you are allowed to save the catalog.	DE196838

Fourth Quarter of 2022

Release Date: December 13, 2022

This topic provides a list of product changes released for this module on this date.

Table 2: Enhancements and New Features

The following enhancements and new features have been added.

Description	Tracking ID
To improve usability, you can now include leading and trailing spaces in a Catalog folder name.	US529221

Table 3: Resolved Issues

The following issues, which existed in one or more previous versions, have been resolved.

Description	Tracking ID
Previously, when you selected your personal folder in the Catalog, the workspace displayed "Personal" instead of your name. This issue has been resolved.	DE170888

Second Quarter of 2020

Release Date: May 8, 2020

This topic provides a list of product changes released for this module on this date.

Table 4: Resolved Issues

The following issues, which existed in one or more previous versions, have been resolved.

Description	Tracking ID
Previously, when you attempted to create or modify a Catalog Item, the Name and Caption fields in the Save As window could contain a maximum of 100 characters. Now, the field size has been increased to 255 characters.	DE50672
Previously, in the **Catalog Item Properties** window for a Catalog item, when you modified a value, the updated value did not appear for the corresponding tool. This issue has been resolved.	DE50673

Third Quarter of 2019

Catalog

This topic provides a list of product changes released for this module on the dates listed below.

Release Date: September 27, 2019

Table 5: Enhancements and New Features

The following enhancements and new features have been added.

Description	Tracking ID
If you log in to APM as a Super User, you can now perform the following operations in the **Catalog** page: • Copy or move a Catalog folder or Catalog item between Personal folders. • Copy or move a Catalog folder or Catalog item between Public folders. • Copy or move a Catalog item between Personal and Public folders. However, you cannot copy or move a Catalog folder between Personal and Public folders.	US201765

Table 6: Resolved Issues

The following issues that existed in one or more previous versions have been resolved.

Description	Tracking ID
Previously, after you renamed a folder within the Public folder using the **Catalog Folder Properties** window, if you attempted to rename the folder consecutively, an error message appeared. This issue has been resolved.	DE50686

Second Quarter of 2019

Catalog

This topic provides a list of product changes released for this module on the dates listed below.

Release Date: April 18, 2019

Table 7: Resolved Issues

The following issues that existed in one or more previous versions have been resolved.

Description	Tracking ID
Previously, after you upgraded an Oracle data source, certain custom folders did not appear in the catalog under **Public > Meridium**. This issue has been resolved.	DE106796