IDERA

ER/Studio Team Server
Evaluation Guide

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Contents

Introduction

IDERA ER/Studio Team Server is a model and metadata collaboration platform that provides greater meaning, understanding and context to enterprise data. Database professionals, developers, and business analysts gain better comprehension and compliance using integrated model, metadata & collaboration tools. Team Server's collaborative enterprise glossary brings together the entire organization to foster improved metadata, business definitions, governance, compliance, and security policies. Online models showcase data relationships, while powerful search capabilities help users locate enterprise data with ease. Integration with IDERA's database management tools, including Performance IQ licenses for Team Server, extends the reach of enterprise metadata with interactive "on-the-fly" tool-tips containing glossary definitions, policy information and associated metadata in the client tools.

Product benefits by audience

|	
Data Consumers	• Integrate effective data comprehension capabilities in to daily workflows, delivering context and meaning to every user. • Enable collaboration around data among teams across business units or business functions. • Support corporate compliance initiatives by driving responsible use of sensitive or private data
Data Modeling Professionals	• Integrate the glossary's business definitions with internal web assets to provide on-the-fly business context with tool-tips and pop-ups. • Create a single registry of all available data sources. • Adhere to industry regulations and business standards regarding security and privacy, by alerting users who view or modify sensitive data within the tools.
Data Management Professionals & Developers	• Develop applications faster by using business terms to easily locate data elements. • Monitor access to and use of business glossaries and associated functions, to understand immediate data management requirements. • View in-line metadata in DBArtisan & Rapid SQL. • Monitoring capability with Performance IQ Team Server.

About this guide

This guide helps you get started using IDERA Team Server as part of the ER/Studio product family.

The design of the guide is to enable you to, read through and see the exciting features that Team Server delivers, or if you have a demo environment set up, you can follow our evaluation step-by-step sections. These sections are highlighted with the 'mouse' icon and allow you to get first-hand experience at the exciting new features.

Should you wish to experience some of the more advanced features in the evaluation, you will be required to configure your installation so that these features can be demonstrated. These sections are highlighted with the 'configuration/tools' icon.
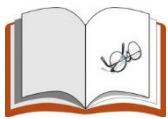
The reading sections enable you to walk you through some more complicated features and give an overview for you to read through only. These are highlighted by the 'reading' icon.

To complete this guide fully, you will need to have latest versions of DBArtisan or Rapid SQL and Team Server installed. For more information, an up-to-date installation guide is available online. Please see https://www.idera.com/support/productdocuments for details.

You will need additional files for this evaluation, they can be found under Evaluation Resources on the main page of the Team Server wiki (http://docwiki.embarcadero.com/TeamServer/ERStudio/193/en/Main_Page).

The tutorials are divided into 14 sessions in three parts, do them all at once or complete them individually as your time permits. You can use this basic tutorial as a road map of some product highlights, but also to help you find your own path in exploring Team Server.

Part 1 - The basics

- Getting Started with IDERA Team Server
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- Create a new glossary
- Import glossaries and terms
- Searching for terms - A usage example
- Filtering search terms

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- Setting up for further evaluation
- ER/Studio Data Architect configuration
- ER/Studio Team Server configuration
- ER objects - Viewing alerts
- DB Team Server and DB PowerStudio product integration

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- ER/Studio Team Server - More features
- People
- Glossary tooltips

Getting started with IDERA Team Server

When you first log in to Team Server, you are presented with the Welcome page.

NOTE: The default login being Username =Admin > Password =Admin.

The graphic below names and describes the functionality of some key elements of the Team Server user interface.

Home page displays the social interface, showing recent activity and team communication.

Items that you have followed are listed here to give you easy one-click access. As are users who have followed you.

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ER/Studio Team Server glossaries and terms

Now that you have logged in, you can start to explore the rich features of Team Server.

Your Home Page includes Streams to keep you informed of any modifications or activity with, for example, ER Objects, Glossaries or Terms that you have an interest in. These are especially useful to keep in touch with any discussions.

The top navigation menu allows you to navigate through the features available. The left menu bar gives further features related to the current top menu item.

Create a new glossary

1. To create a new Glossary, on the top ribbon, click **Glossaries**.
2. On the top right of the window, click the **New Glossary** button to open the New Glossary dialog.
3. Enter the **Name**, 'My Glossary' and a **Definition** of your choosing.
4. Click **Save** to create your new Glossary.

That's it!

Creating Terms in your new Glossary is just as easy. However, if you would like to create many Glossaries and Terms quickly and easily, we have an import function that can create Glossaries and Terms simply.

Import glossaries and terms

1. To import a .csv file, on the top ribbon, click **Glossaries**.
2. On the top right of the window, click the **Load Glossaries** button.
3. Browse and locate the *glossaries_demo.csv* file that is supplied for this example and click the **Load** button.

    NOTE: You are welcome to choose the glossaries_full.csv file, which is a much larger file, packed with Glossaries and Terms available for you to use. Please be aware that it will take a few minutes to import the fully loaded csv file.

    You can download the supplied files under Evaluation Resources on the main page of the Team Server wiki (http://docwiki.embarcadero.com/TeamServer/ERStudio/193/en/Main_Page).

You can now start to explore and relate Terms to your ER Objects.

Searching for terms – A usage example

To search for a Term, on the top ribbon, click **Terms**.

1. In the Search Bar, type 'Customer'.

   TIP: You will notice that as you type, the search function matches results while you are typing. This makes your time spent looking for items more efficient.

2. From the search results, click on the item **Customer** with a **Term Type of Sales**.

   The description of this *Sales Glossary* Term is "A person or organization that has expressed interest in a product by contacting our sales department." However, in the Marketing department, this may be referred to as a '**Prospect**'. Clearly defined business terms made available in your organization can explain and simplify the use of the same terms in different departments.

3. From the left Menu bar, click **Related Terms**, to see which other Terms might be useful to you, that you may not have directly searched for.

   In this example you can see that '**Prospect**' is a related term. Misunderstandings of similar terms in your organization can be overcome by relating terms, allowing your users to easily find and clarify business terms.
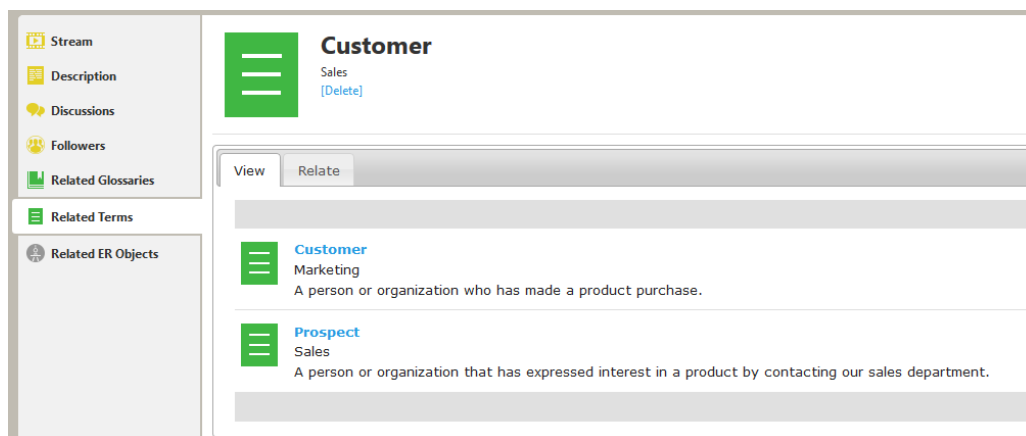
Filtering search terms

As you have found already, searching for Terms can be simple but powerful; giving your users the capability to collaborate effectively.

Sometimes users across your organization can be confused with different abbreviations and searching on the Internet can often just confuse matters. Your organization's Glossary, is the single, common source for truthful metadata for your organization.

If you would like to narrow your search, you can filter what is included in the search by changing the values in the **Search In** filters.

1. Click on **Terms** in the top ribbon, and then in the search box, type 'FOS'.
2. In the 'Search In' check boxes, clear all items except **Aliases/Synonyms**.
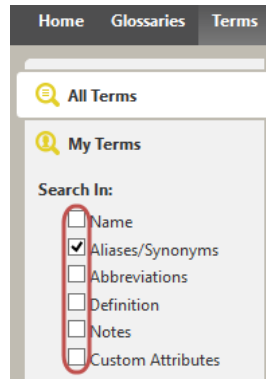
Only Factory Outlet Store is remaining from the search results. The Search In filters enable you to search not only queries the Term name, but also Aliases/Synonyms, Abbreviations, Definition, Notes (not by default) and Custom Attributes.

Setting up for further evaluation

Before viewing Model data in ER/Studio Team Server you will need to synchronize with the Repository data. Adding a Model to the Repository is done from ER/Studio.

Open ER/Studio Data Architect. If you need assistance on installation please see: Installing ER/Studio Data Architect.

ER/Studio Data Architect configuration

1. From your ER/Studio DA program window, Open the *AOE.dm1* file which is found with the evaluation files under Evaluation Resources on the main page of the Team Server wiki (http://docwiki.embarcadero.com/TeamServer/ERStudio/193/en/Main_Page).

2. Click Repository > Log In.

3. Log in using the name and password that you set during the Repository install.

4. In the Data Model Window (the left pane) right click theAOE.*dm1* Model icon and from the context menu, click **Add Diagram**. On the Add Diagram options window, click **OK** to add the diagram to the Repository.

5. Right Click the AOE.DM1 model icon again. You will now see more options available. Click **Check Out Diagram.** At this point you can also choose to check out the model exclusively if you require. For this demo, you can accept the default setting.

You have now added a diagram and *checked out* a diagram from the Repository!

This allows many users to collaborate on a model and *check in* their changes for

others to see. The icons change from a 'locked' padlock , to an open padlock

to show which objects you have checked out. Your model should now have green 'open padlock' icons.

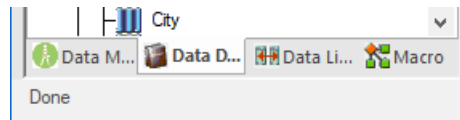# Setting up a sensitive data alert

1. Click the Data Dictionary tab to change the Data Model window to a Data Dictionary window.

   Expand the following selection **Data Dictionary > AOE_DD > Data Security Information > Data Security Classification** and double-click **Privacy Level**. You will be asked to check out the item from the Repository, click **Check Out** to open the editor.

2. In the **Data Security Property Editor**, change to the **Binding Information** tab and in the **Object Class List**, click on **Attribute**. In the **Object list** pane, expand **AOE.DM1 > AOE PDM > CrtCrd**. Select the checkbox for **CrtCrd**, which will include: CrdCrdID, CrdTyp, CrdNmb, ExpMonth, ExpYear, MdfDte.
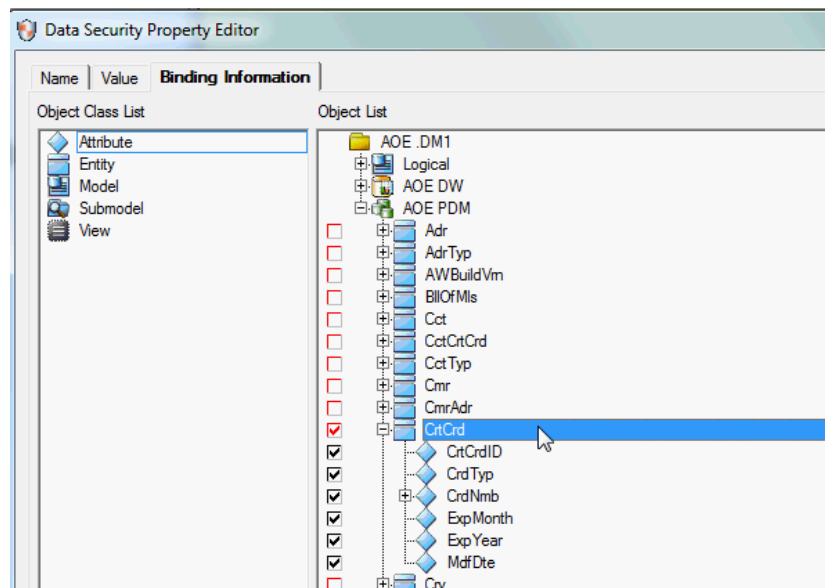
3. Double click **CrdNmb** and set the Value Override as 'Regulated Customer Info'.

4. Click **OK** to close the editor.

5. Right click **Data Dictionary > AOE_DD** and click **Check In Data Dictionary**.

6. Click **OK** to sync your changes. Then click **Yes** and **OK** in the following popup windows.

   NOTE: You have now bound information to columns in ER/Studio Data Architect.

7. Finally, right click the **AOE.DM1** in the data model window and choose **Check In Diagram**.

ER/Studio Team Server configuration

Now that you have synchronized your ER/Studio model to the Repository, we are going to publish the data model on Team Server to be able of view it and work it.

1. Log in to Team Server using a web browser and browsing to the server address/port, and username and password that you chose during installation.

2. Click **Publish Models** in the ribbon menu.

    NOTE: To publish the model, you will need to have added it to the Repository from ER/Studio DA.

3. Click the checkbox for the AOE.DM1 Project in the main window.

4. Click **Publish** to sync the Repository data to ER/ Studio Team Server.

5. If this is the first time you have visited the web page, you may have popups blocked in your web browser. If this is the case, you will need to 'Allow pop-ups' for your server's address by clicking on the alert bar.

6. Once the publication process is complete, you will see the status as *Published*. If you would like to check on progress, click refresh.

You have now published the Repository data in Team Server and it is ready to work!

ER/Studio Team Server configuration – Adding an alert

1. To set up an Alert, click **ER Objects** in the ribbon menu.

2. In the **Search Box**, type in '*Privacy Level.*' Click the Security Object **Privacy Level** in the Object list.

> **Privacy Level**
> AOE.DM1 > AOE_DD > Data Security Classification
> ER Object > Security
> This privacy level property specified the level of privacy for a given piece of information in...
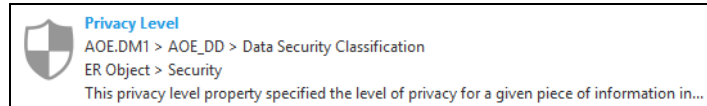
3. On the Privacy Level Security Object page, click **Alerts** from the left menu.

4. To create a new Alert, click the **New Condition** button.

5. Fill out the **New Condition Alert** settings, *Value, Regulated Customer Info, Warning* and any additional text you require.

New Condition Alert

Show Alert for Matching
- ○ Bound Object
- ● Value

Matching Value
Regulated Customer Info ▾

Alert Level
- ● Warning
- ○ Info

Notification Text
Regulated Customer Information! Not to be replicated without proper approval.

Save **Cancel**

6. Save the new Alert.

ER objects – Viewing alerts

Searching for ER Objects is made simple in Team Server.

1. From the top ribbon menu, click **ER Objects**.

2. In the search box, type '*credit card*.' You will see from the search result that the column CrdNmb is listed.

   The name of the column does not correspond with your search, but because Team Server is searching all fields, it makes it easy to find Objects that are abbreviated or shortened.

3. Open the ER Object **CrdNmb** and you can see the security alert that you set up earlier!

4. If you have a DB Artisan Team Server license, the alert that you see here is also available when viewing the column in DB Artisan.

Relating terms

It is very easy to relate Objects to Glossary Terms.

1. On the ribbon menu, click on **Terms**.

2. Type 'CLV' in search box.

3. Click on **Customer Lifetime Value** term.

4. Click **Related ER Objects** from the left menu.

5. Click the Relate tab.

6. In the **search box**, type 'datefirstpurchase' and relate it to the Customer Lifetime Value term using the **Relate** button.

Terms – Advanced use

You have already imported terms, and seen how relating different terms can be useful.

Let's have a look at a more advanced term.

NOTE: The related objects used here were set up in a previous section, see Relating Terms.

1. On the ribbon menu, click **Terms**.

2. Type 'Customer Lifetime Value' in to the search box.

   TIP: You can also type 'CLV' as the search will find the term through its abbreviation.

3. Click the Term **Customer Lifetime Value** to open the Term.

   In this example, you may have been asked to organize the data required for the CLV equation. Normally this information would be in disparate locations and finding and confirming that data may be a difficult process.

With the Terms you have set up in previous sections, you can simply click **Related ER Objects** and collect all of the data required for the equation. While having 'Stewards' listed for your Terms, you can easily find the organization's expert for that particular data.

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DB Team Server and DB PowerStudio product integration

DB Team Server can be integrated with the following DB Power Studio products:

- **DBArtisan** - aimed primarily at DBAs, DBArtisan provides a comprehensive DBMS toolbox. General feature categories include object management, a SQL editing, execution, and debugging environment, and a variety of monitoring and analysis tools.

- **Rapid SQL** - aimed at developers, Rapid SQL also features object management and a SQL editing, execution, and debugging environment. A collection of coding aids is also provided.

The following section is a read through only. To demo these features you will need a working data source and a DB Artisan installation. If you need an introduction to the features and benefits of these products, see DB Artisan product page and Rapid SQL product page for details.

Enabling and configuring DB Team Server usage

If you are familiar with either product, then you know that the Options Editor (**File > Options**) is where you set up DBArtisan/Rapid SQL features. A **Team Server** panel lets you enable DB Team Server usage and provide the URL required to connect. Once configured, a **Tools > Login** command lets you sign in to your DB Team Server instance.
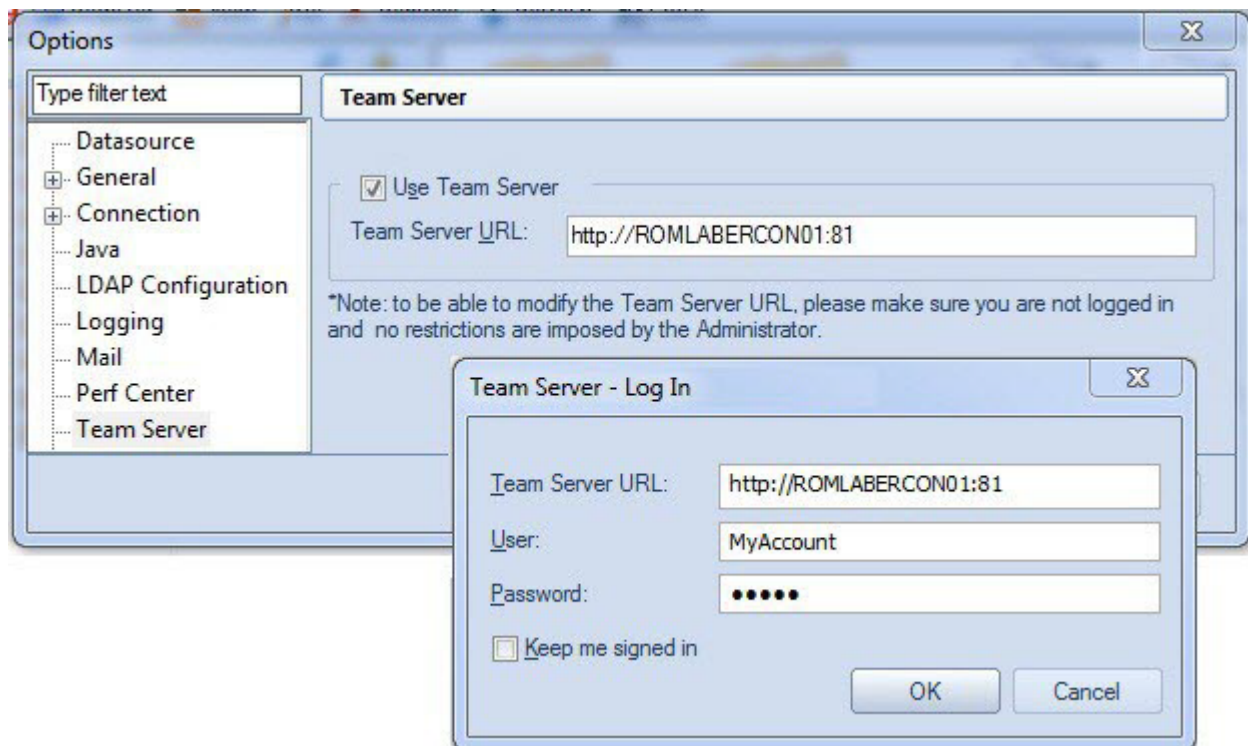
Using Team Server as the data source catalog
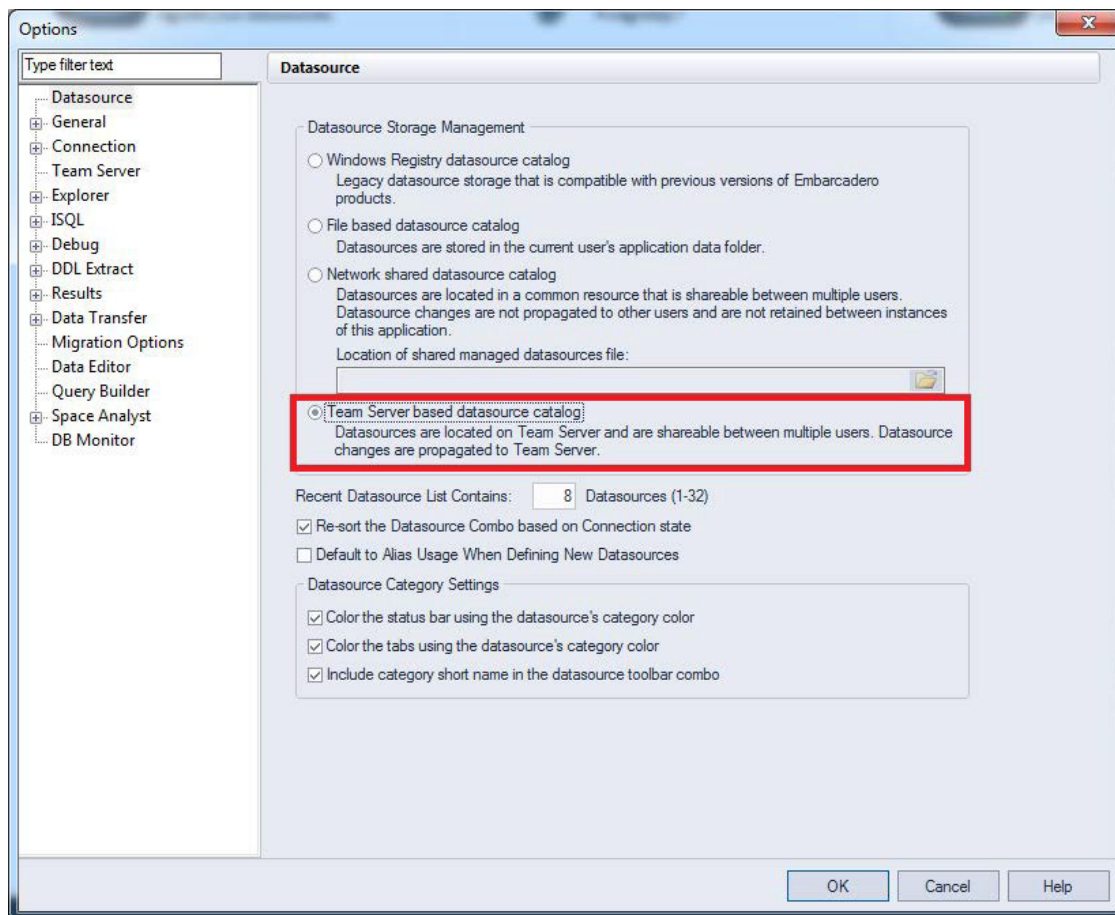
DBArtisan and Rapid SQL, also provides the option of registering data sources from the Team Server Repository. To allow that, there are two options. In Quick Start Setup, select **Use Team Server as the data source catalog**.


You can also go to **Tools > Options > Datasources** and select **Team Server based datasource catalog**.

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For organizations with multiple copies of Rapid SQL or DBArtisan, when a datasource definition must be changed due to an operational change, the change can be made in one location and automatically propagated to all Rapid SQL/DBArtisan instances. When registering a datasource to DBArtisan or Rapid SQL, a single control attaches the locally registered datasource to the Team Server version.
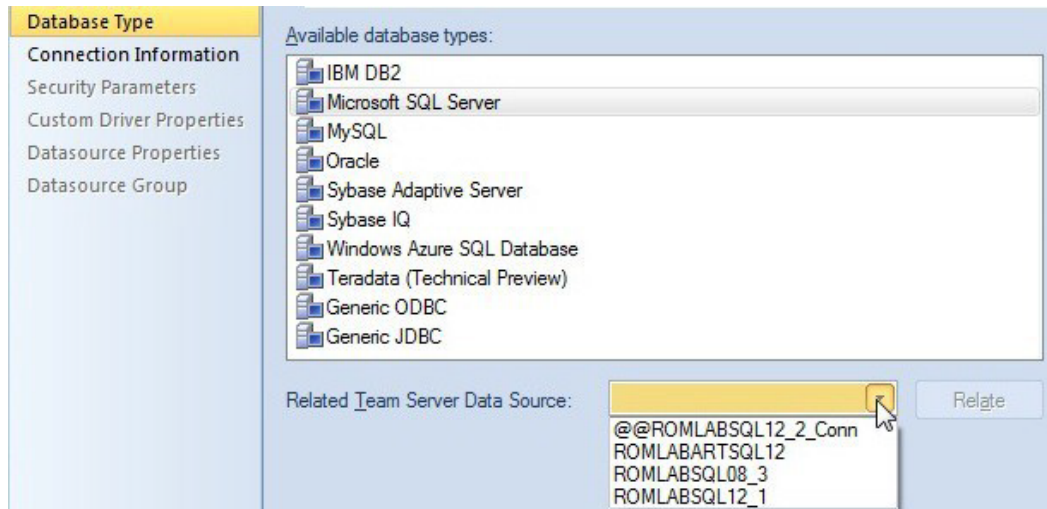

Once initially registered, an attached, local datasource definition is resynchronized with the Team Server version each time you connect to that datasource.

Other datasource management features

A Rapid SQL or DBArtisan user has access to a feature (**Datasource > Reconcile Data Sources**) that lets you manage multiple Team Server and local datasource definitions simultaneously.
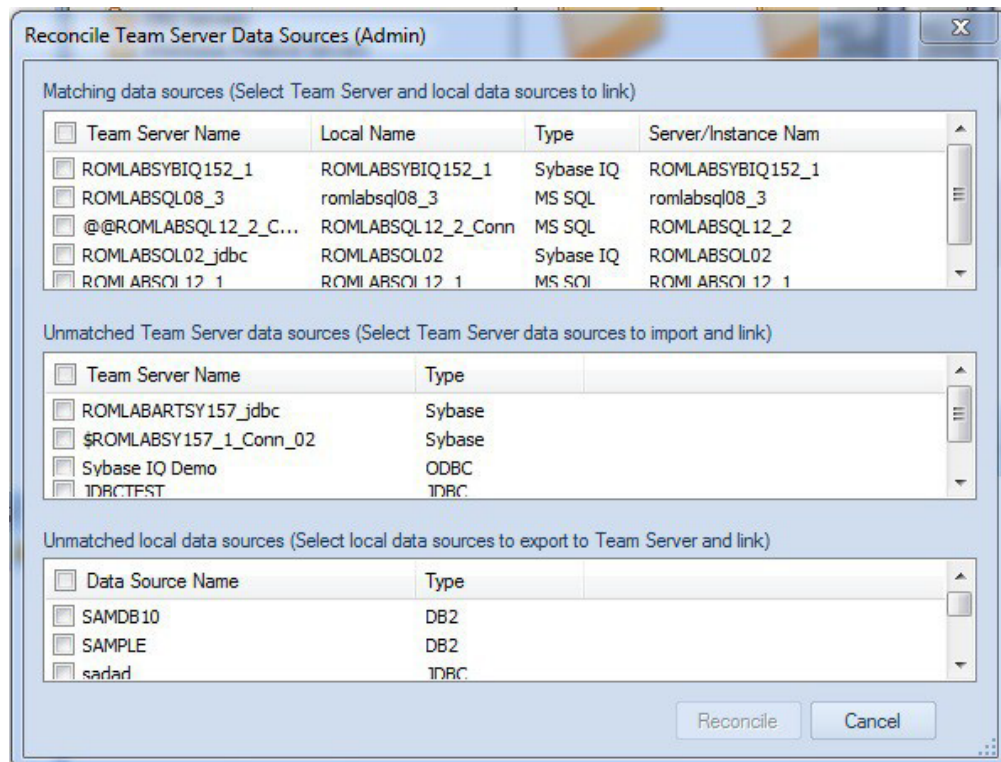
A full set of options is provided for managing the relationship between Team Server datasource definitions and those registered locally.

Advanced datasource search

In addition to simple browsing of datasources available on a DB Team Server instance, a **Datasource > Team Server Data Source Search** command issued from DBArtisan or Rapid SQL opens a dialog that lets you perform an advanced search of datasources.
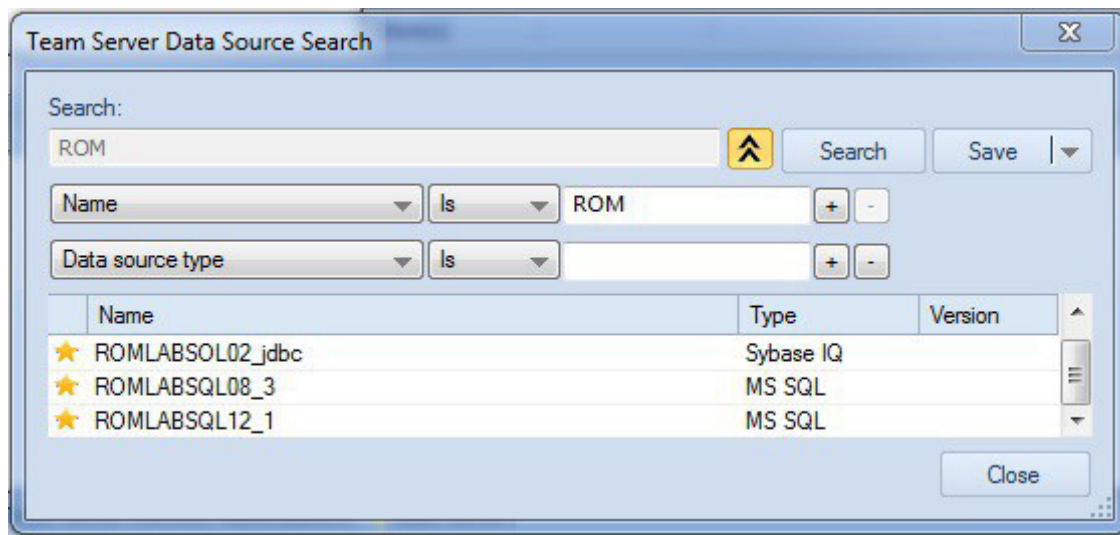
You can search by name or by one or more AND criteria. Specific conditions include items such as database type and version as well as operational characteristics like performance and storage details. The advanced search mechanism attempts to anticipate the differing needs across an enterprise. For example:

- IT personnel might be interested in all datasources with free space issues.

- A developer might be looking for all datasources of a specific DBMS type and version.

- A quality assurance engineer might be looking for a specifically-configured datasource in order to duplicate a customer issue.

Using model data in the SQL editor

Rapid SQL and DBArtisan both have powerful SQL Editor environments that let you develop, debug, and execute SQL scripts. Key features include automated coding assistance and error detection options. When you open a SQL Editor (**File > New > ISQL** in DBArtisan or **File > New SQL** in Rapid SQL) against a datasource attached to a DB Team Server definition, editor features can make use of associated model data.

For example, if a line of code references an object with associated meta data, a warning icon is displayed in the gutter, beside the page number. On execution, details from the model data for that object definition are displayed in the **Error** pane.

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```
1        select *
2 ⚠      from gim.dbo.BROKER t1
3        where t1.BROKER_FIRST_NAMES is not null
4 ⊗      and t1.BROKER_LAST_NAME is null
5
```

Batch	line	Column	Error type	Error Message
	2	6	Metadata Information	BROKER (Broker) Data Steward : Larry
	4	28 ⊗	Syntax	Encountered unexpected token "nulll"

Similarly, when hovering the mouse over a column name, table name or view name, a tooltip showing the entity/attribute description is displayed.

```
1        select *
2 ⊗      from gim.dbo.BROKER t1
3        where t1.BROKER_FIRST_NAME is not null and t1.BROKER_LAST_NAME is nulll
4        Metadata Information: BROKER (Broker) Data Steward: Larry
5
```

Subsequently clicking in the tooltip opens a browser window on DB Team Server, with the associated ER/Studio model data definition for that object.

While those features provide immediate access to model data from DB Team Server, you can also have entity/attribute information automatically written to a script. The Format feature, primarily aimed at beautifying code, is initiated using the **Format** button.

When invoked, a comment with element/attribute details is written to each line referencing an element with associated model data.

```
1        select t1.col1 "Agent_First_Name"
2        , t1.col2 "Agent_Middle_Initial"
3        , t1.col3 "Agent_Last_Name"
4        , t1.col9 "Agent_Years_With_Firm"
5        from GIM.dbo.FINTAB_44 /* Entity: Finance_Agent_Table */
```

A developer subsequently opening script, a function or procedure for example, can quickly see that it references data that may be regulated.

Other DB Team Server functionality

Miscellaneous DB Team Server functionality in Rapid SQL and DBArtisan includes:

- Users can monitor their own activity stream or the activity stream for a datasource definition. Similarly, users can open a window to monitor their notifications.

- Rapid SQL and DBArtisan let you open a browser window on the connected DB Team Server for direct access to Team Server features.

ER/Studio Team Server – More features

People

Collaborating is made easy with Team Server. On the top navigation menu through the People menu item, you have access to follow, discuss and collaborate with your social connections.

Glossary tooltips

To enable the Glossary Tool Tip feature:

1. Ensure you are running your Team Server window in Mozilla Firefox.
2. On the ribbon menu, click **Glossaries** and then click **Glossary Tool Tip**.
3. Install Greasemonkey add-on using the **Add to Firefox** link provided.
4. You may also receive a warning before installing similar to the following pop up message. Click 'Install Now' to proceed with the add-on installation.
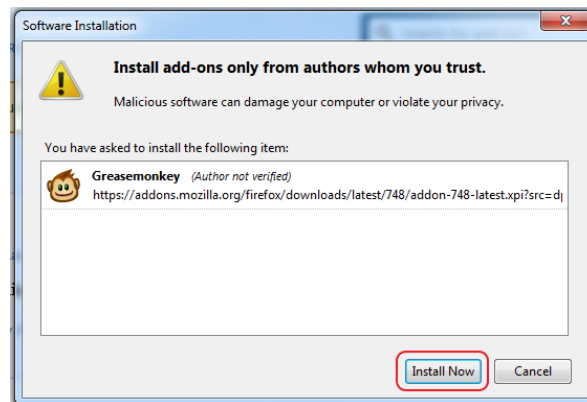
5. When the install has finished, click **Add Glossary Tool Tip**.
6. Click **OK** to install. NOTE: You may be required to restart your browser.
7. Click **My Settings > Admin**.
8. From the left navigation bar, click **Glossary Tool Tip**.
9. In the top right of the page, click **New Association**.
10. Fill out the fields of the New Association pop-up window, clicking **Add** to save each field before adding another.

    URL Patterns - The URL list of the web sites/pages that you would like to associate with your Glossary. Type in this field http://en.wikipedia.org/**.

    Glossaries - A list of one or more Glossaries that you would like to associate with the web sites in the URL Patterns field. Type 'Sales' then click **Add**.

    Definition - You can add a definition of your association between the URL and Glossary.

11. Click **Save**.

12. Go to http://en.wikipedia.org/wiki/Customert to watch the magic!

On the page that opens, you can see how the fields are highlighted, and when you hover your mouse over the highlighted 'customer' words, a definition is given from your Sales glossary.
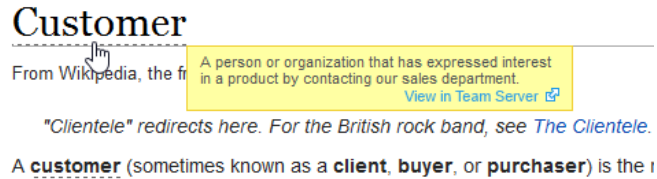
Conclusion

Thank you for completing the tutorials. It should have given you a good start to continue working with your diagrams in a collaborative environment. You should now know how to import and relate Glossaries and Terms, create Data Sources and Object alerts, and set up Glossary Tool Tips to enable user collaboration and simplify data compliance in your organization.

Additional evaluation resources

IDERA, Inc. provides a variety of resources to help support your evaluation and selection of a Data Modeling product for your organization.

Web site	Visit our Web site for current product and company information, educational materials, and supporting information. Visit https://www.idera.com.
Support	Please log a case through the website at https://www.embarcadero.com/support

Telephone Support

We encourage you to call us anytime you would like help or have questions during your evaluation, we value your feedback. Open a case online at: https://www.embarcadero.com/support

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