ER/Studio® Enterprise Portal 1.1
New Features Guide

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New Features Summary

This guide is organized into the following sections:

- Top New Features
- User Interface Improvements
- Other Improvements
- Details of Top New Features

Top New Features

The following are the top new features incorporated in ER/Studio Enterprise Portal 1.1.

New Search Engine

The Enterprise Portal now incorporates the Apache Lucene search engine, which provides high-performance, full-text search abilities.

Email and Favorites for Searches and Reports

You can now email the results of searches and reports. You can also save searches and reports, which will then appear on the home page in the Favorite Searches and Favorite Reports areas, respectively. From the home page you can email, delete, share, and run favorite reports and searches.

Enhanced Configuration Management

You can change configuration parameters of the application server without needing to reinstall the application. The Tomcat Configuration utility can be used to start, stop, and restart the application server and to change configuration parameters such as the amount of memory assigned to Tomcat for the application server. In addition to the Tomcat Configuration utiltiy, you can now change configuration of the Portal application using the ER/Studio Enterprise Configuration Manager. The Configuration Manager allows you to change parameters defined during installation. These parameters include those related to the Portal, ER/Studio Repository, LDAP, email, Solution, and Reporting servers. Using the Configuration Manager, you can reconfigure the Portal without needing to reinstall the application.

Enhanced ETL Interface

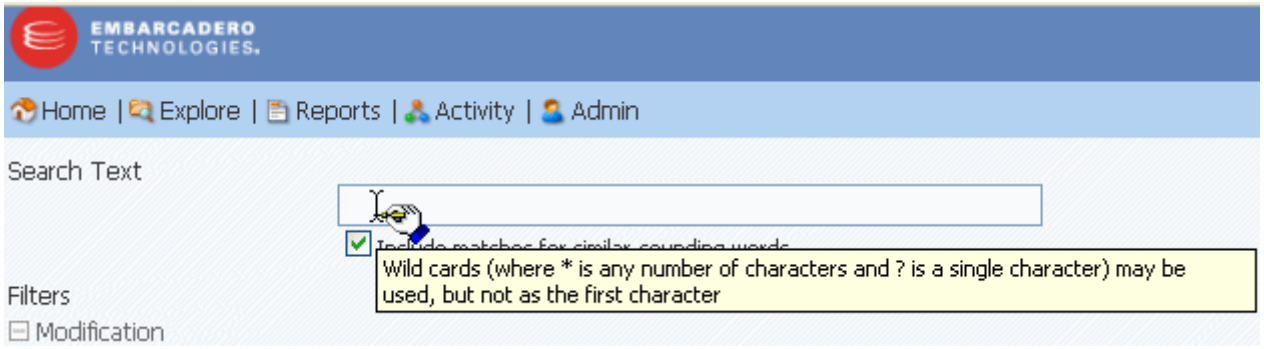
The enhanced Synchronization (ETL) interface gives administrators more control over what is synchronized and when the synchronization should occur. From this page, administrators can view the status of synchronization processes and initiate synchronization of all projects and diagrams, or choose to synchronize only selected diagrams and projects. The administrator can also choose to update, ignore, or delete information about each diagram or project when differences are detected between the Repository and Reporting databases.

User Interface Improvements

The following illustrate the improvements made to the User Interface for this release.

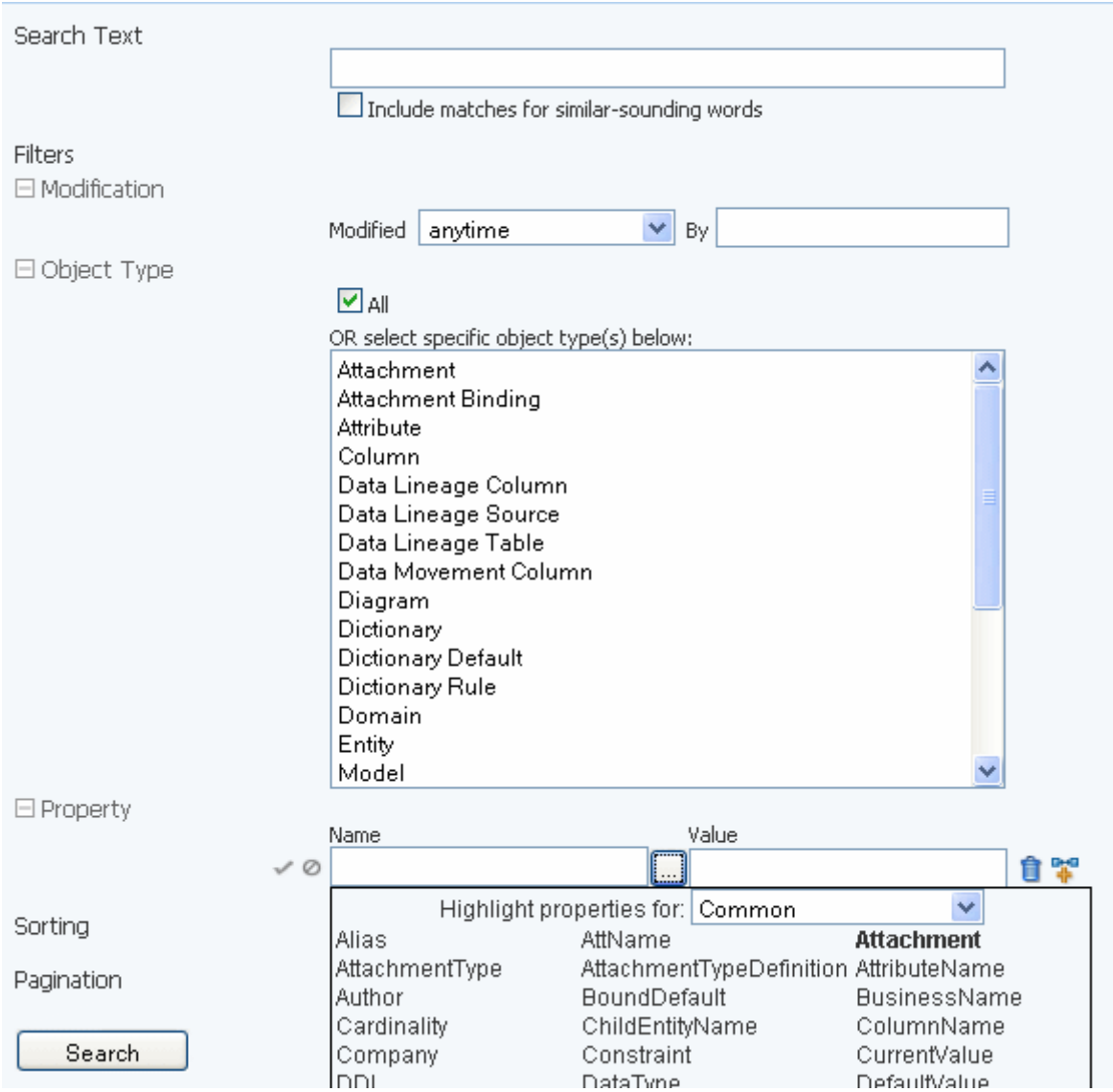
Entity Drill-Down Reports Include Project, Diagram, and Model Information

Search Using Wildcards



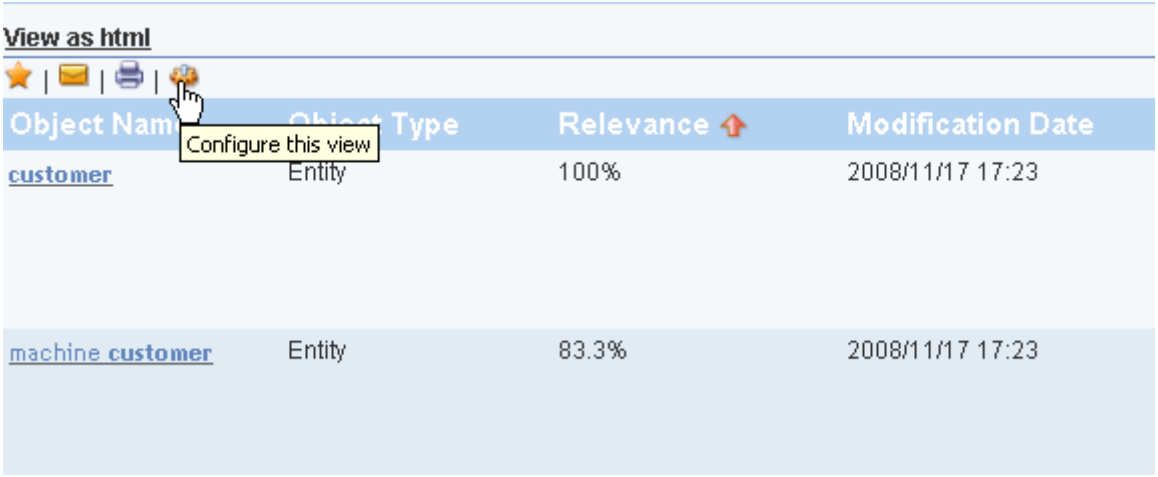
Search for Similar-Sounding Words

Search for Specific Properties and Object Types in Advanced Search

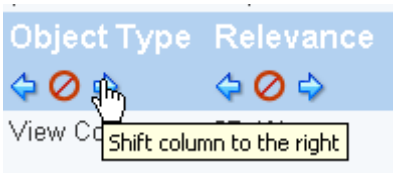


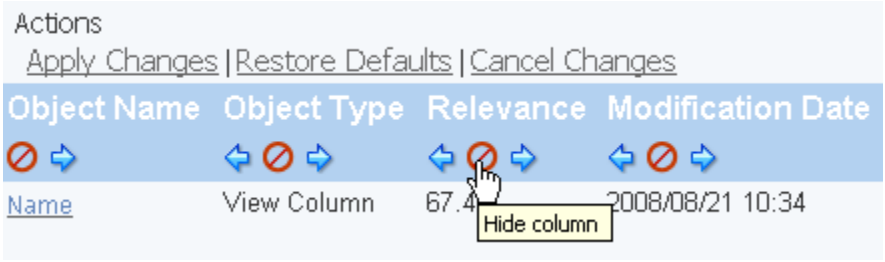
Customize Columns in Search Results View

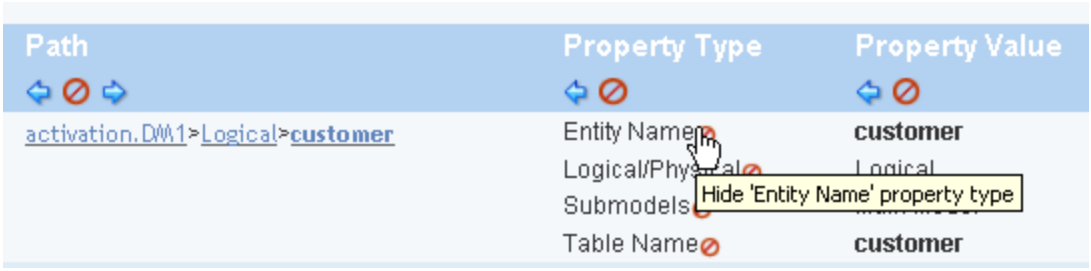
When viewing search results in table mode, click the configuration icon to customize the appearance of the results.



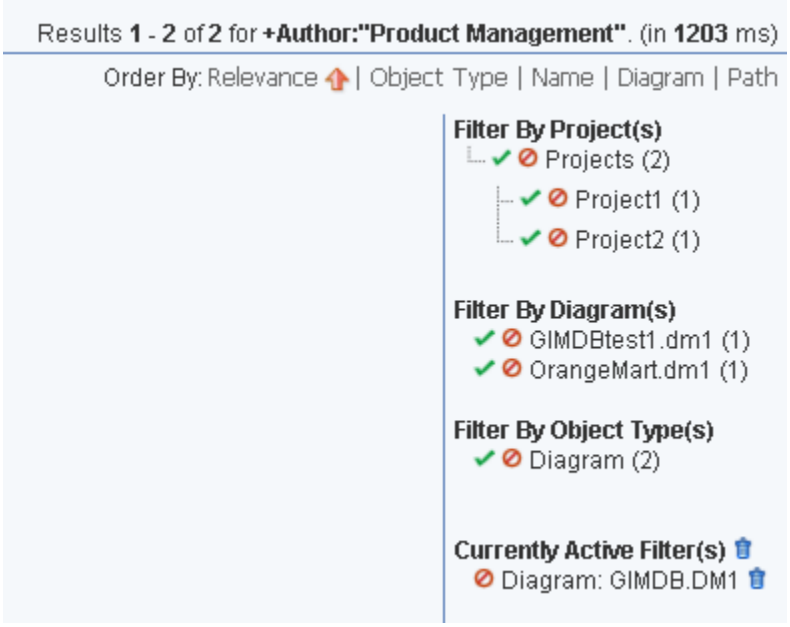
In configuration mode, you can change the column order and hide columns. You can also hide properties.



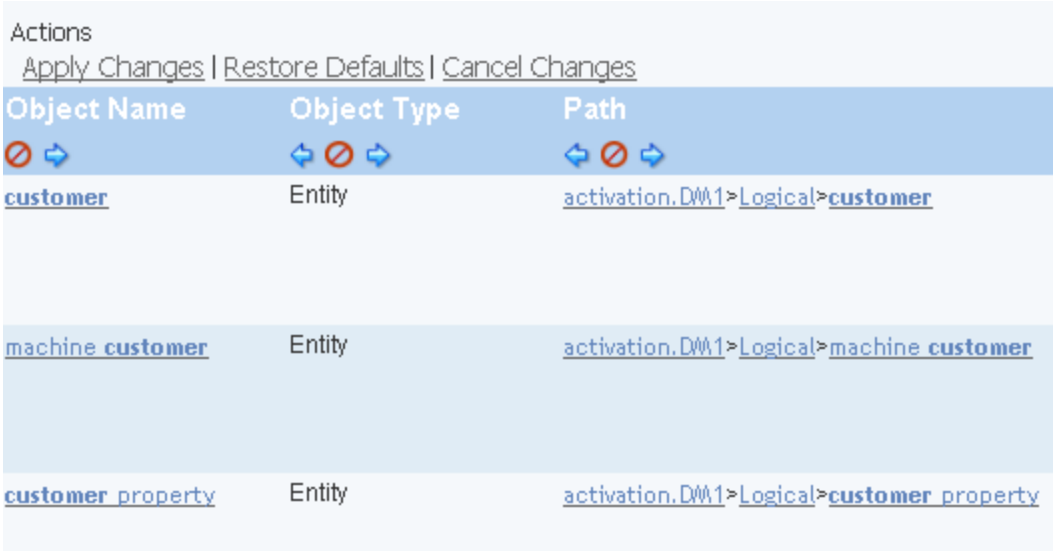




Filter Advanced Search Results for Specific Properties and Values

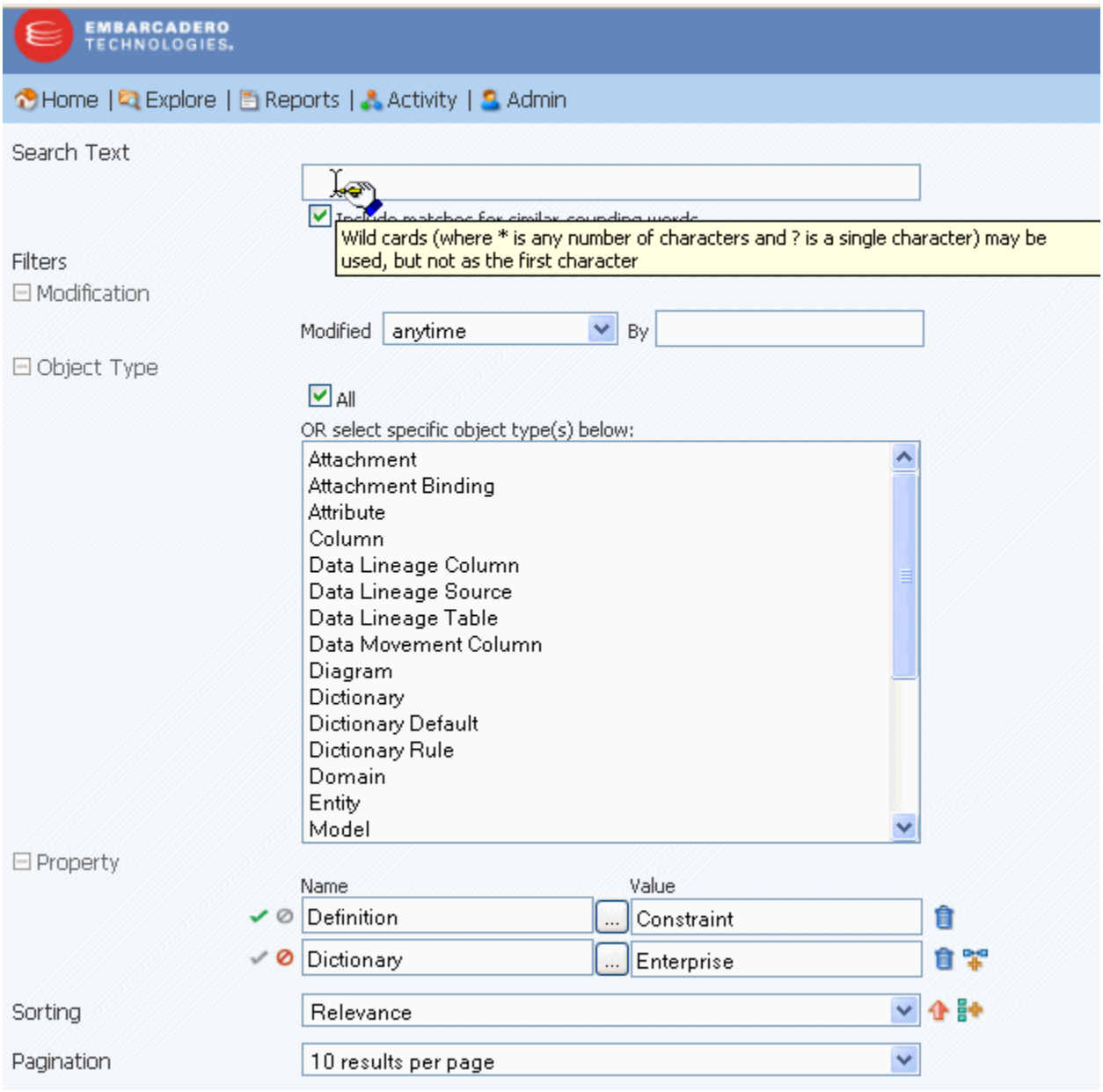


Search Results Include Full Context Information for Found Objects



Improved Search Functionality and Interface

Boolean searches are now supported in both the Simple and the Advanced searches and the interface to create the search makes it simple. Also, you can now search attachments and security properties.



Other Improvements

Licensing for ER/Studio Enterprise Users

The Portal uses three connection types:

- **Base Administrator Connection**: This is the grace connection that comes standard with the Portal.

- **Concurrent User Connection**: The total number of connections at one time is restricted to the number purchased. There is no restriction on a login name being used more than once simultaneously to instantiate multiple user sessions.
- **Exclusive User Connection**: The total number of connections at one time is restricted to the number of ER/Studio Enterprise licenses, including node locked and floating licenses. Exclusive user connections are assigned to an ER/Studio Enterprise user and the user cannot have more than one user session running at any one time.

Add-on licenses are concurrent licenses and have a serial number that must be registered for validation. You can also purchase additional add-ons with 5, 10, 20, or 50 connections.

Wildcards can help filter diagrams via the RepoRpt.xml file.

You can filter the content that flows from the ER/Studio Repository to the Reporting Data Base by diagram via the XML configuration file, *RepoRpt.xml* on the BI Server. You can exclude diagrams from processing by placing an entry into *RepoRpt.xml*. You can use wildcard characters such as * and ? when specifying diagram names and can also specify exceptions to the filters. Diagrams that are excluded from the synchronization process are not written to the reporting database and will not appear on the Synchronization Admin page. No further processing is performed on those diagrams, with the exception of removing their data from the reporting database. For example,

To process only diagram names ending with 1, use `<Diagram FILE_NAME="*1.dm1" FILTER="TRUE" /`

To process only diagram names such as CorDM2_v6B.dm1, D2.dm1, D1.dm1, and CorDM_v6B.dm1, use `<Diagram FILE_NAME="???dm*.dm1" FILTER="TRUE" />`.

You can also create an exception, which uses a filter value of false, such as FILTER="FALSE". Exceptions take precedence over other filters. Using regular filters and exceptions in combination makes it easier, for example, to filter all diagrams whose names start with the letter 'D' except for the diagram named 'Diagram123. For this case, the entries in RepoRpt.xml would be:

```
<Diagram FILE_NAME="Diagram123.dm1" FILTER="FALSE" />

<Diagram FILE_NAME="D*.dm1" FILTER="TRUE" />
```

Details of Top New Features

Top new features for this release include the following:

- New Search Engine
- Email and Favorites for Searches and Reports
- Configuration Manager
- Enhanced ETL Interface

New Search Engine

ER/Studio Enterprise Portal now incorporates the Apache Lucene search engine.

Use the Search feature to search for text strings within the Reporting database across diagrams, object properties, and object types. The search text you enter is treated as one string by the search engine and is matched accordingly. The Search engine features both a simple and an advanced search ability.

You can save the parameters of both the simple and advanced searches. Access saved searches from the Favorite Searches area of the Home page.

Searches can be executed immediately with results returned to the browser.

Both simple and advanced searches are executed against the search index where all searchable text properties are stored as property values. The Admin can place entries into an XML configuration file that will remove object properties from the search index.

Creating Special Search Strings (Using the Query Parser)

To make your searches more precise and to get more useful results, numerous operators are supported in the search string, including the following.

Operator	Search criteria	Example
AND (&&)	Contains ALL the search terms entered	apples AND oranges AND bananas apples && oranges && bananas
OR (||)	Contains at least one of the words entered	cats OR dogs cats || dogs
“ “	Contains the exact phrase entered	“exactly this”
	Does NOT contain some of the words entered	apples NOT oranges NOT bananas
+	Must contain a term and may contain another	+apples oranges
-	Must contain a term and must not contain another	+apples -oranges
?	Matches with a single character replaced	c? (matches cat but not coat
*	Matches zero or more characters	do* (matches do, dog, dogs, dogsled)
~	Terms are spelled similarly	land~ (matches land, sand, band)
“ “~	Terms are found in close proximity to each other	“diagram update”~10 (matches objects where diagram and update appear within 10 words of each other)

The Portal uses Apache Lucene Query Parser to enable these search string operators. There are some special characters that when used within the syntax must be escaped. The following are special characters:

+ - && || ! ( ) { } [ ] ^ " ~ * ? : \

To escape these characters, enter a backslash (\) before the special character.

For more details on the Lucene Query Parser, see http://lucene.apache.org/java/2_4_0/queryparsersyntax.html.

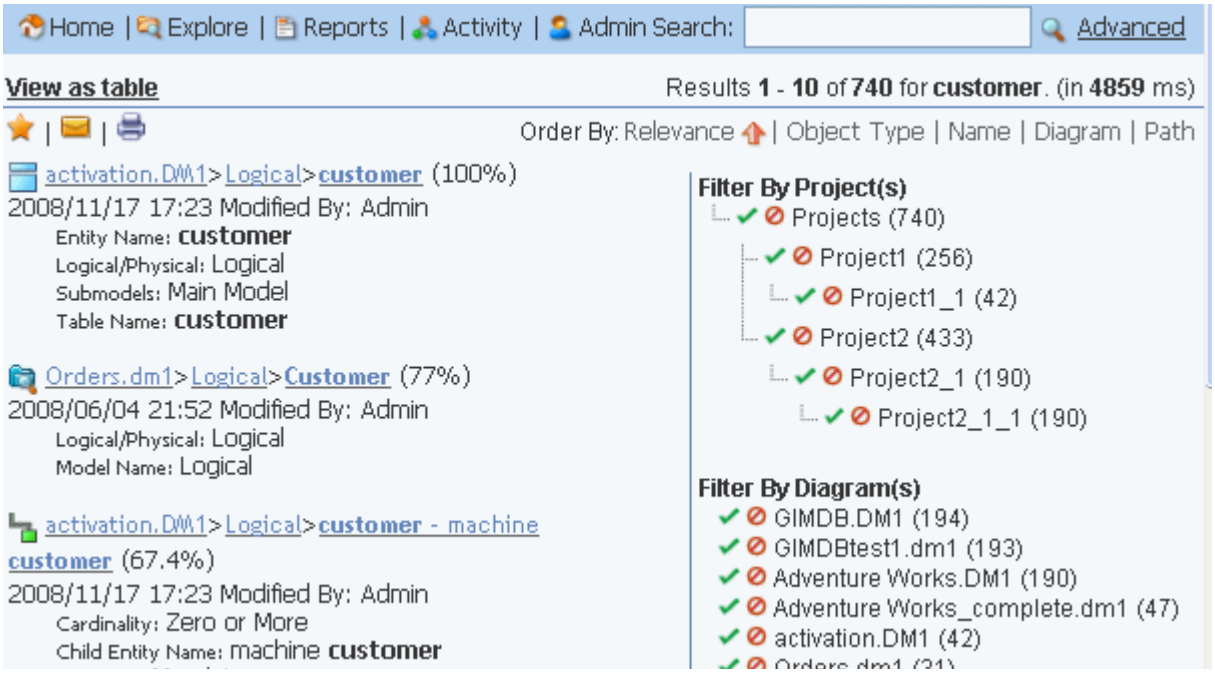
Email and Favorites for Searches and Reports

With a click of a button you can now save search or report criteria that can be run at any time and that can be shared with other users. You can also email the results of a search or reports just as easily.

Creating a Favorite Search

The format of the search results is the same for simple searches as it is for advanced. When you execute a simple or advanced search, by default all results are rendered as one page in the browser.

Click the star icon to save the current search criteria into the list of your favorite searches. Settings include the search string, Order By settings, and filters used.



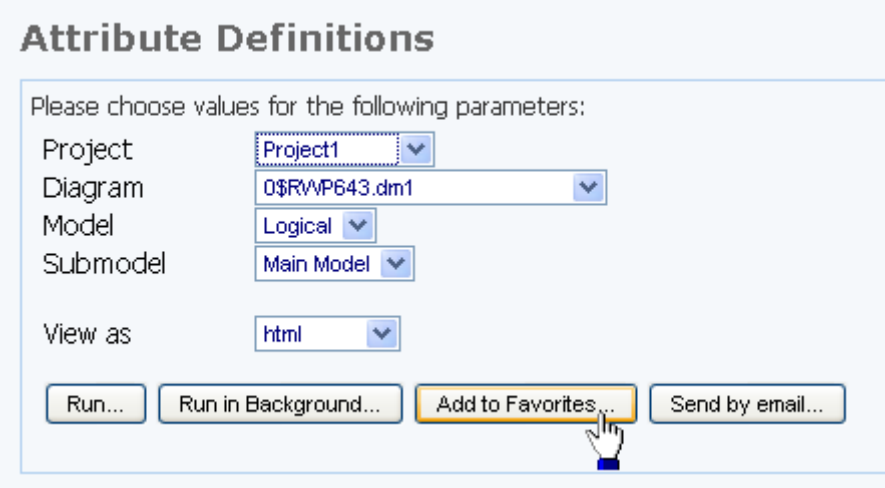
Creating a Favorite Report

You can save the parameters of a standard shared report, by running the report and then adding it to your favorite reports. This can be done for any of the standard reports.

1 From the **Home** page, click **Reports**

2 On the **Reports** dashboard, click **Business Reports** or **Technical Reports**, and then click the icon next to the report you want to run.

3 On the report page, make your parameter selections and then click **Add to Favorites** as follows.



4 Complete the **Add to favorites** dialog; enter a name and description of the report, click **Shared**, and then click **Submit**.

5 Return to the **Home** page where you will see your report listed in the **Favorite Reports** section.

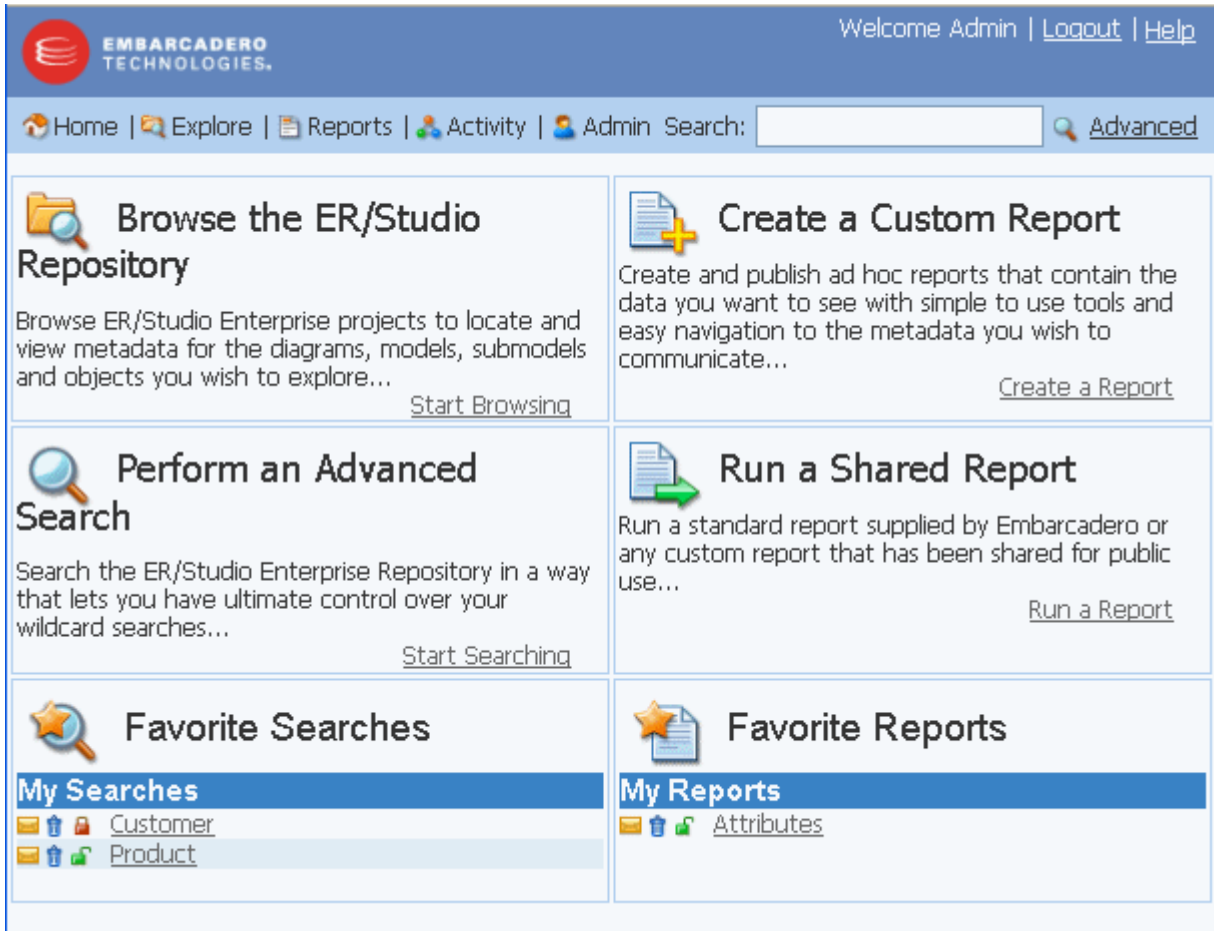
Now, you can run the named report whenever you want. Other users will see shared reports in the Shared Reports area of Favorite Searches.

NOTE: Although other users can see all shared reports, they can only successfully run reports that access objects that their user permissions grant them access to. Attempting to run a shared report that accesses objects to which permission has not been granted will result in an error.

Emailing Favorite Report and Search Results

In the Favorite Searches or Favorite Reports areas of the Home page, click the letter icon next to the name of the report or search to send the results to a user by email.

NOTE: You can enable sending of email and specify the email host parameters during product installation or at a later time using the ER/Studio Enterprise Portal Configuration Manager.


EMBARCADERO TECHNOLOGIES.
Welcome Admin | Logout | Help
Home | Explore | Reports | Activity | Admin Search: Advanced
Browse the ER/Studio Repository
Browse ER/Studio Enterprise projects to locate and view metadata for the diagrams, models, submodels and objects you wish to explore...
Start Browsing
Create a Custom Report
Create and publish ad hoc reports that contain the data you want to see with simple to use tools and easy navigation to the metadata you wish to communicate...
Create a Report
Perform an Advanced Search
Search the ER/Studio Enterprise Repository in a way that lets you have ultimate control over your wildcard searches...
Start Searching
Run a Shared Report
Run a standard report supplied by Embarcadero or any custom report that has been shared for public use...
Run a Report
Favorite Searches
My Searches
Customer
Product
Favorite Reports
My Reports
Attributes

Configuration Manager

ER/Studio Enterprise Portal now includes two configuration tools that are run from Windows, outside of the Portal application, the Tomcat configuration application and the ER/Studio Enterprise Portal Configuration Manager. For more information, see

- Using the Tomcat Configuration Application
- Using the ER/Studio Enterprise Portal Configuration Manager

Using the Tomcat Configuration Application

Use the Tomcat configuration utility to start, stop and restart the application server and to change Tomcat configuration parameters such as the amount of memory assigned to Tomcat for the application server.

1 From Windows, click **Start** > **Programs** > **ERStudio Enterprise Portal X.X** > **Configure Apache Tomcat (ERStudio Enterprise Portal)**.

2 Complete the changes on the Properties sheet that appears and then click **OK**.

The configuration parameters on the Properties sheet that appears are straight forward, but the following provides some additional information on the available options:

General tab

- **Startup** type: Click the list to change how the Portal starts up.
- **Service Status**: Use the options available to start or stop the Portal.

Logging tab

- **Level**: Click the list to change the logging level. By default, only error messages are logged.

Java tab

- **Initial memory pool**, **Maximum memory pool**, and **Thread stack size**: Change the amount of memory the Portal can use.

Using the ER/Studio Enterprise Portal Configuration Manager

Use the Portal Configuration Manager to change settings chosen during the installation process.

1 Ensure the Portal is not running.

Click **Start** > **Programs** > **ERStudio Enterprise Portal X.X** > **Configure Apache Tomcat (ERStudio Enterprise Portal)** and then in the **Service Status** area of the **General** tab, click **Stop**. If **Start** is the only option, the service is already stopped.

2 From Windows, click **Start > Programs > ERStudio Enterprise Portal X.X > ERStudio Enterprise Portal Configuration Manager**.

3 Complete the changes on the configuration manager that appears and then click **OK**.

4 For information on the configuration options, see the *Install Guide*, where each option is explained in detail.

Now you can restart the Portal. For more information, see “Starting the Enterprise Portal Application” in the *Install Guide*.

NOTE: Depending on the nature of the changes made, such as changing the location of the reporting repository, you may need to perform other administrative actions from the Admin dashboard, such as running the synchronization process, updating the solution repository and updating the search index.

Enhanced ETL Interface

The Synchronization (ETL) function of ER/Studio Enterprise Portal now gives you greater control over the synchronization process. From the Synchronization Administration page you can choose at the diagram or project level, whether an object should be updated, ignored or deleted.

Synchronizing the ER/Studio Enterprise Reporting database with the ER/Studio Enterprise Repository is necessary to obtain the latest model and configuration information. For example, when a user is assigned to a role in the ER/Studio, the user's new permissions will not be available to that user when he logs in to the Portal, until a synchronization is performed. Similarly, a new user added to the Portal will not have access to Repository models he has permissions to access until the Repository is synchronized with the Portal. You can schedule a complete repository update or update individual projects or diagrams as required. You can also control how and when the synchronization occurs, immediately in the background, at some specific time in the future or immediately in the foreground.

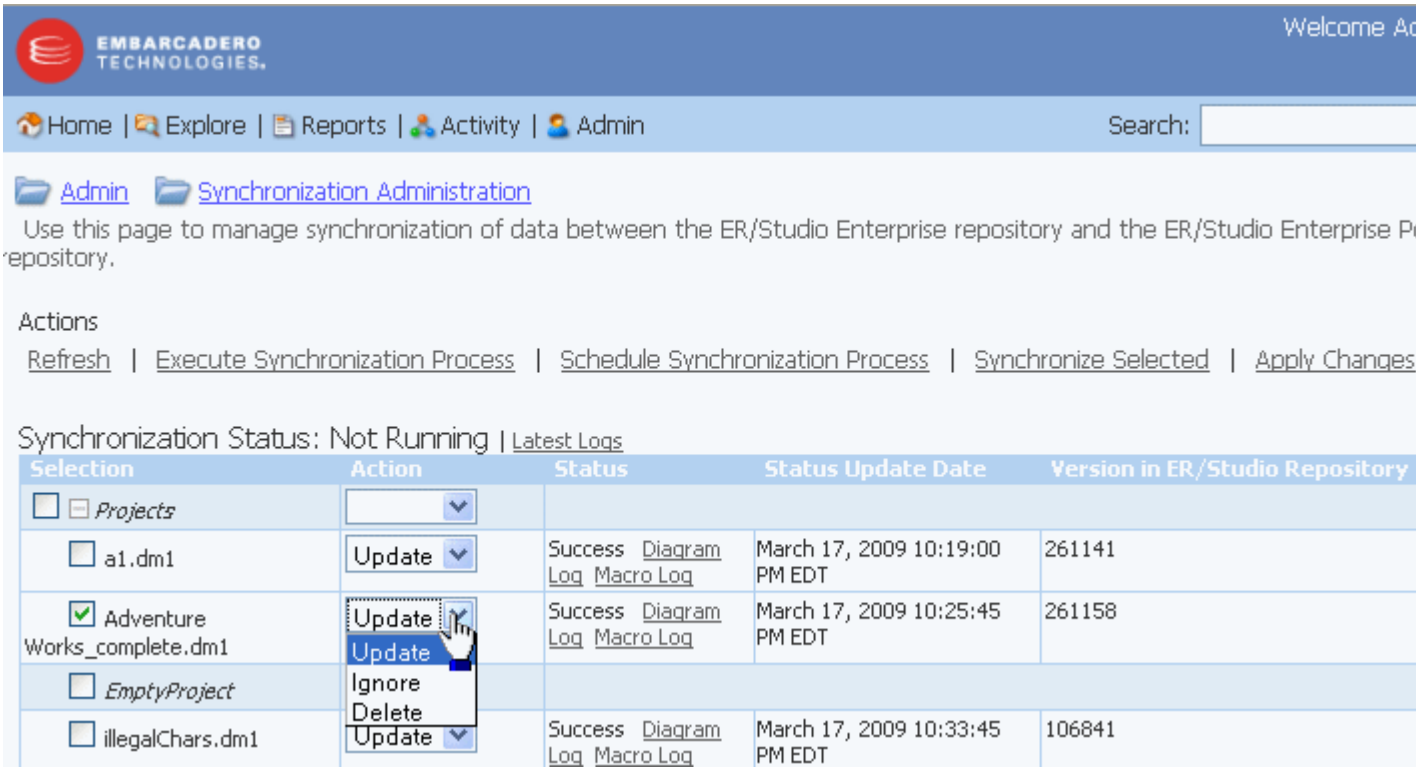
From the Synchronization Administration page, you can also access the logs of any synchronization process that has run.

When you select the Schedule Synchronization Process option, a job is created with a built-in schedule of running the synchronization process daily at midnight.

1 Click **Admin** to open the Admin services page.

2 Click **Synchronization (ETL)** and the Synchronization Administration page appears listing the available actions and the synchronization status of existing processes.

NOTE: You can change the synchronization action of the various objects only when synchronization is not running. The drop down list of actions is not available while a synchronization is in process.



The Synchronization Admin page also displays the status of the most recent execution of the synchronization process. Each item listed is a diagram in the ER/Studio Repository that may or may not be (depending on filters) synchronized with the Reporting repository. The list of items is sorted in descending order of status update date, that is, the items whose status have changed most recently appear at the top. Possible statuses for selected Projects and diagrams include the following:

- **Not Synchronized**: This is the initial status of new repository objects until the state changes to another status. An object can also have this staus if it was queued for synchronization but the synchronization was stopped.
- **Queued**: The selected object is scheduled to be synchronized during the current ETL synchronization.
- **Deleted**: The selected object has been deleted from the reporting database but it is still in the Repository database.
- **Processing**: Synchronization of the object is in progress.
- **Success**: Synchronization of the object has completed without error.
- **Error**: Synchronization of the diagram has finished with an error.

3 Select objects to synchronize.

To synchronize all repository projects and diagrams, click the highest level checkbox.

To synchronize individual projects or diagrams, click the checkbox next to the object.

4 Select the action to perform for selected repository diagrams or projects:

- **Update** is the default action and when chosen updates the Portal repository with information from the ER/Studio Repository.
- **Ignore** when chosen will not change the Portal repository information for the specified object, regardless of whether changes were made in the ER/Studio Repository for the object or not.
- **Delete** when chosen will delete the object from the Portal repository. This has no effect on ER/Studio Repository content.

5 To save the actions selected, click **Apply Changes**; otherwise, your choices will be in effect only for this synchronization session.