



Product Documentation

ER/Studio Team Server XE5

Quick Start Guide

Version 4.0.1
Published June 6, 2014

© 2014 Embarcadero Technologies, Inc. Embarcadero, the Embarcadero Technologies logos, and all other Embarcadero Technologies product or service names are trademarks or registered trademarks of Embarcadero Technologies, Inc. All other trademarks are property of their respective owners.

Embarcadero Technologies, Inc. is a leading provider of award-winning tools for application developers and database professionals so they can design systems right, build them faster and run them better, regardless of their platform or programming language. Ninety of the Fortune 100 and an active community of more than three million users worldwide rely on Embarcadero products to increase productivity, reduce costs, simplify change management and compliance and accelerate innovation. The company's flagship tools include: Embarcadero® Change Manager™, CodeGear™ RAD Studio, DBArtisan®, Delphi®, ER/Studio®, JBuilder® and Rapid SQL®. Founded in 1993, Embarcadero is headquartered in San Francisco, with offices located around the world. Embarcadero is online at www.embarcadero.com.

June 6, 2014

Table Of Contents

Introducing ER/Studio Team Server	3
Overview	4
Understanding ER/Studio Team Server Infrastructure	4
Understanding the User Interface	6
Installing ER/Studio Team Server	7
Installing ER/Studio Team Server	8
Licensing ER/Studio Team Server	15
Managing Licenses	15
Uninstalling ER/Studio Team Server	17
Common Tasks	18
Connect and Sync with ER Studio	18
View/Follow/Relate Objects	19
Add and Manage Users	19
Add a Glossary	20
Import Terms	20

TABLE OF CONTENTS >

INTRODUCING ER/STUDIO TEAM SERVER

ER/Studio Team Server is the next step in the evolution of the data modeling toolset for Enterprises of all sizes. ER/Studio Team Server is a data model and metadata collaboration platform for data professionals, developers, and business analysts, which provides greater meaning and context to enterprise data. ER/Studio Team Server improves the value of enterprise data by giving employees across the organization the ability to use and improve metadata, enabling faster and more effective decision-making with more accurate data.

ER/Studio Team Server empowers Database Professionals, Application Developers, and Business Professionals to better build, manage, and analyze data while enabling governance, compliance, and security. Embarcadero realizes that our customers need better awareness and understanding of their data and metadata, and now provides this unique solution for model and metadata collaboration. With features such as access control and a data source registry, data professionals can more effectively track and manage their data assets and access to them.

Product Benefits

- Allow any user to locate and completely utilize existing enterprise data via reports, glossaries, taxonomies and registries.
- Define and publish more valuable business and data definitions by leveraging integrated collaboration and social capabilities.
- Speed up comprehension and reduce the risk of data policy violations by attaching data governance policies to daily workflows and contextual alerts and tips.

This section is comprised of the following topics:

- [Overview](#)
- [Understanding ER/Studio Team Server Infrastructure](#)
- [Understanding the User Interface](#)

If you are already familiar with ER/Studio Team Server, you can jump straight to [Installing ER/Studio Team Server](#).

If you have already installed ER/Studio Team Server and are looking for what to do next, you can skip straight to the end and look at the [Common Tasks](#) section to get you up and running.

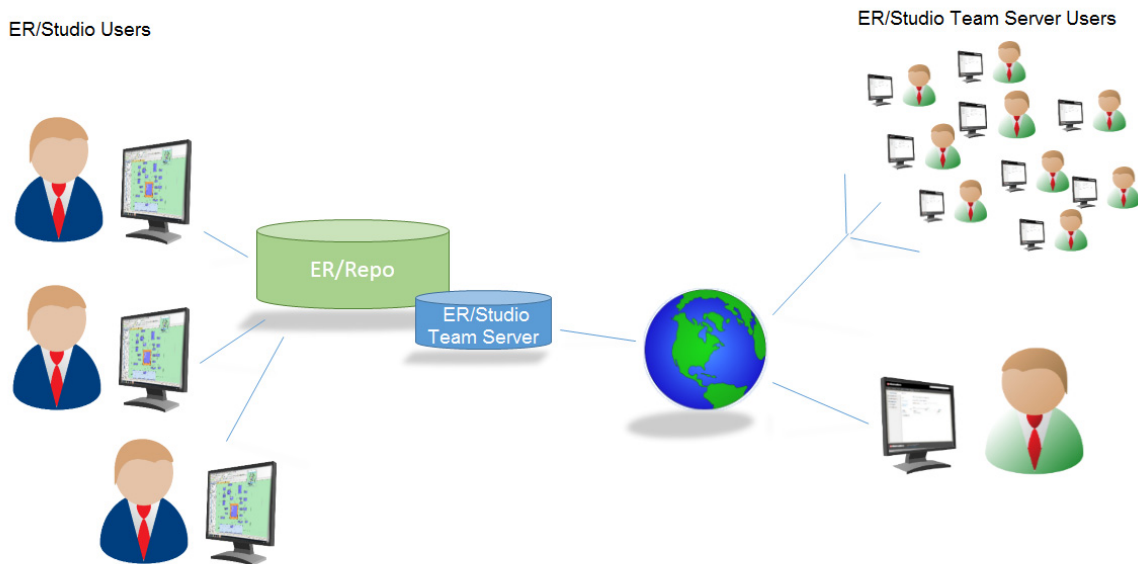
For more information and comprehensive guides, see the Embarcadero website at www.embarcadero.com.

OVERVIEW

ER/Studio Team Server enables you to search, view and manipulate all kinds of data in your ER/Studio Repository database, create reports, and then view the generated reports in easy-to-read formats.

The Team Server Repository is the database ER/Studio Team Server uses to store the information it gathers from the ER/Studio Repository.

The following graphic shows a simplified example of the creation, storage, and user access to the ER/Studio Repository.

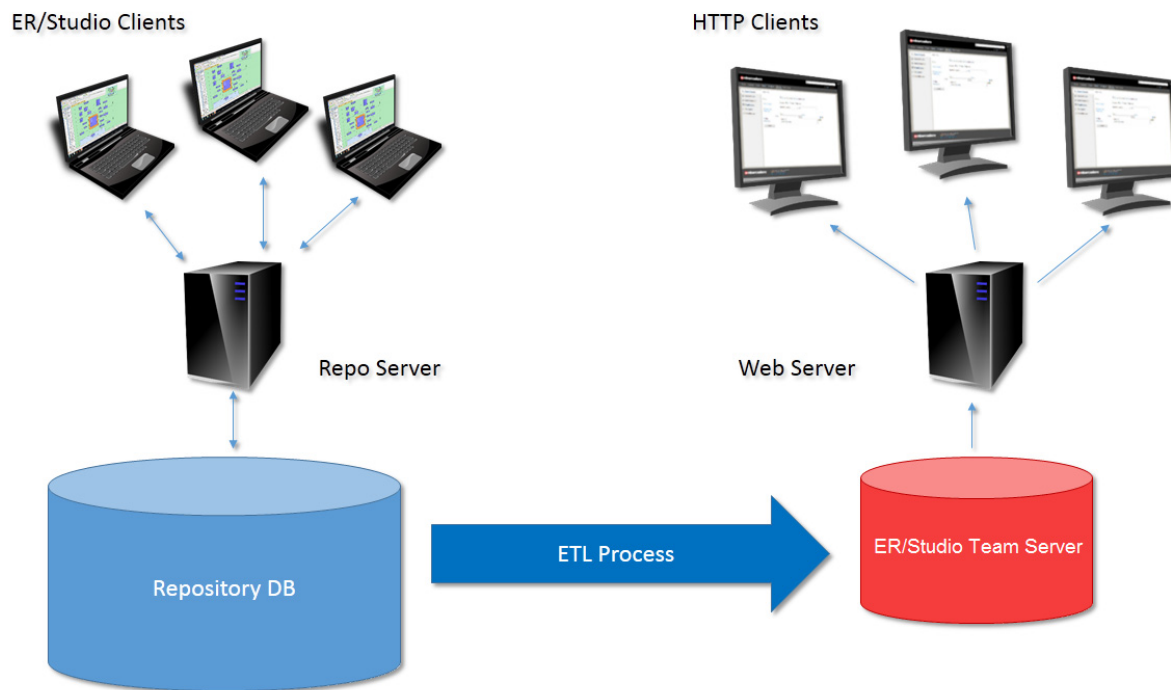


UNDERSTANDING ER/STUDIO TEAM SERVER INFRASTRUCTURE

ER/Studio Team Server is an add-on for the ER/Studio Enterprise edition which allows easy distribution of the repository metadata to the enterprise. The following lists the process of creating and accessing the metadata:

- The ER Model is created, maintained and modified by ER/Studio clients, directly through the Team Server web interface or via the REST API.
- The ER Model is stored in the ER/Studio Repository database.
- Through an extract, transform, and load process (ETL), that metadata is pulled into the reporting database which is synchronized on a scheduled basis with the source metadata.

- ER/Studio Team Server users can then browse, modify, search, and report on the synchronized metadata in the ER/Studio Team Server reporting repository.

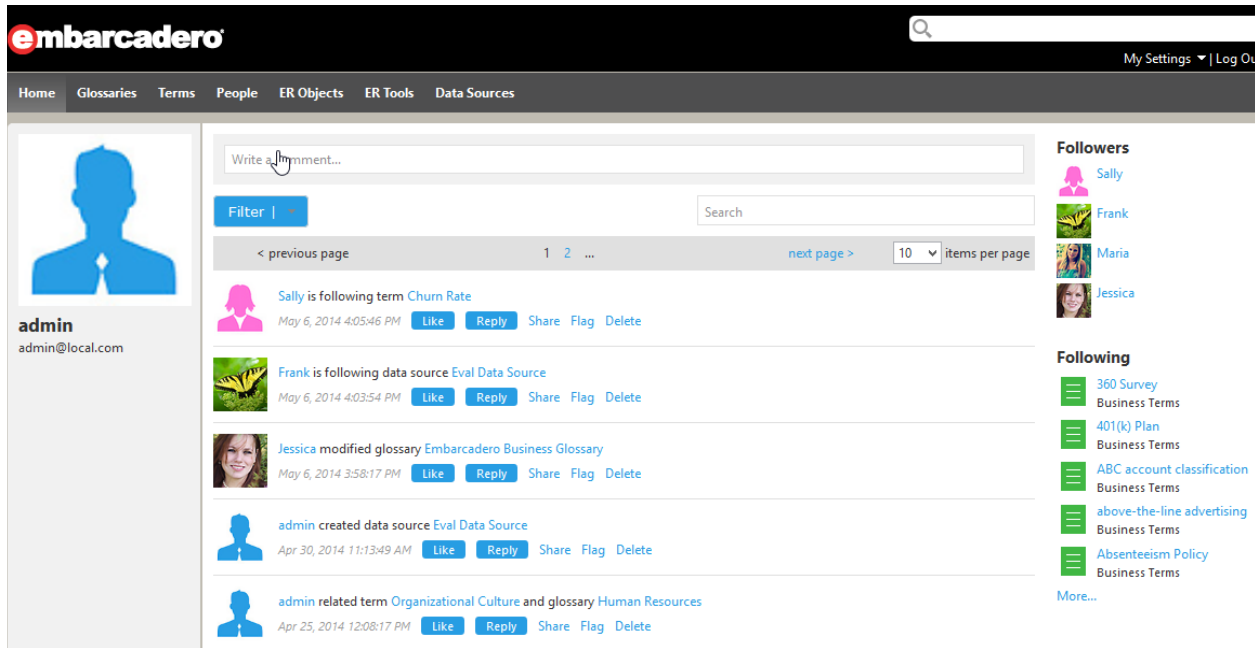


The following are the basic concepts of ER/Studio Team Server:

- **ER/Studio Team Server:** ER/Studio Team Server is the gateway to the reporting database. It uses HTML browsers through a Web server to deliver HTML pages.
- **Repository:** The database created and maintained by the ER/Studio Enterprise application. This is the repository that is extracted from the ER/Studio repository using the Extract, Transform, and Load process and made available to the ER/Studio Team Server user. This repository can be synchronized on a scheduled basis with the ER/Studio Repository.

UNDERSTANDING THE USER INTERFACE

The graphic below illustrates the main elements of the ER/Studio Team Server User Interface.



There are seven dashboards available:

Dashboard	Description
Home (Social)	Your personal Stream page showing your activity and the activity of resources you are following.
Glossaries	Web portal for your Glossaries, list, search, edit.
Terms	The Terms page is a search page that allows you to search for terms or create new terms.
People	The People page is a search page that allows you to search for ER/Studio TS users.
ER Objects	The ER Objects page is a search page that allows you to search for ER objects.
ER Tools	Allows you to navigate to the business and technical reports, and create custom reports. From here you can also access your favorite and shared searches and reports.
Data Sources	The Data Sources page is a search page that allows you to create or search for data sources or monitor current data sources.

Other settings and administration options are available. Please see the online documentation for more details.

INSTALLING ER/STUDIO TEAM SERVER

This section helps you install ER/Studio Team Server and is comprised of the following topics:

- [Technical Requirements](#) on page 7
- [Installing ER/Studio Team Server](#) on page 8
- [Licensing ER/Studio Team Server](#) on page 15

TECHNICAL REQUIREMENTS

ER/Studio Team Server is a 32-bit application that runs in a Microsoft Windows environment. Before installing ER/Studio Team Server, verify that your environment meets the hardware and operating system requirements.

HARDWARE REQUIREMENTS

The minimum recommended hardware requirements:

Hardware	Minimum Requirement
RAM	4 GB minimum
Disk Space	Hard Drive space - 740 MB minimum for installation

SUPPORTED DATABASE PLATFORMS

The supported database platforms for the Reporting and Solution databases are listed below:

- Oracle 9i, 10g, and 11g
- IBM DB2 UDB 8.x, 9.x and 10.x Server: Before installing ER/Studio Team Server on the DB2 platform, you must first create the Repository database. Allocate 32K for the tablespace pagesize.
- Microsoft SQL Server 2005 to 2014

NOTE: Ensure that you run SQL as a case-insensitive database as case-sensitive is not supported. Also set the SQL Server Configuration Properties to allow SQL Server authentication. ER/Studio TS only supports SQL Server Authentication.

OPERATING SYSTEM REQUIREMENTS

ER/Studio Team Server requires the following operating system environment:

- Microsoft Windows 2003 Server (32-bit only), 2008-12

- ** Microsoft Windows XP, 7 and 8 (for testing purposes only)

NOTE: We recommend that the reporting and solution databases be put on a separate machine from the one running the ER/Studio Repository database. The ideal setup would be if the ER/Studio Team Server application server resides on the same machine as the ER/Studio Repository server, as long as it has enough RAM.

- An available TCP/IP port. The default is 80. For more details, see ["Installation Wizard - Host and Port for ER/Studio T.S. Tomcat Server" on page 9.](#)
- Tomcat listens on port 8006 for the shutdown command. If this port is already in use, you can specify a different port using the ER/Studio Team Server Configuration Manager.
- Tomcat also uses ports 80 and 443 for http/https communications when SSL has been enabled.
- When installing on Windows 2008 R2 Server or Windows 7, do not install to the Program Files or Program Files (x86) directories. Windows security prevents an ER/Studio Team Server macro from writing to this directory and synchronization with the ER/Studio Repository will fail. Instead, install to `c:\embarcadero`, for example.

INSTALLING ER/STUDIO TEAM SERVER

The ER/Studio Team Server wizard-based installer guides you quickly through the installation process. This section describes installation prerequisites and the Installation Wizard.

You must have administrative privileges to run the install.

Important Notes

- Apache Tomcat is embedded in the ER/Studio Team Server installation.

Installation Wizard - Welcome

To start the installation process:

- 1 Double-click **setupwin32.exe** and the **InstallShield Wizard** dialog displays.

Installation Wizard - Software License and Support Agreement

The Software License and Support Agreement panel of the Installation Wizard displays the Embarcadero Technologies license agreement. You must accept the agreement to proceed with the installation.

Installation Wizard - Directory

- 1 Choose an empty destination directory where you want to install ER/Studio Team Server.
- 2 Optional. If you want users to be able to send results of searches and reports to an email address, click **Enable sending of Email**. Additional fields appear on this page of the installer where you must specify the details of your email server and any authentication required.

Installation Wizard - Host and Port for ER/Studio T.S. Tomcat Server

On this page you must specify the following:

- **Host Name:** The value in the Host field must be the host name of the server; the name of the machine you are running the installer on and that will run the ER/Studio Team Server application; such as `DEWKBROW01`; or the fully qualified network name, such as `DEWKBROW01.embarcadero.com`; or the IP address of the system you are installing on, such as `10.10.23.201`.
- **Port:** The default port number is 80, although port 8080 is also commonly used.
- **Shutdown Port:** This is the port ER/Studio Team Server listens to for the shutdown command. The default is 8006 but you can change it here if there is a conflict.
- **Windows User/Password:** Enter the name of a Windows user ER/Studio Team Server can use to interact with the Windows desktop. The user must have administrative privileges.

Install Wizard - Secure Communication - optional

You can optionally choose to enable SSL and HTTPS. It is recommended that you enable secure communications as this will keep your password transmissions secure.

- If you do not have SSL set up on your server, you can click the **Self-Signed** button to take you through the short wizard which will create a Keystore file allowing you to use encryption.
- Fill out the fields of the *Self-Signed wizard* and click **Next**. The Keystore file will be created in the location of your choosing.

Install Wizard - Enable LDAP - optional

To enable users to log in to ER/Studio Team Server using their domain names and passwords and the Lightweight Directory Access Protocol (LDAP), select Enable LDAP Authentication. Additional fields will appear on the dialog where you must specify the LDAP server details and DN for authentication. Further information on setting up LDAP authentication with ER/Studio Team Server is available at <http://docwiki.embarcadero.com>. You can also set this after installation in the Team Server Configuration Manager.

Install Wizard - Repository

Specify the target ER/Studio Repository that is the information source for the Reporting Repository. The Reporting Repository is the database ER/Studio Team Server uses to store the information it gathers from the ER/Studio Repository.

Field	Description
Repository Server	
Version	Select the corresponding version of the ER/Studio Repository, 5.5, 6.0 or 6.5/6.
Repo Server Name	Specify the name of the machine where the ER/Studio Repository is installed.
Super User Login	Specify the user name for a user with the Super User role in the ER/Studio Repository. This has a default of 'Admin'
Password	Specify the password for a user with the Super User role in the ER/Studio Repository. This has a default of 'Admin'
Repository Database	
DBMS Server Type	Select the server type: <ul style="list-style-type: none"> • Oracle • IBM DB2 Universal Database • Microsoft SQL Server
DBMS Host/Port	Specify the host name of the machine that contains the ER/Studio repository database. This information is supplied by the DB Administrator. <i>For SQL Server only, if the ER/Studio Repository runs on a SQL Server database that is a named instance, specify the host name in the format of <code>HostName\NamedInstanceName</code>, such as <code>DEWKBOW01.embarcadero.com\RepositoryServer</code>.</i>
DataBase Name	Enter the name of the ER/Studio Repository database.
Enable Encryption	This option is available for the Microsoft SQL Server only. Select to enable Secure Sockets Layer (SSL) communication protocol which encrypts messages between the ER/Studio Team Server user and the ER/Studio Repository. When SSL is enabled ER/Studio Team Server uses ports 80 and 443 for secure communications.
User Name	Enter the user name for the ER/Studio Repository database. This will be your database super user of given to you by your DB Admin.
Password	Enter the password for the ER/Studio Repository database.

- 1 After you have entered the required information, click **Connect** to test the JDBC connection.

Install Wizard - Reporting Repository

On this page specify the details for the Reporting Repository.

NOTE: There may be naming conflicts between the ER/Studio Repository and the Reporting Repository. If both repositories are installed on the same database server, different schema owners should be used.

Enter the information as indicated below.

Field	Description
DBMS Server Type	Select the server type: <ul style="list-style-type: none"> • Oracle • IBM DB2 Universal Database • Microsoft SQL Server Note: The DBMS server type must match that of the ER/Studio Repository.
DBMS Service Host: Port	Enter the host name and port number of the DBMS Service. The DB Administrator can provide you with this information. For SQL Server only, if the Reporting Repository will run on a SQL Server database that is a named instance, specify the host name in the format of <i>HostName\NamedInstanceName</i> , such as <i>DEWKBOW01.embarcadero.com\ReportingRepository</i> .
The information requested depends on the server type selected: Database Name (if MSSQL is selected) SID (if Oracle is selected) DBName (if IBM DB2 is selected)	This information is supplied by the DB Administrator. <ul style="list-style-type: none"> • For IBM DB2 Server only, an additional field appears where you must enter Tablespace information. With DB2, the tablespace must exist in the database and must be usable by this user with the input database name. • For Oracle Server only, an additional field appears asking for Tablespace information. With Oracle, the tablespace must exist in the database and it can be used by the input admin user.
Enable Encryption	This option is available for the Microsoft SQL Server only. Select to enable Secure Sockets Layer (SSL) communication protocol which encrypts messages between the ER/Studio Team Server user and the Reporting Repository.
Database Admin User	This information is supplied by the DB Administrator. The Admin User must have the privilege to create reporting database tables, etc.
Database Admin Password	This information is supplied by the DB Administrator.
Same as Admin (This is only available for the MSSQL database.)	If the Same as Admin is not checked (default setting), you need to enter a User Name and Password for read/write access to the reporting database and click Next .
User Name (This is only available for the MSSQL database.)	Enter the User Name necessary to access ER/Studio Team Server's Reporting Repository.
Password (This is only available for the MSSQL database.)	Enter the Password necessary to access ER/Studio Team Server's Reporting Repository.

Select one of the three options for connecting to the Reporting repository and click **Connect**.

Option	Description
Initialize an existing, empty database	<p>This assumes that the Reporting Repository database exists and it is empty with no tables. The "Admin" user must have the privilege to create Reporting Repository schema. The Installer will run the SQL to create the Reporting Repository.</p> <p>Note: The Reporting Repository must be previously, manually created by the Database Administrator.</p> <p>ER/Studio Team Server installer is now ready to insert the Reporting Repository tables. For an Oracle DB, the SID must exist for the installer to insert the tables with the given user as the Owner.</p>
Connect to an existing Repository database	<p>If you choose this option, the Reporting Repository must exist and all Reporting Repository tables must be ready to be accessed by ER/Studio Team Server.</p> <p>Note: If you are upgrading your ER/Studio Team Server installation, select this option to retain your connection to the ER/Studio Repository. If you choose this option, after installing you must update the search index via the Admin dashboard.</p>
Reinitialize current Repository database	<p>The Reporting Repository database exists. The install will drop all reporting tables and create a new reporting schema. The "Admin" must have the privilege to drop the tables and create the Reporting Repository schema.</p> <p>Caution: This is a destructive action.</p>

After the connection is established the **Next** button becomes available.

Installation Wizard - Solution Repository

If you reinitialize or connect to an existing Reporting DB you must specify the details for the runtime database called the Solution Repository. This is the location where the access control list, report settings, and other runtime information is stored and maintained. Requests made to the platform to have actions executed rely on the action being defined in the Solution Repository. Enter the information as indicated below.

Field	Description
DBMS Server Type	<p>Select the server type:</p> <ul style="list-style-type: none"> • Oracle • IBM DB2 Universal Database • Microsoft SQL Server <p>Note: The DBMS server type must match that of the ER/Studio Repository.</p>
DBMS Service Host: Port	<p>Enter the host name and port number of the DBMS Service. The DB Administrator can provide you with this information.</p> <p><i>For SQL Server only, if the Solution Repository will run on a SQL Server database that is a named instance, specify the host name in the format of <code>HostName\NamedInstanceName</code>, such as <code>DEWKBOW01.embarcadero.com\SolutionRepository</code>.</i></p>

Field	Description
<p>Information requested here depends on the server type selected:</p> <p>Database Name (if MSSQL is selected)</p> <p>SID (if Oracle is selected)</p> <p>DBName (if IBM DB2 is selected)</p>	<p>This information is supplied by the DB Administrator.</p> <ul style="list-style-type: none"> • For IBM DB2 Server, an additional field appears where you must enter Tablespace information. With DB2, the tablespace must exist in the database and must be usable by this user with the input database name. • If you select the Server Type Oracle an additional field appears asking for Tablespace information. With Oracle, the tablespace must exist in the database and must be usable by the input admin user.
Enable Encryption	This option is available for the Microsoft SQL Server only. Select to enable Secure Sockets Layer (SSL) communication protocol which encrypts messages between the ER/Studio Team Server user and the Solution Repository.
Database Admin User	This information is supplied by the DB Administrator. The Admin User must have the privilege to create solution database tables, etc.
Database Admin Password	This information is supplied by the DB Administrator.
<p>Same as Admin</p> <p>(This is only available for the MSSQL database.)</p>	<p>If <i>Same as Admin</i> is not selected (default setting), you need to enter a User Name and Password for read/write access to the solution database and click Next.</p> <p>If <i>Same as Admin</i> is selected, the User Name/Password fields disappear and the Admin Name and Password are used as User Name and Password.</p>
<p>User Name</p> <p>(This is only available for the MSSQL database.)</p>	Enter the User Name necessary to access ER/Studio Team Server Solution repository.
<p>Password</p> <p>(This is only available for the MSSQL database.)</p>	Enter the Password necessary to access ER/Studio Team Server Solution repository.

2 Select one of the three options for connecting to the repository and click **Connect**.

Option	Description
Initialize an existing, empty database	<p>The Solution Repository exists and is empty. The "Admin" user must have the privilege to create Solution Repository schema. The Installer will run the SQL to create the Solution Repository.</p> <p>Note: The Solution Repository must be created by the Database Administrator.</p> <p>ER/Studio Team Server installer is ready to insert the Solution Repository tables. For an Oracle DB, the SID must exist for the installer to insert the tables with the given user as the Owner.</p>
Connect to an existing Repository database	<p>The Solution Repository exists and all Solution Repository tables are ready to be accessed by ER/Studio Team Server.</p> <p>Note: If you are upgrading your ER/Studio Team Server installation, select this option to retain your connection to the ER/Studio Repository. Permissions will be preserved but some of the solution repository information such as logs, will become obsolete. If you choose this option, after the installation you must update the solution repository via the Admin dashboard. If inherited roles were used, you must synchronize the repository.</p>
Reinitialize current Repository database	<p>The Solution Repository database exists. The install will drop all solution tables and create a new solution schema. The "Admin" must have the privilege to drop the tables and create the Solution Repository schema.</p> <p>Caution: This is a destructive action.</p>

Once the connection is established the **Next** button becomes available.

Changing Configuration Parameters

The Configuration Manager allows you to change parameters defined during installation. These parameters include those related to ER/Studio Team Server, ER/Studio Repository, LDAP, email, Solution, and Reporting servers. Using the Configuration Manager, you can reconfigure ER/Studio Team Server without needing to reinstall the application. For more information, see "Using the ER/Studio Team Server Configuration Manager" in *ER/Studio Team Server User Guide* and online help.

Starting ER/Studio Team Server

Once the installation is complete, a web login page will appear. Or open a supported Web browser and browse to `http://<host>:<port>`, where <your host> and <your port> are the values you specified in the [Installation Wizard - Host and Port for ER/Studio T.S. Tomcat Server](#) fields above. Enter a valid login and password for the ER/Studio Repository as specified in the ER/Studio Team Server installer. If you have chosen to enable LDAP (Lightweight Directory Access Protocol) during the installation, you will need to provide your domain name as part of your user name in the format of `domain name\username`. The login must be a user with the Super User role in the ER/Studio Repository to access the Admin functionality in ER/Studio Team Server. The default base user will be Admin > Admin.

LICENSING ER/STUDIO TEAM SERVER

After installing ER/Studio Team Server, you must set up the licensing. ER/Studio Team Server ships with a base admin connection. You do not need to purchase licenses for ER/Studio Enterprise users, their ER/Studio Enterprise license includes ER/Studio Team Server use.

ER/Studio Team Server uses four connection types:

- **Team Server:** The standard connection type that gives Team Server users full functionality to all features.
- **Base:** Admin license that ships with ER/Studio Team Server by default.
- **Portal Concurrent:** Deprecated, user is restricted to Portal functionality.
- **Portal Exclusive:** Deprecated, user is restricted to Portal functionality.

MANAGING LICENSES

Users are managed through ER Studio Security Center. Please see: [Add and Manage Users](#)

The elements of the License Administration page are explained below:

- 1 Displays the license Add-on Status, indicating how many user connections are allowed and the capacity of the license. For details of licensing capacities, please see www.embarcadero.com.
- 2 There are three Actions links:
 - **Refresh:** Updates the licensing module by rereading the license file from the disk.
 - **Register Add-on License:** Opens the registration page and populates the registration code with a unique number that identifies the machine on which ER/Studio Team Server is installed and is generated by the licensing module.
 - **Manage Users:** Opens the user connection administration page where the administrator can allocate licenses to ER/Studio Enterprise users, up to the maximum number shown in the License Add-on Status.
- 3 Lists the users that are currently using the application. This table also shows the remote host id, remote IP address, the date and time when the user logged in, and how long the user has been inactive. The Connection Type column display depends on the license type the user is using for this connection.

The Action column in this section allows the administrator to log off (disconnect) users. The current user cannot disconnect himself.

REGISTERING LICENSES

- 1 Log in to the application as an Administrator.
- 2 On the Dashboard, click **My Settings > Admin** to open the Admin Services page, then click **Licenses**.
- 3 Under Actions, click **Register add-on license** and a **Product Registration** page appears.
- 4 Enter the serial number that you received from your license manager and click **Next**.
- 5 The Registration Code is a number that identifies the machine and is generated by the licensing module.
- 6 On the **Embarcadero Product Registration Login** page, you can login to your existing Developer Network account or create a new account.
 - If you have an existing account enter your login name or e-mail address, your password, and click **Next**.
 - Click **Create Account** if you need a new user account. Fill in the required information and click **Next**.
- 7 Review the Product, Serial Number, and Registration Code information on the Product Registration page and then select either to download or e-mail the activation file.
- 8 If you select **Download**, a File Download dialog opens. Click **Save** and save the file in the appropriate Windows folder: [product install folder]\license, for example
C:\Embarcadero\ER/Studio Team ServerX.X\license.
- 9 If you choose to have the activation file e-mailed to you, you will get an auto-generated message from Embarcadero-licensing. Open the e-mail and save the attached reg*.txt file in the appropriate Windows folder: [product install folder]\license, for example
C:\Embarcadero\ER/Studio Team ServerX.X\license,
before starting the product:.
- 10 Close the **Product Registration Page**.
- 11 Click **Refresh** on the **License Administration** page to update the licensing.

RECOMMENDED NEXT STEPS

Once ER/Studio Team Server is licensed, the next step is to synchronize the repository. Since the synchronization process can be lengthy when working with a large repository we suggest you filter the diagrams that you are most interested in working with immediately.

You may also want to check out the [Common Tasks](#) section that will take you through a few different tasks that will get you up and running, creating, relating and following in no time.

UNINSTALLING ER/STUDIO TEAM SERVER

After you install ER/Studio Team Server, you can remove the application by using the uninstall option in the InstallShield Wizard.

ER/Studio Team Server uninstaller does not uninstall the database. It is the Database Administrator's responsibility to delete the repository solutions and databases if you decide to permanently delete ER/Studio Team Server.

Backing Up License Registration, Diagram Images, and Created Reports

When you uninstall, the uninstaller backs up user-created reports and diagram images. When you reinstall, if you choose to "Connect to existing repository database" on the Reporting Repository wizard page the user-created reports and diagram images are available again.

Also, if the current ER/Studio Team Server has the license registration, you do not have to re-register for the next installation.

CAUTION: This restoration function only works for the files backed up immediately prior to reinstallation.

COMMON TASKS

These short tutorials are designed to give you a quick introduction to some common tasks that you might want to do with ER/Studio Team Server. Please choose a topic to work with and your installation will be up and running in no time.

Please note that these are just a few task examples, there is much more you can do with ER/Studio Team Server, please check our online documentation for details at www.embarcadero.com.

[Connect and Sync with ER Studio](#)

[View/Follow/Relate Objects](#)

[Managing Licenses](#)

[Add and Manage Users](#)

[Add a Glossary](#)

[Import Terms](#)

CONNECT AND SYNC WITH ER STUDIO

Before starting, ER/Studio Team Server works against an installation of ER/Studio Repository. Prior to installing ER/Studio Team Server, you need a working installation of ER/Studio Repository. ER/Studio Team Server supports versions 5.5, 6.0, 6.5 and 6.6 of ER/Studio Repository. We recommend always updating Repository and ER/Studio Data Architect to the most updated version to include any bug fixes and support for the latest features.

As well as the Repository, you will need to have an installation of ER Studio synchronizing with it. A brief outline of how to do this is given below.

To understand the structure required, please read the [Understanding ER/Studio Team Server Infrastructure](#) section.

There are many sample models shipped with ER Studio. If you do not have a current set of working data, you can open one of these from the templates folder.

To connect to the repository from ER Studio open **Repository** from the file menu in ER Studio and click the **Options** menu from the drop-down menu. Enter the required details to log on to your new Team Server installation, then choose **Log In** from the Repository menu.

From the navigation window on the left of the ER Studio interface, select the main model, then choose **Repository > Diagrams > Add Diagram** from the top menu. Another method is to right-click the diagram and choose from the pop-out menu, **Add Diagram**. This will lock the diagram with the Repository server so if you would like to use these templates for other tutorials, you may wish to **File > Save As** a different filename, before adding them.

You should now have a Model synchronized with your Repository server.

To start viewing the data that you have added, you now need to synchronize your Team Server installation to the Repository.

Log in as Admin with the password you specified upon installation. (Default is Admin > Admin)

To synchronize the ER/Studio Team Server Reporting Repository database with the ER/Studio Repository database:

Select **My Settings > Admin > ER/Studio Synchronization**.

In the ER/Studio Synchronization page table, check in the Selection column those resources that you want to synchronize.

Click **Synchronize Selected** to start the synchronization process.

You can now move on to the next section and start working with data!

While you are working with your ER Studio installation, you may wish to [Add and Manage Users](#).

VIEW/FOLLOW/RELATE OBJECTS

If you have not synchronized with ER Studio, you will need to do that first. Instructions are here: [Connect and Sync with ER Studio](#)

You can browse the hierarchy of ER objects from the Model Explorer page.

Log in to ER/Studio Team Server web page and choose **ER Tools** from the top navigation bar, then **Model Explorer** from the left navigation bar.

In this hierarchy, you can expand every ER object to see its content, and you can click any ER object to access its description page, which contains links that you can use to continue browsing your ER objects.

As you hover over certain ER objects, such as diagrams, ER/Studio Team Server displays pop-up windows with detailed information about the ER object. Hovering over the name of an ER object with an eye icon, such as a model or a submodel, displays a miniature picture of the ER object.

ADD AND MANAGE USERS

User ER Studio to add and remove users.

Within the ER Studio program interface, from the Menu Bar, click **Repository > Security > Security Center** from the pop-out menu.

Here you will find how to add and manage Users, Roles and Groups. This gives you many options to allow different Users and Groups, different levels of access to your Repository Projects, Diagrams, and Diagram objects.

[Managing Licenses](#) is done from within the Team Server web interface.

ADD A GLOSSARY

Glossaries are collections of terms, such as "Human Resources", "Accounting", or "Customer Service". Glossaries can contain many terms, and each term can be associated with many glossaries.

Log in to ER/Studio Team Server with your Admin user.

From the top navigation bar, click **Glossaries**. On the top right of the page, click the button **New Glossary**.

In the **New Glossary** dialog box that opens:

Enter a **Name** to identify your new glossary.

Optionally, if you want your new glossary to be a child of an existing glossary:

Write in **Parent Glossary** the name of an existing glossary.

Click **Add** to set the parent.

Define the **Status** of the glossary using nomenclature you decide upon. You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", or "Deprecated".

Write a **Definition** that provides detailed information about the glossary, such as its purpose and audience.

Click **Save** to save your new glossary.

IMPORT TERMS

Creating a term is very much like creating a new glossary as described above. However should you wish to import a large number of Terms, you may wish to take advantage of the Import function.

You can load glossaries and terms from CSV files in to ER/Studio Team Server if you have a CSV file that follows the required format.

To load glossaries and terms from a CSV file:

Select **Glossaries** on the navigation menu.

Click **Load Glossaries** on the upper-right corner of the Glossaries page.

On the **Load CSV File** page that opens:

Click Browse and choose the target CSV file.

Click Load.

ER/Studio Team Server loads the glossaries and terms from the CSV file.

If you do not have a csv file ready, paste the following in to a simple text file and save as a .csv file. For example, Terms.csv.

+++ Terms Begin +++

Key,Name,Status,Definition,Abbreviations,Aliases,AdditionalNotes,Stewards,RelatedGlossaries,RelatedTerms,TermEntityType

,AMT,Approved,"Tax imposed to back up the regular income tax imposed on CORPORATION and individuals to assure that taxpayers with economically measured income exceeding certain thresholds pay at least some income tax.",,,,admin,Accounting,,

,Abatement,Approved,"Complete removal of an amount due, (usually referring to a tax ABATEMENT a penalty abatement or an INTEREST abatement within a governing agency).",,,,admin,Accounting,AMT,

+++ Terms End +++

The process will create the terms and also show an error, because the above example also attempts to relate to the Accounting glossary, which you may not have.

Once you have loaded your Terms in to ER/Studio Team Server, you can start to relate these to Glossaries, other Terms, ER Objects or create discussions on these Terms.

This is just the beginning of your abilities to view, classify, relate and centrally manage authoritative business definitions in a personalized enterprise glossary!

Click on the Terms you have created and have a look at the options.

The screenshot shows the Embarcadero ER/Studio Team Server interface. The top navigation bar includes 'Home', 'Glossaries', 'Terms', 'People', 'ER Objects', 'ER Tools', and 'Data Sources'. The 'Terms' section is active, displaying a list of options: Stream, Description, Discussions, Followers, Related Glossaries, Related Terms, and Related ER Objects. The main content area shows the details for the term 'AMT', which is categorized as 'Business Terms'. It includes a 'Following' button, a 'Delete' link, and a 'Created by admin on Sep 12, 2013' timestamp with an 'Edit' button. The 'Stewards' section lists 'admin'. The 'Name' field contains 'AMT'. The 'Term Entity Type' is 'Business Terms'. The 'Status' is 'Approved'. The 'Definition' is 'Tax imposed to back up the regular income tax imposed on CORPORATION and individuals to assure that taxpayers with economically measured income exceeding certain thresholds pay at least some income tax.' The 'Abbreviations', 'Aliases/Synonyms', and 'Additional Notes' fields are currently empty.