



Product Documentation

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# ER/Studio Team Server XE7

User Guide

Version 4.0.8

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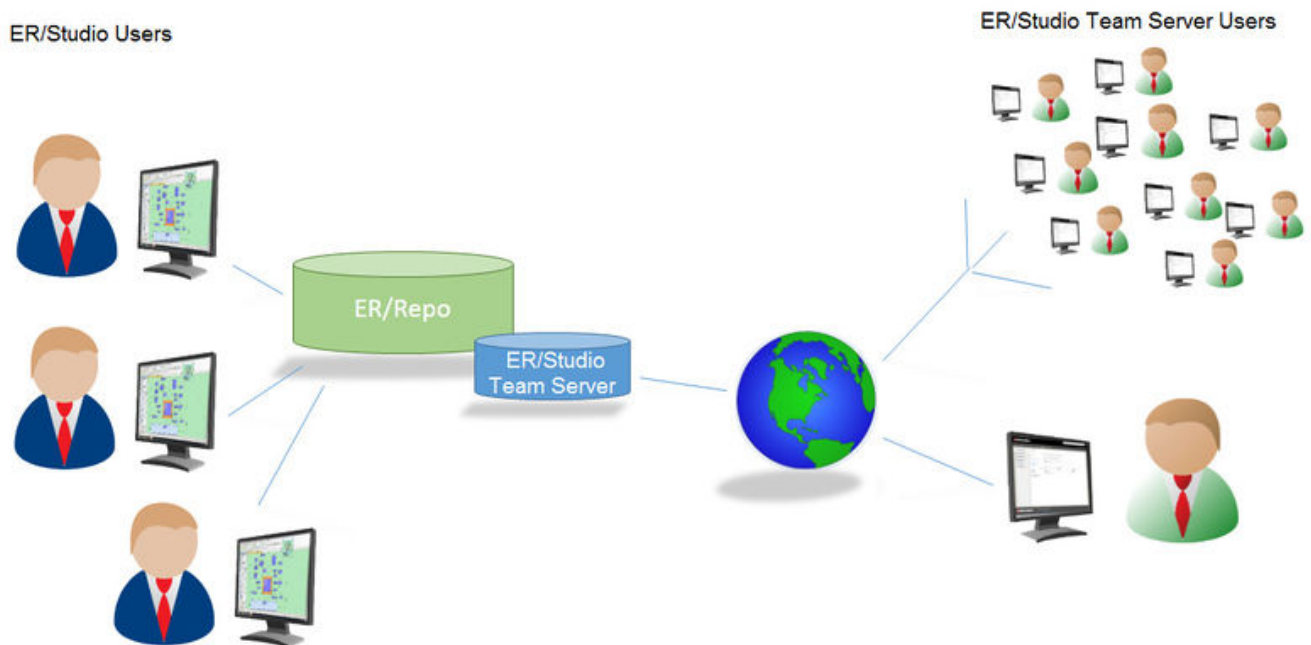
# What Is ER/Studio Team Server

ER/Studio Team Server is a web-based tool to access, search, edit and manage enterprise metadata. It provides access to [metadata from ER/Studio Repository](#), and it allows you to manage additional metadata, such as [glossaries](#) and [terms](#) or [data sources](#).

ER/Studio Team Server allows you to [keep track of your metadata](#) and [discuss its evolution](#) with [other users](#). It also lets you [create reports easily](#) from your data and searches, and export them to different file formats.

ER/Studio Team Server also enables you to:

- o [Search for all kinds of data](#), such as data definitions and [ER objects](#) in any model of your **ER/Studio Repository** database, including **ER/Studio Data Architect** and **ER/Studio Business Architect** diagrams. ER/Studio Team Server has [simple](#) and [advanced](#) searching capabilities to find ER objects and other resources, as well as their reuse and impact analysis.
- o [Browse all the contents](#) of your **ER/Studio Repository** database, such as models and dictionaries, in a structured way.



Using a [web browser](#), you can [access ER/Studio Team Server](#) internally, via your corporate intranet, or externally, via the internet. This way, you can access all the information you need from anywhere.

# Installation Notes for ER/Studio Team Server

These notes provide important information about installing ER/Studio Team Server. You should read this document in its entirety before any [install](#) or [uninstall](#) procedure.

## Minimum Requirements

ER/Studio Team Server is a 32-bit server 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 hardware requirements are:

- CPU: 2 x 3.0 Ghz



**Note:** Should you be running the minimum spec requirements, it is advised to reduce the maxThreads to a single thread. To do this, edit `...tomcat>webapps>api>WEB-INF>ersportal-app.xml` and change the line `<property name="maxThreads" value="2" />`, to have a value of "1" (a restart is required after saving the change).

- RAM: 4 GB
- Disk space: 740 MB for program installation. You will need additional space available for data storage, for example 100mb per diagram in the Repository.

Recommended hardware:

- CPU: 4 x 3.0 Ghz
- RAM: 8 GB

### System Requirements

Your machine must be running the Microsoft Windows operating system. The following versions of Microsoft Windows are supported:

- Microsoft Windows 2012 Server
- Microsoft Windows 2008 R2 Server
- Microsoft Windows 2008 Server (32-bit or 64-bit)
- Microsoft Windows 2003 Server (32-bit only)



**Note:** ER/Studio Team Server can run on Windows XP, Windows Vista and Windows 7-8, but this is not recommended for an operational system, only for testing purposes.

- To install ER/Studio Team Server on Windows 7, you need to run the installer in Windows XP or Windows Vista compatibility mode.
- If the SQL server is also running when installing on Windows 8, the instance needs to be part of the SQL server name. The services and protocols also need to be running or enabled as documented below for [SQL Server 2014](#).

## ER/Studio Repository

**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 6.0, and 6.5 of ER/Studio Repository.

If you have enough RAM for both applications, we recommend that you install ER/Studio Team Server on the same machine where the ER/Studio Repository server is installed. Otherwise, the machine where you install ER/Studio Team Server must have network access (over a local network or over the Internet) to the machine where ER/Studio Repository is running.

## Supported Database Platforms

The **Reporting Repository** is the database that ER/Studio Team Server uses to store the information that it gathers from the **ER/Studio Repository**. The Reporting Repository database also stores the reports from previous queries and the metadata they rely on.

The Reporting Repository database may run on any of the following database platforms:

- Oracle 9i, 10g, and 11g
- IBM DB2 UDB 8.x, 9.x and 10.x Server



**Note:** Before installing ER/Studio Team Server on the DB2 platform, you must first create the Reporting Repository database. Allocate 32K for the tablespace pagesize.

Starting with CONNECT version 3.0.4, Unicode is supported. When installing DB2, UTF-8 should be selected when configuring your DB2 DB.

- Microsoft SQL Server 2005 to 2014

## Important Information

Ensure that the database is set to case-insensitive, as case-sensitive is not supported. Also set the SQL Server Configuration Properties to allow SQL Server authentication. ER/Studio Team Server only supports SQL Server Authentication.

When installing over SQL Server 2014 (any Operating System), use the SQL Server Configuration Manager and make sure that the following services are running:

SQL Server

SQL Server Agent

**Also that following protocols are enabled:**

Shared Memory

TCP/IP

Named Pipes

## Supported Web Browsers

The following web browsers are tested to work with ER/Studio Team Server. Other browsers may work, but are not officially supported:

- Mozilla Firefox
- Google Chrome
- Microsoft Internet Explorer (7.0 or later)

## Conflicts

Do not install ER/Studio Team Server on a system where **ER/Studio Data Architect**, **ER/Studio Business Architect** or a previous version of ER/Studio Team Server is installed. If the ER/Studio Team Server installer detects an installation of any of these applications, the installer asks you to uninstall these applications before you proceed.

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

## Prerequisites

To install ER/Studio Team Server:

- The installation user account must have local administrative privileges.
- The [ER/Studio Repository](#) server and the database server to be used for the ER/Studio Team Server Reporting repository must be running.
- In order to install, you need to create first an empty database for ER/Studio Team Server, unless you already have a database and will be reinitializing it during the install.

## Optional Features

### Active Directory Users Support

The installation must include configuration of LDAP functionality to allow directory service users to log in to ER/Studio Team Server. You can alternatively [enable LDAP authentication after the installation](#).

## Email Support

SMTP server configuration must be done in order to fully support email notifications based on user activity. You can alternatively [enable email support after the installation](#).

## Third-Party Software That Is Installed with ER/Studio Team Server

ER/Studio Team Server depends on some third-party software that the [ER/Studio Team Server installation wizard](#) installs automatically on your system. That third-party includes:

- [Apache Tomcat](#)
- [Pentaho BI Platform](#)

## Installing and Upgrading

If you meet the [minimum requirements](#), you can proceed to install ER/Studio Team Server. See [Installing ER/Studio Team Server](#).

If you have installed a previous version of ER/Studio Team Server (for example, any version of Embarcadero CONNECT or ER/Studio Portal), see [Upgrading ER/Studio Team Server](#).

## After Installing

After the installation is complete, you must [synchronize the ER/Studio Team Server database with the ER/Studio Repository database to ensure that it is up to date](#).

See [Installing ER/Studio Team Server, Next Steps](#) for more information.

## See Also

- [Release Notes for ER/Studio Team Server](#)
- [Upgrading from Previous Versions](#)

# Upgrade Notes for ER/Studio Team Server

These **Upgrade Notes** provide important information regarding the process of upgrading to Embarcadero Team Server 4.0 from a previous versions.

Regardless of the process that you must follow to back up your licenses, which depends on the previous version that you are upgrading from and other factors, after you restore your licenses in your new ER/Studio Team Server 4.0 installation, you must [log in](#) as a [super user](#) and use the [Manage Users](#) page to assign different types of available licenses to your users.



**Note:** Files saved in later versions of ER Studio Data Architect may not work with ER/Studio Team Server if they use new features. For example, if you use SQL Server 2014 for your Physical Model in ER Studio DA 9.7, you will need to update to the corresponding version of ER/Studio Team Server for those files to synchronize.

## Upgrading from Embarcadero CONNECT 3.0.x

If your previous installation is CONNECT 3.0.x, the installation will automatically detect an upgrade to ER/Studio Team Server.

We always recommend backing up your data before starting the process. You may have to back up your database, Repository database and export your [Glossaries](#) and [Terms](#). We also recommend that you back up any licenses. To do this, please follow the steps in [Upgrading from ER/Studio Portal 2.0.x](#).

## Upgrading from ER/Studio Portal 2.0.x

If your previous installation is ER/Studio Portal 2.x, you will need to back up your licenses manually.

Make a copy of the license files, for example: `license.txt`, `ao_12345678.txt` or `.slip` until the upgrade has completed. Then copy to the `license` folder in the installation directory of the new ER/Studio Team Server installation folder.

Depending on your installation location, you can find the license file in the program directory. For example:

- o `C:\Embarcadero\ERStudio Portal 2.0\license`

If you have previously used the uninstaller, you may also have a license backup in the following location:

- o

- 32-bit Windows: [C:\Program Files \(x86\)\Common Files\ersEnterprisePortalBackup\license](#)
- 64-bit Windows: [C:\Program Files\Common Files\ersEnterprisePortalBackup\license](#)
- If you have installed ER/Studio Portal 2.0.x on one computer and now want to install ER/Studio Team Server on a different computer, there is no license to back up, so you must use the license file from the previous installation. Copy the [license\license.txt](#) file from the previous installation folder into the new ER/Studio Team Server installation folder.

After copying over the [license.txt](#) file to the [license](#) folder within the installation folder of ER/Studio Team Server, [log in to ER/Studio Team Server](#) as a [super user](#), select **My Settings > Admin > Licenses** and click **Refresh** for ER/Studio Team Server to recognize your licenses.

## Upgrading from ER/Studio Portal 1.6.x

ER/Studio Portal 1.6.x uses two databases, the solution and the reporting repositories. Because of this, you need to follow these steps to upgrade to ER/Studio Team Server:

1. Consolidate the two databases:
  1. [Stop the Tomcat service](#) and run the 1.6.x [Portal Configuration Manager](#).
  2. Select the **Solution Database** tab.
  3. Change the connection information to match that of the Reporting database.
  4. Select **Initialize Existing Database** and click **Apply**.
  5. Click **OK**. The Solution tables will be placed into the Reporting database.
  6. [Restart the Tomcat service](#).
2. [Log in to the Portal](#) and make sure that everything works correctly.
3. [Uninstall Portal 1.6.x](#).
4. [Install ER/Studio Team Server](#).
5. When prompted to specify the Reporting Database information, specify the connection information, select **Connect to Existing Database**, and click **Next**. You are prompted to specify the Solution database information. It should default to the Reporting database.
6. Specify the password for the Reporting database and click **Next**.
7. Finish the installation.
8. After installing ER/Studio Team Server, [synchronize ER/Studio Team Server with the ER/Studio Repository](#) database to ensure that it is up to date.

# Upgrading ER/Studio Team Server

Before you begin, please review the [Upgrade Notes](#) specific to your previous version and the [Release Notes](#).

To upgrade your ER/Studio Team Server installation to a newer version:

1. Run the installer for ER/Studio Team Server, this will automatically [uninstall](#) your current ER/Studio Team Server installation. If you wish to [uninstall](#) your previous version of ER/Studio Team Server manually, please review, later in this topic, the information regarding keeping your licenses.
2. [Install](#) your new version of ER/Studio Team Server.

## Supported Versions for Upgrading

Upgrading releases of ER/Studio Portal prior to 2.0 is not supported for this release. Please review the [Upgrade Notes](#) for further information.



**Note:** In previous versions of ER/Studio Portal it was possible to split the Reporting and Solutions database in two separate databases. If you have your Portal data in two separate servers, you will need to use your database supporting client tools to merge the data into one database prior to installation. Team Server no longer uses the solution/reporting database structure. Should you have any concerns regarding this, please contact [Support](#) before starting your upgrade.

## Keeping Your Licenses When Upgrading

If you have previously installed ER/Studio Portal 2.x you will need to manually back up your license file as explained below. If you are upgrading from Connect 3.x the Embarcadero Connect installer will automatically back up and use your existing add-on license files. But there are two exceptions:

- o You are upgrading and during the installation you choose a different Reporting repository than the one used in your previous installation. In this case you must copy the [license.txt](#) file from the backup directory to the license directory in the new Embarcadero Connect license directory, [<installation folder>\license\](#) . Depending on the operating system, you can find the license file at one of these backup locations:
  - [C:\Program Files \(x86\)\Common Files\ersEnterprisePortalBackup\license](#)
  - [C:\Program Files\Common Files\ersEnterprisePortalBackup\license](#)
- o You have installed a previous version on one computer and now want to install Embarcadero Connect 3.0 on a different computer. In this case, there is no license to back up so you must use the license file from the previous installation. Copy the [license.txt](#) file from the previous installation to the new installation. The license file resides in [<installation folder>\license\](#) .

After copying over the license file to `<installation folder>\license\`, from the Embarcadero Connect console, go to **Admin** > [Licenses](#), and click **Refresh** so that Embarcadero Connect recognizes and uses the license.

## Reports Update when Upgrading

This section explains how to deal with the upgrade from previous versions when the adhoc report metadata changes with respect to the new version. Changes include adding new model into an adhoc report, or changing field name in the existing adhoc report.



**Note:** The following instructions affect the upgrade from previous versions in which the adhoc report metadata changes with respect to the actual version. For example, the **Connect Model** option is not available until Connect 3.0.2. For this reason, when upgrading from releases prior to Connect 3.0.1 to versions Connect 3.0.2 or higher, you should follow these steps. Particularly, when upgrading from Connect 3.0.2, the **Connect Model** option appears on the **New Report** page but if you move to the next page, the custom attribute options are missing until these steps are executed.

If the adhoc report metadata changes when you upgrade from a previous version, you should follow the following steps after installing the new version:

1. Select **My Settings** > **Admin** > [Repository Management](#).
2. Click **More** button.
3. Click on the options in the following order:
  1. **Refresh Reporting Metadata**.
  2. **Execute Global Action**.
  3. **Refresh System Settings**.
4. Click **Close**.
5. Click **Update Solution Repository** in **My Settings** > **Admin** > [Repository Management](#).
6. Wait until a message of successful update appears.

## After you upgrade ER/Studio Team Server

- [Update the search index](#).

## See Also

- [Installing ER/Studio Team Server](#)
- [Uninstalling ER/Studio Team Server](#)

# User Guide

This volume of help describes how to use ER/Studio Team Server as a [authenticated user](#).

## Topics

- [Connecting to ER/Studio Team Server](#)
- [Searching](#)
- [Working with Resources:](#)
  - [Glossaries](#)
  - [Terms](#)
  - [People](#)
  - [ER Objects](#)
  - [Data Sources](#)
    - [Login Credentials](#)
- [Using Reports](#)
- [User Configuration](#)
- [User Interface](#)

## See Also

- [Overview of the User Interface](#)
- [Administrator Guide](#)

# Connecting to ER/Studio Team Server



To connect to a running instance of ER/Studio Team Server:

1. Open a web browser. See [Supported Web Browsers](#).
2. Browse to the ER/Studio Team Server URL, as provided by your super user. The web browser shows the [ER/Studio Team Server login page](#).
  - **Tip:** If you are the super user, see [Starting ER/Studio Team Server](#) for more information.
3. Enter your **Username** and **Password**, as provided by your super user. The default user being **Admin > Admin**.
4. Optionally, click "Remember me" to store your user credentials in the web browser, so that you do not need to enter them again.
5. Click **Login**.

You should now be logged in to ER/Studio Team Server. If you are unsure of what to do next, the [Start Here Page](#) will guide you.

For further information see the [User Guide](#).

## See Also

- [Troubleshooting, Connecting to ER/Studio Team Server](#)
- [Starting ER/Studio Team Server](#)
- [Login Page](#)

# Overview of User Configuration

You can define your user preferences from the [Preferences](#) page.

If you are a [social user](#), you can customize additional user settings. For example, you can configure your user profile from the [Configure Profile](#) page, or choose in the [Notifications](#) page which activities you want to follow, so that you get email notifications about them.

## Topics



- [Configuring Your User Profile](#)
- [Changing the Default Limit of Filters per Filtering Option](#)
- [Changing the Default Number of Results per Page](#)
- [Changing Your Email Address for Notifications](#)

## See Also

- [Preferences](#) page
- [Configure Profile](#) page
- [Notifications](#) page

# Changing the Default Limit of Filters per Filtering Option

When you [perform an advanced search](#) as a [social user](#) or [any search](#) as a [non-social user](#), the [search results page](#) displays a panel with filtering options.

By default, under each filtering option there is a list of up to 25 filters that you can apply to the current search. If more than 25 filters are available, you need to click , so that it becomes  and the filter limit is ignored.

To change the default limit of filters that are listed under each filtering option, do the following:

1. Select **My Settings** > [Preferences](#).
2. Click **Edit** to make your preferences editable.
3. Under **Search**, change the value of **Default Filter Limitation** to the desired value. The value must be a positive integer.
4. Click **Apply Changes** to save your changes.

## See Also

- o [Search Results](#) page
- o [Preferences](#) page

# Changing the Default Number of Results per Page

The [Comments](#) page displays 10 results per page by default. To change this value:

1. Select **My Settings** > [Preferences](#).
2. Click **Edit** to make your preferences editable.
3. Under **General**, change the value of **Results per Page** to the desired value. The value must be a positive integer.
4. Click **Apply Changes** to save your changes.

## See Also

- o [Search Results](#) page
- o [Preferences](#) page

# Changing Your Email Address for Notifications

To change the email address where you get ER/Studio Team Server notifications:

1. Select **My Settings** > [Preferences](#).
2. Click **Edit** to make your preferences editable.
3. Under **Notifications**, change the value of **Email Address** field to your new email address.
4. Click **Apply Changes** to save your changes.

## See Also

- o [Watching ER Objects for New Comments](#)
- o [Preferences](#) page

# Configuring Your User Profile

When you are a [social user](#), other social users can [search for you](#) and see details about you in your [Description](#) page.

To configure the information in your description page:

1. Open your [person page](#). For example, click your username or user image in your [Home](#) page.
2. Click **Edit** on the upper-right corner of your person page.
3. In the [Configure Profile](#) page:
  1. In **Photo**, click **Browse** and select an image file that you want to represent you in **ER/Studio Team Server**.
  2. Fill **Title** with your job title. This field is mandatory.
  3. You can enter in **First Name** your display name, which **ER/Studio Team Server** displays in places such as the [Stream](#) subpage.
  4. Write a detailed description of your job responsibilities in **Job Description**.
  5. Fill your **Phone** number so other users can contact you by phone.
  6. Fill **Email** with your email address.
  7. Under **Stream Moderation**, you can check or uncheck the following options:
    - "Allow others to post to your stream". Check this option so that other users can post comments associated with your user.
    - "Allow others to comment on activity in your stream". Check this option so that other users can reply to items in your activity stream.
  8. Click **Save Changes** to save your changes.

## See Also

- [Configure Profile](#) page
- [Interacting with People](#)

# Using Social Features



ER/Studio Team Server provides two different user profiles: [social](#) and [non-social](#). The social version of ER/Studio Team Server is a useful system for users to share their experiences with other users and keep track of the activity related to the resources of their interest.

The content of this page focuses on the features that ER/Studio Team Server offers to [social users](#). These features are not available for [non-social users](#). See [Overview of User Experiences](#) to understand the main differences between these two experiences.

## Interface for Social Users

You can access features and settings with the [User Menu](#) of the interface and search for any resource in the [Reporting Repository](#) using the [Global Search Box](#) option. The interface also includes a [Navigation Menu](#) with the main ER/Studio Team Server features. See [Overview of the User Interface](#) for more information about the interface.

## Interaction with Resources



You can interact with any resource ([glossaries](#), [terms](#), [ER objects](#), and [data sources](#)). Interaction includes having [discussions](#) (making comments) with other users about resources, tracking the changes and discussions related to resources and following people activity surrounding resources. For that purpose, you can use the following features:

- o [Stream](#)

The [Stream](#) page shows the activity related to the [current resource](#). This activity involves changes surrounding resources, such as [start following a resource](#), as well as comments related to these changes. The activity stream is shown on the [Home](#) page and on the

[current resource](#) pages. On the [Home](#) page, you can filter the content in the activity stream. See [Stream page](#) for more information.

- o [Discussions](#)

You can see and edit comments related to a resource using the [Discussions Tab](#) of the [navigation sidebar](#). In the [current resource](#) page, you can select the [Discussions](#) option to see the conversation about this resource or [start a new one](#). A [discussion](#) can be expanded to show other users' comments. Each entry displays the image, the username and the actual text of the author and the date when the author wrote the reply. See [Discussing Resources](#) for more information.




**Note:** ER/Studio Team Server shows comments related to an [ER Object](#) made in ER/Studio Data Architect. To view the comments click the icon next to the [ER Object](#) in the [Model Explorer](#).

You can track other users' activity in relation to resources. This activity appears on the [Home](#) page when people that you are following edit resources, post comments to resources, and so on. The [Following a Resource](#) feature provides a practical tool for the personalization of the system according to the user's interests. See [Following a Resource](#) for more information.

## See Also

- o [Overview of User Experiences](#)
- o [Overview of User Roles](#)
- o [Overview of the User Interface](#)
- o [Comment Moderation Page](#)



# Searching

ER/Studio Team Server provides search boxes on several pages, as well as a [global search box](#). To use the [subpage](#) searches, start typing in the search box. As you type, the search results will start to match what you have typed. To use any [global search box](#), just enter your search terms and press .

If you are a [social user](#), using the [global search box](#) you get a combination of the search results that you get when you use the searches for [glossaries](#), [terms](#), [people](#), [ER objects](#), and [data sources](#). If you are a [non-social user](#), the global search box lets you perform a simple search for [ER objects](#).

Both simple and advanced searches are executed against a search index that contains all searchable text properties of the ER objects in the [Reporting Repository database](#). [Super users](#) can [configure the search index](#) so that searches ignore certain fields.

Simple searches check all the searchable properties of any ER object in the [Reporting Repository database](#) for a partial match. After a simple search, ER/Studio Team Server provides a table with the matching ER objects. Each row in the search results provides a link to the [ER object description page](#) of the matching ER object, so that you can view more details on that ER object. At the top of the page you can click one of the letters to filter the search results to only those ER objects beginning with the chosen letter.

If the standard search features are not enough for your use case, you can [use the advanced search feature](#) instead to look to ER objects, which allows you to refine your search with additional parameters and [search string syntax features](#). You can [configure your advanced search results page](#) (click ), and you can save your advanced searches (click ) to access them later from the [Favorite Searches](#) page, where you can email them, print them, and share them.

## See Also

- [Advanced Search](#) page
- [Search Pages](#)
- [Configuring the Search Index](#)

# Using Reports

ER/Studio Team Server provides several standard reports. You can access the standard reports from the [Solution Browser](#) page. See [Shared Reports](#) for a list of available standard reports.

When you execute a standard report, you are prompted to supply custom parameters that filter and format the results of the report. Those parameters depend on each other; that is, the value that you choose for one parameter determines the available values for other parameters. For example, if you select a certain project, you can only select diagrams that exist within the selected project. See [Generating a Shared Report](#) to learn how to use standard reports.

ER/Studio Team Server lets you generate reports not only in HTML, but in PDF and XLS (Microsoft Excel spreadsheet) as well. You can [save reports](#) to run later and share them with other users. You can also print and email the reports.

Using the [Web Adhoc Query and Reporting wizard](#), you can create your own custom reports, and save them into the [Solution Browser](#) page, where you can organize them into folders. You can run your custom reports whenever you want, and you can share them with other users.

The content of the custom reports is limited to the structured business views created using metadata. The metadata module generates SQL code based on business views that you specified during development. You can modify the business views using the [Pentaho Metadata](#) software.

## Topics

- [Generating a Shared Report](#)
- [Adding a Shared Report to Favorite Reports](#)
- [Sending Reports By Email](#)

## See Also

- [My Reports](#)
- [Solution Browser](#)
- [Web Adhoc Query and Reporting Wizard](#)

# Adding a Shared Report to Favorite Reports

You can save the parameters of a shared report in your list of [Favorite Reports](#), so you can later access the report easily.

To make a shared report favorite:

1. Open the [Solution Browser](#) page:
  - As a [social user](#): **ER Tools** > [Shared Reports](#).
  - As a [non-social user](#): [Shared Reports](#).
2. Under **Shared Reports**, click either **Business Reports** or **Technical Reports**.
3. Click the name of the report you want to make favorite. For additional information about the standard reports, see [Shared Reports](#).

**Note:** Users can see all shared reports, regardless of whether or not they have permission to access the ER objects that the report accesses. However, when users that try to run a report that access ER objects which users do not have permission to access, users get an error message instead of the results of the report.

4. On the [Shared Report Configuration Page](#) page that opens:
  1. Choose the parameters for your report.
  2. In the **View as** combo box, choose the desired type of output for the report results: html, pdf or xls.
  3. Click **Add to Favorites**.
2. In the **Add to favorites** dialog that opens:
  1. Enter a **Name** to save the report with in the [Favorite Reports](#) list.
  2. Write a **Description** for the report.
  3. Check the **Shared** checkbox if you want to make the shared report public.
  4. Click **Submit** to make the shared report favorite.

After you save your new report as favorite, you can find it in the [Favorite Reports](#) page. If you are a [non-social user](#), you can find your favorite reports in the [Home](#) page as well.

## See Also

- o [Generating a Shared Report](#)
- o [Favorite Reports](#)
- o [Solution Browser](#)

# Generating a Shared Report

To generate a shared report:

1. Open the [Solution Browser](#) page:
  - As a [social user](#): **ER Tools** > [Shared Reports](#).
  - As a [non-social user](#): [Shared Reports](#).
2. Under **Shared Reports**, click either **Business Reports** or **Technical Reports**.
3. Click the name of the report you want to run. For additional information about the standard reports, see [Shared Reports](#).

**Note:** Users can see all shared reports, regardless of whether or not they have permission to access the ER objects that the report accesses. However, when users that try to run a report that access ER objects which users do not have permission to access, users get an error message instead of the results of the report.

4. On the [Shared Report Configuration Page](#) page that opens:
  1. Choose the parameters for your report.
  2. In the **View as** combo box, choose the desired type of output for the report results: html, pdf or xls.
  3. Click **Run** to generate the target report.

## See Also

- o [Adding a Shared Report to Favorite Reports](#)
- o [Solution Browser](#)
- o [Shared Report Configuration Page](#) page

# Sending Reports By Email

If emailing reports [is enabled](#), follow these steps to send a report by email:

1. Open the [Solution Browser](#) page:
  - As a [social user](#): **ER Tools** > [Shared Reports](#).
  - As a [non-social user](#): [Shared Reports](#).
2. Under **Shared Reports**, click either **Business Reports** or **Technical Reports**.
3. Click the name of the report you want to make favorite. For additional information about the standard reports, see [Shared Reports](#).

**Note:** Users can see all shared reports, regardless of whether or not they have permission to access the ER objects that the report accesses. However, when users that try to run a report that access ER objects which users do not have permission to access, users get an error message instead of the results of the report.

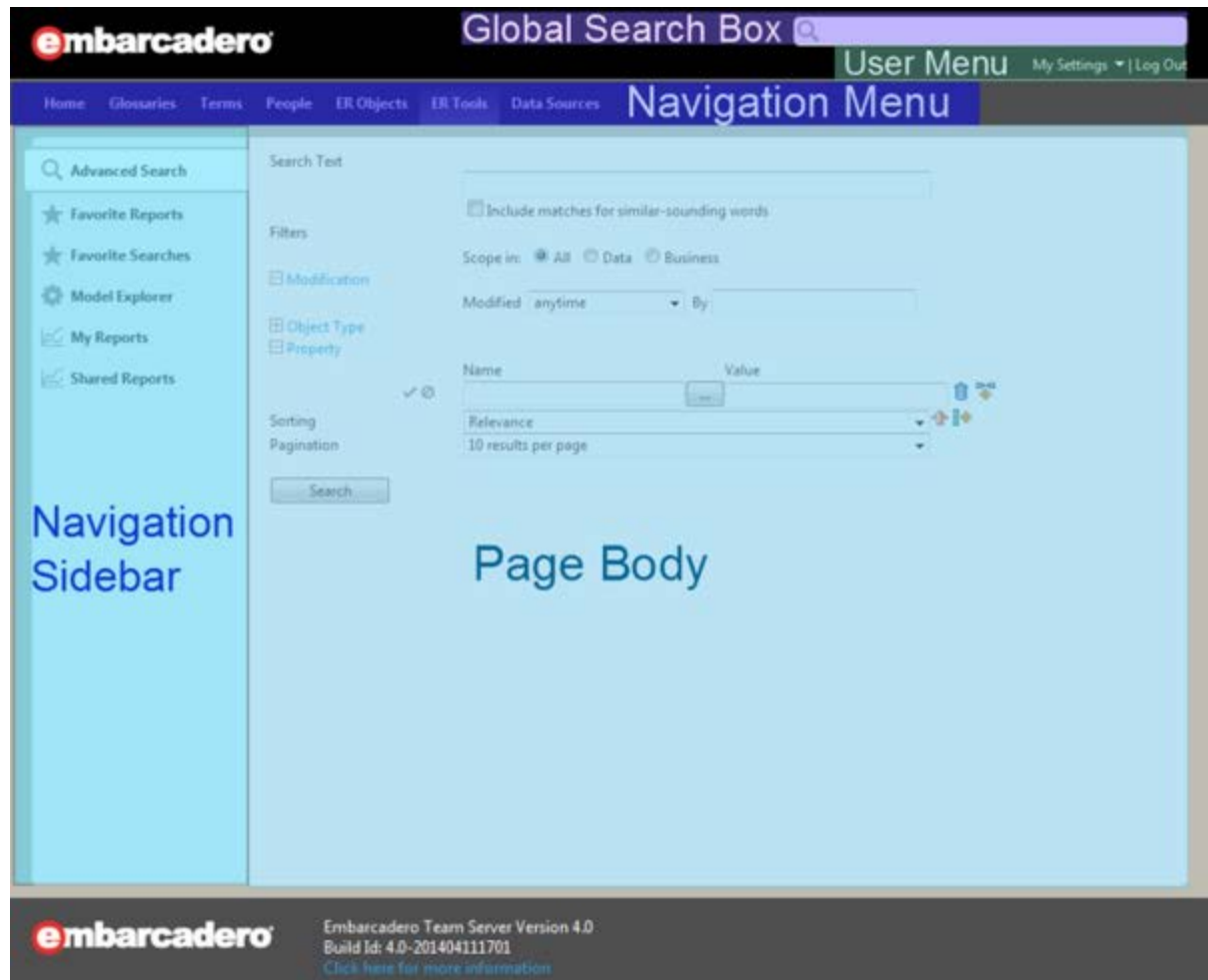
4. On the [Shared Report Configuration Page](#) page that opens:
  1. Choose the parameters for your report.
  2. In the **View as** combo box, choose the desired type of output for the report results: html, pdf or xls.
  3. Click **Send by Email**.
2. In the **Email Report** dialog that opens:
  1. Specify in **To** an email address of the recipient.
  2. Click **Submit** to send the message.

## See Also

- [Generating a Shared Report](#)
- [Adding a Shared Report to Favorite Reports](#)
- [Enabling Emailing Search Results and Reports](#)
- [Favorite Reports](#)

# Overview of the User Interface

The ER/Studio Team Server user interface consists of the following elements:



- [Global Search Box](#). Lets you search for any resource in the [Reporting Repository](#).
- [User Menu](#). Provides access to user features and settings.
- [Navigation Menu](#). Provides access to the main ER/Studio Team Server features.
- **Navigation Sidebar**. Lets you switch between the different pages of a major section. It changes depending on the current section.
- **Page Body**. Shows the content of the current page.

## Page Index

This is a list of pages and types of pages that you can find in ER/Studio Team Server:

- [Login Page](#)

- [Resource Pages](#)
- [Report Pages](#)
- [Search Pages](#)

In the [Navigation Menu](#) we have eight tabs available:

Tab	Description
<a href="#">Home</a>	Your personal home page, including Documentation links, getting started content videos and your Stream page showing your activity and the activity of resources you are following.
<a href="#">Glossaries</a>	Web portal for your Glossaries, list, search, edit.
<a href="#">Terms</a>	The Terms page is a search page that allows you to search for terms or create new terms.
<a href="#">People</a>	The People page is a search page that allows you to search for ER/Studio TS users.
<a href="#">ER Objects</a>	The ER Objects page is a search page that allows you to search for ER objects.
<a href="#">ER Tools</a>	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.
<a href="#">Data Sources</a>	The Data Sources page is a search page that allows you to create or search for data sources or monitor current data sources.
<a href="#">Apps</a>	The Apps page is a search page that allows you to create or search for applications.
<a href="#">Groups</a>	The Groups page is a search page that allows you to create or search for applications.


## See Also

- [User Guide](#)

# Global Search Box



The **Global Search Box** is a search box which is always available in the upper-right corner of the ER/Studio Team Server user interface.

To perform a search, enter your search terms into the search box and press . What happens then depends on your type of user account:

- If you are a [social user](#), ER/Studio Team Server opens a [global search page](#), a search page that includes every kind of [resources](#): [ER objects](#), [people](#), [glossaries](#), and so on.
- If you are a [non-social user](#), ER/Studio Team Server opens the [Simple Search](#) page with the [results](#) for your search. In this case, you can use [special syntax features](#) in your search string.

## See Also

- [Searching](#)
- [Search Pages](#)
- [Simple Search](#) page

# Simple Search

A screenshot of a simple search interface. It features a long, empty text input field on the left. To the right of the input field is a button labeled "Search" in a grey box, and further to the right is a link labeled "Advanced" in blue text.

[Global Search Box](#) | enter a [search string](#) | press  ([non-social users](#))

This page lets you search ER/Studio Team Server for [ER objects](#).

The **Simple Search** page shows the [results of your search](#) at the top of the page, followed by the [simple search form](#).

## See Also

- o [Global Search Box](#)

# Simple Search Form

The simple search form is part of the [Simple Search](#) page.

To perform a search, enter a [search string](#) into the search box and click the **Search** button.

A simple search form consisting of a text input box, a 'Search' button, and a link to 'Advanced' search options.  [Advanced](#)

## See Also

- [Global Search Box](#)
- [Search Results](#)

# Search Results

The search results frame is displayed:




- In the [Advanced Search](#) page, after you [perform an advanced search](#).
- In the [Simple Search](#) page, after you perform a simple search as a [non-social user](#).

The search results for an advanced search have:

- A [header](#), on top, with several options and actions.
- The [results panel](#).
- A [panel with filters](#) to apply to the search results.

## Results Header

Above the search results, you can access the following options and actions:

Item	Description
View as table View as html	Switches the search results view between the HTML view (default) and the table view.
Hide details View details (HTML view)	Hides or shows the details in the search results. If you hide the details, search results provide only show the breadcrumb trail and the relevance. See <a href="#">Results Panel</a> .
 Add to favorites	Opens a window to add the current advanced search to your list of <a href="#">Favorite Searches</a> . See <a href="#">Saving Favorite Searches</a> .
 Send by email	Opens a window to send the current advanced search by email. See <a href="#">Sending Searches By Email</a> .
 Print	Opens a printable version of the current search results, and asks your web browser to print it.
 Configure this view (table view)	Opens the <a href="#">Search Results Configuration</a> page, where you can customize the search results table view.
Order By (HTML view)	<p>Lets you configure the search field to sort the results, and the order, either ascending or descending. By default, most relevant results come first.</p> <p>Click a field name to select it to sort the results. The ascending () or descending () icon is displayed on the right-hand side of the field name. You can click the field again to switch between ascending and descending order.</p> <p><b>Tip:</b> You can further customize the search results using the table view with <b>Configure this view</b>.</p>

## Results Panel

In the results panel, the data matching the search string is marked in **bold**.

While the data displayed is the same, the aspect of the results panel changes depending on the selected type of view: the HTML view or the table view.



When you use the HTML view, each item in the list of results provides the following information:

- In the first row, you can see:
  - An icon that identifies the type of ER object.

- The breadcrumb trail to the ER object, including the ER object itself. For example: Parent ER Object > Matching ER Object. Each ER object in the breadcrumb trail links to its [ER object description page](#).
  - A percentage, between parenthesis, that represents the relevance of the matching ER object, given the search criteria used.
- In the second row, you can see:
    - The date of the last modification to the matching ER object.
    - The author of the last modification to the matching ER object.
  - There are additional rows displaying a variety of property-value pairs. These rows depends on the ER object type of the matching ER object, for each ER object type a different set of rows is displayed.

When you use the table view, ER/Studio Team Server displays the same data, but in columns:

Column	Description
Object Name	The name of the ER object.
Object Type	The type of ER object.
Relevance	The relevance of the matching ER object (in percentage), given the search criteria used.
Modification Date	The date of the last modification to the matching ER object.
User Name	The author of the last modification to the matching ER object.
Path	The breadcrumb trail to the ER object, including the ER object itself. For example: Parent ER Object > Matching ER Object. Each ER object in the breadcrumb trail links to its <a href="#">ER object description page</a> .
Property Type Property Value	Property-value pairs that provide additional information about the ER object. The property-value pairs depend on the ER object type of the matching ER object, for each ER object type a different set of property-value pairs is displayed.



Click a column name to select it to sort the results. The ascending () or descending () icon is displayed on the right-hand side of the column name. You can click the column again to switch between ascending and descending order.



## Filters Panel

The filters panel is displayed on the right-hand side of the [results panel](#) when you use the HTML view, or at the bottom of the [results panel](#) when you use the table view.

In the panel, you can find a variety of filtering options to apply to the search results. Each filtering option has the following appearance:











**Filter By <Filter type>** 



  <Filter name> (<Filter count>)

  <Filter name> (<Filter count>)


...


The following table explains each part of a filtering option in detail:

Item	Description
Filter type	<p>The type of filter. This can be:</p> <ul style="list-style-type: none"> <li>○ <b>Object Type(s)</b>, to filter the search results by the ER object type of the matching ER object.</li> <li>○ An ER object type that one or more matching ER objects have as parent (for example, <b>Diagram(s)</b>), to filter the search results by common parent.</li> </ul>
 /  Hide / Show filters	Click this icon to hide (  ) or show (  ) the filters available in the current filtering option.
 /  Limited / Unlimited filters	<p>Click this icon to switch on or off the limit of filters that can be listed in the current filtering option:</p> <p>: Listed filters are limited.</p> <p>: All filters are listed.</p>
 Make mandatory	Adds the filter on the right-hand side of the icon to the list of active filters, as a mandatory filter. Only search results matching the selected filter are displayed.
 Make excluded	Adds the filter on the right-hand side of the icon to the list of active filters, as an excluded filter. Search results matching the selected filter are not displayed.
Filter name	<p>The name of the filter. The filters depend on the <b>Field type</b>:</p> <ul style="list-style-type: none"> <li>○ If it is <b>Object Type(s)</b>, each filter name is an ER object type (for example, <b>Model</b> or <b>Entity</b>).</li> <li>○ If it is an ER object type, each filter is the name of an actual ER object that is a common parent to one or more ER objects in the search results.</li> </ul>
Filter count	The number of matching ER objects in the search results that match the filter.

When you add a mandatory () or excluded () filter to the list of active filters, ER/Studio Team Server displays the list of active filters after the last filtering option. The list of active filters has the following appearance:








#### Current Active Filter(s)

<Filter mode> <Filter type>: <Filter name> 

<Filter mode> <Filter type>: <Filter name> 

...

The following table explains each part of the list of active filters in detail:

Item	Description
 Remove	You can click the  icon on the left-hand side of <b>Current Active Filter(s)</b> to remove all active filters. Click the  icon to the left-hand side of a specific filter to remove only that filter.
 /  Filter mode	This is an icon representing the filter mode, either mandatory (  ) or excluded (  )
Filter type	The type of filter. For more information, see the table above.
Filter name	The name of the filter. For more information, see the table above.

## See Also

- [Using the Advanced Search of ER Objects](#)

# Search Results Configuration

[Search Results](#) | click 🛠️

The search results configuration page lets you customize the appearance of the table view in the [Search Results](#) page.




This page displays the search results with [editable column headers](#), so that you can remove or reorder the table columns, and a [set of actions](#) to interact with the page.

Each value in the **Property Type** column has a 🚫 icon on the right-hand side. You can click that icon to hide the target property type in the [search results table](#).

Below the table, there is a page navigation menu with page numbers and **Previous** and **Next** buttons that you can use to browse the pages of search results.

## Column Header Actions

Each column header in the search results configuration table provides the following actions:

Item	Description
 Shift column to the left	Switches the current column with the column on its left-hand side.
 Hide column	Hides the current column.
 Shift column to the right	Switches the current column with the column on its right-hand side.

## Search Results Configuration Actions

At the top and at the bottom of the search results configuration page you can access the following actions:

## Search Results Configuration

Item	Description
Apply Changes	Saves your changes to the search results table, and goes back to the <a href="#">Search Results</a> page.
Restore Defaults	Restores the factory defaults, displaying all columns (in the default order) and property types.
Cancel Changes	Goes back to the <a href="#">Search Results</a> page without saving your changes.

## See Also

- o [Advanced Search](#) page

# Resource Pages

While [non-social users](#) can only interact with [ER objects](#), [social users](#) enjoy access to other kind of resources: [glossaries](#), [terms](#), [people](#), and [data sources](#).

The pages of each one of those types of resources have a couple of things in common:



- **Navigation Sidebar.** Allows you to switch between the different subpages of your resource. Different types of resource provide different subpages.
- **Resource Header.** The resource header displays an icon representing the resource, the name of the resource, and some additional information and actions, depending on the type of the resource.
- **Subpage Body.** This area displays the content of the resource subpage selected in the navigation sidebar.

When you open a resource page, the **Description** subpage, common to all resource pages, is opened by default.

## See Also

- [Searching](#)

# Stream

The **Stream** page displays the activity associated with the [current resource](#), such as changes or user comments. This page is only available for [social users](#).

This page contains of the following:

- A [header](#) to write comments to the current resource and search or filter the activity.
- The [activity stream](#), which contains all kinds of activity entries associated with the current resource.
- A [sidebar](#) on the right-hand side, which lists different data depending on the type of the current resource.

## Stream Header

The header of the **Stream** page provides the following fields:


Item	Description
Write a comment	You can write a comment on this field and press <input type="button" value="↵"/> to send it. Users following the current resource can see the comment on their <a href="#">Home</a> page, and reply you.
<n> of <n> filters (only your <a href="#">user</a> and <a href="#">Home</a> pages)	Click this field to expand the list of available filters. Then, you can check or uncheck options to filter in or out content in the activity stream, and click <b>Done</b> to apply the changes. You can click <b>Check all</b> to check all filters, and <b>Uncheck all</b> to uncheck all filters.
Search	Enter text here and press <input type="button" value="↵"/> to filter out in the activity stream any item that does not contain the entered text.

## Stream Activity

The stream activity is a list of activity items.

Each activity items consists of:

- The image of the *author*, the user that performed the activity.
- A description of the activity, with links to the [resource pages](#) of the resources involved in the activity.
- The date and time of the activity.
- A set of actions to interact with the activity item:

Item	Description
Like	Communicate to other users following the current resource that you like or approve of the activity.
Reply	Opens a text box. Write your reply there and press  to send it.
Share	Lets you share the target activity on your <a href="#">person page</a> . When you click <b>Share</b> , a dialog box opens. You can optionally enter a <b>Comment</b> . Click <b>Share</b> to share the activity, or <b>Cancel</b> your action.
Flag	Flags the target activity as inappropriate, and sends it to the <a href="#">super users</a> for review.
Delete (author or <a href="#">super user</a> )	Deletes the target activity.

When you reply to an activity item, ER/Studio Team Server displays your reply right after the target activity item. A reply consists of:

- The image of the author, the user that wrote the reply.
- The name of the author.
- The text that the author wrote as a reply to the target activity item.
- The date and time of the reply.
- If you are the author of the reply, you can click **Delete** to remove your reply. ER/Studio Team Server asks you for confirmation before it deletes your reply.

## Stream Sidebar

The sidebar in the right-hand side of the **Stream** page displays different content depending on the type of resource featured. See [Resource Pages](#).

In general, the sidebar shows a list of activity items somehow related to the current resource.

## See Also

- [Posting a Comment to a Resource](#)
- [Following a Resource](#)
- [Resource Pages](#)

# Discussions

The **Discussions** subpage of [glossary pages](#), [term pages](#), [ER object pages](#), and [data source pages](#) lets [social users](#) discuss any resource of one of those types.

To [start a new discussion](#), click **New Discussion** on the top-right corner.

The list of discussion topic in the page provides the following columns:

Item	Description
Expand/Collapse	You can click the + or - button in this column to expand or collapse a discussion, respectively.
Topic	Title of the discussion.
Started By	User who started the discussion.

When you expand a discussion, you can see the complete text of the first message of the discussion, followed by the replies to the discussions, and then by a text field where you can write your own reply.

Each entry for a reply to the original discussion message displays:

- The image of the author of the reply.
- The username of the author of the reply.
- The actual text of the reply.
- The date when the user wrote the reply.
- If you are the author of the reply, there is a **Delete** button on the right-hand side of the reply date that you can click to delete your reply.

## See Also

- [Discussing Resources](#)
- [Working with Glossaries](#)
- [Working with Terms](#)
- [Working with ER Objects](#)
- [Working with Data Sources](#)

# Followers

The **Followers** subpage of [glossary pages](#), [term pages](#), [person pages](#), [ER object pages](#), and [data source pages](#) lists the [people](#) that is [following the current resource](#).

## See Also

- o [Working with Glossaries](#)
- o [Working with Terms](#)
- o [Interacting with People](#)
- o [Working with ER Objects](#)
- o [Working with Data Sources](#)

# Glossary Pages

Glossary pages provide information about glossaries: activity, details, terms included, discussions about them, people who are following them, and child glossaries. They are only available for [social users](#).

To open a glossary page, follow a glossary link. There are several places where you can find glossary links, but if you are [looking for a specific glossary](#), you can try the [Glossaries](#) search page.

Glossary pages share a [common header](#), and they also share a [common sidebar](#). When you click the items in the sidebar, you get access to information pages about different aspects of the target glossary.

## Glossary Pages Header



The glossary page header shows:








- A glossary icon.
- The name of the glossary.
- The type of resource ("Glossary").
- If you are the owner of the glossary or an [super user](#), you can click **[Delete]** to [delete the glossary](#).

On the top-right corner:

- If you are the owner of the glossary or an [super user](#), you can click **New Term** to [add a new term to the glossary](#).
- You can click **+ Follow** to start following the current glossary, or **Following** to stop following it. See [Following Resources](#).

## Glossary Pages Sidebar

Glossary pages provide a sidebar with the following items:

Item	Description
 <a href="#">Stream</a>	<p>Opens the activity stream of the current glossary.</p> <p>It displays entries, for example, when a term is associated with the current glossary.</p> <p>The sidebar shows:</p> <ul style="list-style-type: none"> <li>○ <b>Followers.</b> A list of users that are following the current glossary. See the <a href="#">Followers</a> subpage.</li> <li>○ <b>Terms.</b> A list of terms associated with the current glossary. See the <a href="#">Terms</a> subpage.</li> <li>○ <b>Children.</b> A list of glossaries that are a child of the current glossary. See the <a href="#">Children</a> subpage.</li> </ul>
 <a href="#">Description</a>	Provides detailed information about the glossary.
 <a href="#">Terms</a>	Shows a list of terms that are associated with the current glossary.
 <a href="#">Discussions</a>	Opens the list of discussions about the current glossary.
 <a href="#">Followers</a>	Shows a list of users that are following the current glossary.
 <a href="#">Children</a>	Shows a list of glossaries that are a child of the current glossary.
 <a href="#">Permissions</a>	Opens the users and groups permissions tab for the glossary.

## See Also

- [Working with Glossaries](#)

# Glossary Description

The **Description** subpage of [glossary pages](#) provides detailed information about a glossary.

The page is divided in two columns:

- o The [details column](#) on the left-hand side.
- o The [stewards column](#) on the right-hand side.

## Details Column

The details column provides the following fields:

Item	Description
<b>Author and Date</b>	On the top of the page, you can see the following text indicating the user who originally created the glossary, and the date when it was created:  Created by <Author> on <Date>
<b>Edit</b>	On the right-hand side of the author and date information, there is an <b>Edit</b> button that you can click to enter the edition mode.  In the edition mode, you can edit the glossary data, and click <b>Save</b> at the bottom of the page to save your changes, or <b>Cancel</b> to revert them.
<b>Name</b>	Name of the glossary.
<b>Parent Glossaries</b>	Parents of the glossary.
<b>Status</b>	Text describing the status of the glossary.
<b>Definition</b>	Detailed description of the glossary.
<b>Abbreviations</b>	List of abbreviations of the glossary.
<b>Aliases/Synonyms</b>	List of aliases and synonyms of the glossary.
<b>Additional Notes</b>	Custom information related to the business object that only you can see. Other users, including <a href="#">super users</a> , cannot see the information in this field.

## Stewards Column

The stewards column provides a list of **Stewards**, users with permission to edit the glossary.

If you are on that list, you can click **Edit** there to add or remove people from the list.

# Children

The **Children** subpage of [glossary pages](#) list the [glossaries](#) that have the current glossary as a parent.

You can use this page to add or remove children of the current glossary.

The page is divided in two tabs:

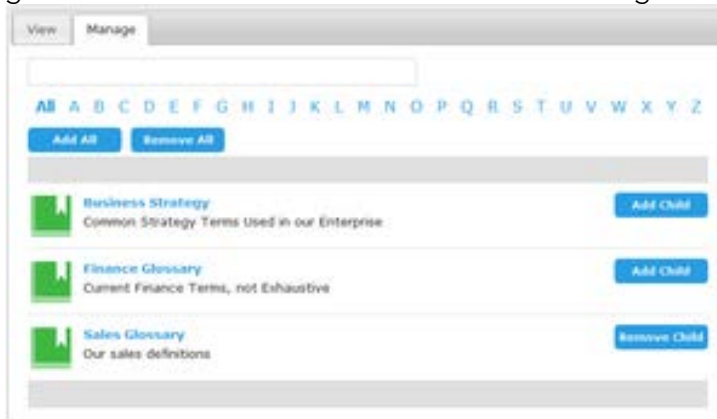
- The View tab displays a list with the glossaries that are a child of the current glossary.
- The [Manage tab](#) lets you add or remove children from the current glossary.

## Manage Tab

The content of the **Manage** tab is similar to the content of the [Glossaries](#) page. For example, it has a search box as well, and letters to navigate the matching glossaries.

On the right-hand side of the glossary entries, you can click **Add Child** to make a glossary a child of the current glossary, or you can click **Remove Child** to remove the target glossary from the list of children of the current glossary.

On the top of the list of glossaries, you can click **Add All** to make all the listed glossaries children of the current glossary, or you can click **Remove All** to remove all the listed glossaries from the list of children of the current glossary.



## See Also

- [Adding a Child to a Glossary](#)

# Term Pages

Term pages provide information about terms: activity, details, discussions about them, people who are following them, and related glossaries, ER objects and other terms. They are only available for [social users](#).

To open a term page, follow a term link. There are several places where you can find term links, but if you are [looking for a specific term](#), you can try the [Terms](#) search page.

Term pages share a [common header](#), and they also share a [common sidebar](#). When you click the items in the sidebar, you get access to information pages about different aspects of the target term.

## Term Pages Header










The term page header shows:

- A term icon.
- The name of the term.
- The type of resource ("Term").
- If you are the owner of the term or a [super user](#), you can click **[Delete]** to [delete the term](#).

On the top-right corner, you can click **+ Follow** to start following the current term, or **Following** to stop following it. See [Following Resources](#).

## Term Pages Sidebar

Term pages provide a sidebar with the following items:

Item	Description
 <a href="#">Stream</a>	<p>Opens the activity stream of the current term.</p> <p>It displays entries, for example, when a term is related to a glossary.</p> <p>The sidebar shows:</p> <ul style="list-style-type: none"> <li>○ <b>Followers.</b> A list of users that are following the current term. See the <a href="#">Followers</a> subpage.</li> <li>○ <b>Related Glossaries.</b> A list of glossaries that are related to the current term. See the <a href="#">Related Glossaries</a> subpage.</li> <li>○ <b>Related Terms.</b> A list of terms related to the current term. See the <a href="#">Related Terms</a> subpage.</li> <li>○ <b>Related ER Objects.</b> A list of ER object related to the current term. See the <a href="#">Related ER Objects</a> subpage.</li> </ul>
 <a href="#">Description</a>	Provides detailed information about the term.
 <a href="#">Discussions</a>	Opens the list of discussions about the current term.
 <a href="#">Followers</a>	Shows a list of users that are following the current term.
 <a href="#">Related Glossaries</a>	Shows a list of <a href="#">glossaries</a> that are related to the current term.
 <a href="#">Related Terms</a>	Shows a list of terms that are related to the current term.
 <a href="#">Related ER Objects</a>	Shows a list of <a href="#">ER Objects</a> that are related to the current term.

## See Also

- [Working with Terms](#)
- [Working with Glossaries](#)
- [Working with ER Objects](#)

# Term Description

The **Description** subpage of [term pages](#) provides detailed information about a term.

The page is divided in two columns:

- o The [details column](#) on the left-hand side.
- o The [stewards column](#) on the right-hand side.

## Details Column

The details column provides the following fields:

Item	Description
<b>Author and Date</b>	On the top of the page, you can see the following text indicating the user who originally created the term, and the date when it was created:  Created by <Author> on <Date>
<b>Edit</b>	On the right-hand side of the author and date information, there is an <b>Edit</b> button that you can click to enter the edition mode.  In the edition mode, you can edit the term data, and click <b>Save</b> at the bottom of the page to save your changes, or <b>Cancel</b> to revert them.
<b>Name</b>	Name of the term.
<b>Status</b>	Text describing the status of the term.
<b>Definition</b>	Detailed description of the term.
<b>Abbreviations</b>	List of abbreviations of the term.
<b>Aliases/Synonyms</b>	List of aliases and synonyms of the term.
<b>Adidtional Notes</b>	Additional information about the business object.

## Stewards Column

The stewards column provides a list of **Stewards**, users with permission to edit the term.

If you are on that list, you can click **Edit** there to add or remove people from the list.

## See Also

- o [Working with Terms](#)

# Related Glossaries

The **Related Glossaries** subpage of [term pages](#) lists the [glossaries](#) related to the term.

If you are a [steward of the term](#), you can use this page to relate or unrelate glossaries to the term. With the exception of [Child Glossaries](#) that are inherited and cannot be unrelated.

The page is divided in two tabs:

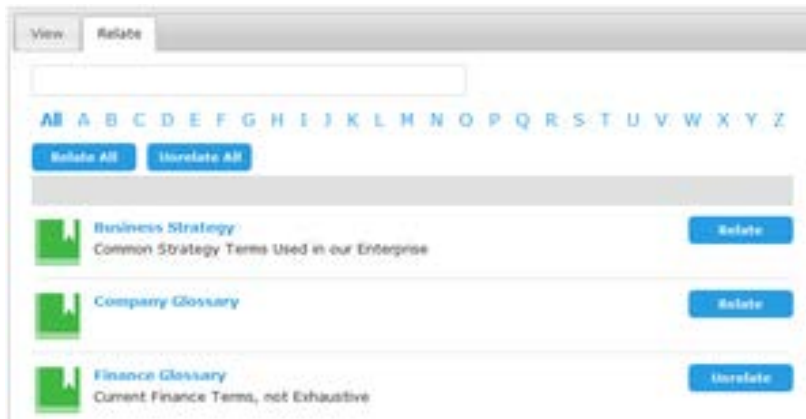
- The View tab displays a list with the glossaries related to the term.
- The [Relate tab](#) lets you relate and unrelate glossaries to the term.

## Relate Tab

The content of the **Relate** tab is similar to the content of the [Glossaries](#) page. For example, it has a search box, and letters to navigate the matching glossaries.

On the right-hand side of the glossary entries, you can click **Relate** to relate a glossary to the term, or you can click **Unrelate** to unrelate the target glossary from the current term.

On the top of the list of glossaries, you can click **Relate All** to relate all the listed glossaries to the current term, or you can click **Unrelate All** to unrelate all the listed glossaries from the current term.



## See Also

- [Associating a Term with a Glossary](#)
- [Terms](#) page
- [Working with Terms](#)
- [Working with Glossaries](#)

# Related Terms

The **Related Terms** subpage (this subpage is called **Terms** in [glossary pages](#)), [term pages](#), and [ER object pages](#) lists the [terms](#) related to/from the current resource.

You can use this page to relate or unrelate terms to the current term.

The page is divided in two tabs:

- The View tab displays a list with the terms related to the current resource.
- In [ER object pages](#) only, the [Match tab](#) lets you match and unmatch terms to the current ER object.
- The [Relate tab](#) lets you relate and unrelate terms to the current resource.

## View Tab

The content of the **View** Tab is a list of related Terms for the resource that you are currently viewing. In ER Objects, there will be all the Terms that are related or matched to the Term. In the Glossary subpage there will be related Terms to the Glossary or to the [Parent Glossary](#).



## Match Tab

The content of the **Match** tab is similar to the content of the [Terms](#) page. For example, it has a search box, and letters to navigate the matching terms.

You can click the **Refresh** button, right below the list of letters, to perform an automatic match against existing terms. ER/Studio Team Server automatically matches any term contained by the current ER object.

On the right-hand side of the term entries, you can click **Unmatch** to unmatch matching terms, or click **Re-Match** to match terms that you manually unmatched.

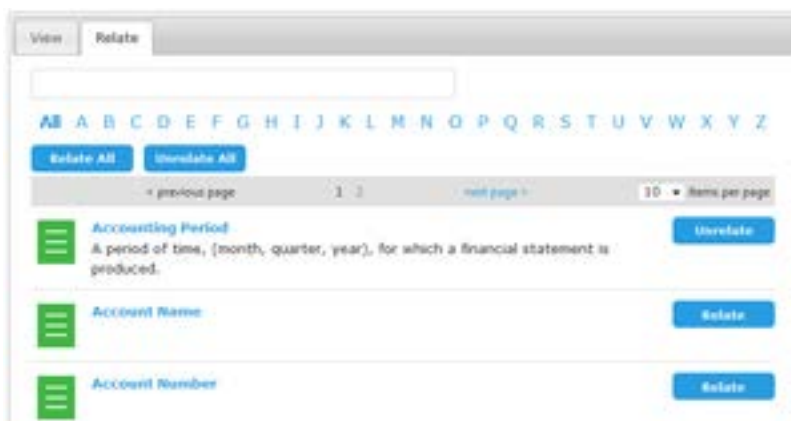
## Relate Tab

The content of the **Relate** tab is similar to the content of the [Terms](#) page. For example, it has a search box, and letters to navigate the matching terms.

On the right-hand side of the term entries, you can click **Relate** to relate a term to the current resource, or you can click **Unrelate** to unrelate the target term from the current resource.

On the top of the list of terms, you can click **Relate All** to relate all the listed terms to the current resource, or you can click **Unrelate All** to unrelate all the listed terms from the current resource.

On the Glossary subpage, any Terms that are listed from a Parent Glossary will also be highlighted with the words (Inherited from *Parent Glossary*). It is not possible to *unrelate* Terms that have been inherited from a Parent Glossary.



## See Also

- [Adding a Term to a Glossary](#)
- [Associating a Term with Another Term](#)
- [Associating an ER Object with a Term](#)
- [Matching an ER Object with Terms](#)

# Related ER Objects

The **Related ER Objects** subpage of [term pages](#) lists the [ER objects](#) that are either [related to the current term](#), or that contain the term in their name or other property values.

You can use the **related ER Objects** page to relate or unrelate and match or unmatch ER objects to the current term.

The page is divided in three tabs:

- o The [View Tab](#).
- o The [Found In tab](#) lets you match and unmatch ER objects to the current term.
- o The [Relate tab](#) lets you relate and unrelate ER objects to the current term.

## View Tab

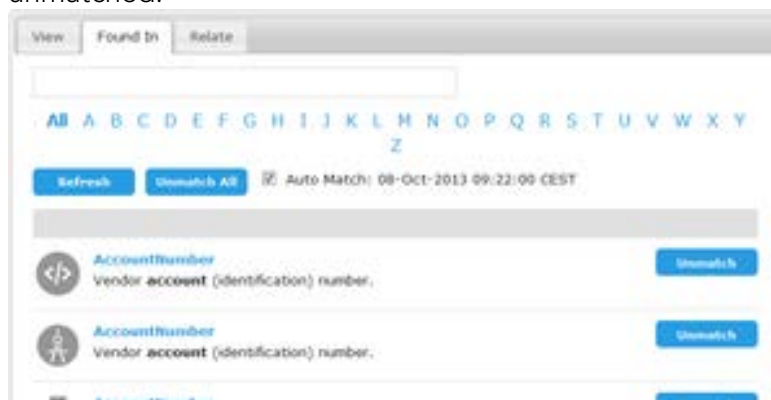
displays a list of related and matching ER objects. The list shows the related ER objects first, and then the matching ER objects.

## Found In Tab

The content of the **Found In** tab is similar to the content of the [ER Objects](#) page. For example, it has a search box as well, and letters to navigate the matching ER objects.

You can click the **Refresh** button, right below the list of letters, to perform an automatic match against existing ER objects. ER/Studio Team Server automatically matches any ER object containing the current term.

On the right-hand side of the ER object entries, you can click **Unmatch** to unmatch matching ER objects, or click **Re-Match** to match ER objects that you manually unmatched.



## Relate Tab

The content of the **Relate** tab is similar to the content of the [ER Objects](#) page as well, and it also has a search box and letters to navigate the matching ER objects.

On the right-hand side of the ER object entries, you can click **Relate** to relate a ER object to the current term, or you can click **Unrelate** to unrelate the target ER object from the current term.

On the top of the list of ER objects, you can click **Relate All** to relate all the listed ER objects to the current term, or you can click **Unrelate All** to unrelate all the listed ER objects from the current term.

## See Also

- [Associating a Term with an ER Object](#)
- [Matching a Term with ER Objects](#)

# Person Pages

Person pages provide information about users: activity, personal data, people they are following, people who are following them, and more. They are only available for [social users](#).

To open a person page, follow a user link. There are several places where you can find user links, but if you are looking for a specific user, you can try the [People](#) search page.

Person pages share a [common header](#), and they also share a [common sidebar](#). When you click the items in the sidebar, you get access to information pages about different aspects of the target user.

## Person Pages Header



The person page header shows:





- An image of the user. A default image is shown if the user does not upload an image.
- The name of the user (not the username).
- The job title of the user.

On the top-right corner:

- If you are viewing your own person page, you can click **Edit** to open the [Configure Profile](#) page.
- Otherwise, you can click **+ Follow** to start following the current user, or **Following** to stop following. See [Following Resources](#).

## Person Pages Sidebar

Person pages provide a sidebar with the following items:

Item	Description
 <a href="#">Stream</a>	Opens the activity stream of the current user. It displays entries, for example, when the current user comments on a model metadata, glossary terms, and domain pages.
 <a href="#">Description</a>	Provides detailed information about the user.
 <a href="#">Followers</a>	Shows a list of users that are following the current user.
 <a href="#">Following</a>	Shows a list of users that the current user is following.

## See Also

- [Interacting with People](#)


# Configure Profile

[Home](#) | click your name or image | **Edit** ([social users](#))

From the **Configure Profile** page you can configure your user profile to share some of your personal data with other ER/Studio Team Server [social users](#).

You can edit any of the following fields and click **Save Changes** at the bottom of the page to save your changes.

Photo



**Browse** No file selected.

Select a JPG, PNG or GIF image from your computer. The maximum file size is 4MB.

**Upload**

Title

Your title will appear below your photo on profile page

First Name

(required)

Entering a display name will replace your first name anywhere your name appears in the system

Job Description

Enter a brief description of your job responsibilities

Phone

Email

(required)

(ex. user@example.com)

Stream Moderation

☒ Allow others to post to your stream

☒ Allow others to comment on activity in your stream

**Save Changes**

## Configure Profile

Item	Description
Photo	<p>Click <b>Browse</b> to open a file manager dialog where you can select a local image file. After you select an image file, click <b>Upload</b> to upload the image to ER/Studio Team Server and use it as your user image.</p> <p><b>Note:</b> Under the <b>Browse</b> button there is a description of the format and size limitations that ER/Studio Team Server enforces on user images. If your image does not fit those limitations, uploading your image fails.</p>
Title	Your job title. For example, "Quality Assurance Engineer" or "Technical Writer".
First Name	Your first name. For example, "Jane" or "John".
Job Description	A brief description of your job responsibilities.
Phone	Your phone number.
Email	Your email address.
Stream Moderation	<p>You can toggle the following options:</p> <ul style="list-style-type: none"><li>o "Allow others to post to your stream". Check this option so that other users can post comments associated with your user.</li><li>o "Allow others to comment on activity in your stream". Check this option so that other users can reply to items in your activity stream.</li></ul>

## See Also

- o [Configuring Your User Profile](#)
- o [Stream](#)

# Following



The **Following** subpage of [person pages](#) lists the resources ([glossaries](#), [terms](#), [people](#), [ER objects](#), [data sources](#)) that the user is [following](#).

## See Also

- o [Interacting with People](#)

# User Description

**Title**

Jane Doe

**Name**

Jane admin

**Job Description**

Web service administrator

**Phone**

555-2106

**Email**

admin@local.com

The **Description** subpage of [person pages](#) provides detailed information about a user.

The page provides the following fields:

Item	Description
Title	User display name. ER/Studio Team Server displays the user display name in the header of <a href="#">person pages</a> , below the user name.
Name	First and last names of the user.
Job Description	Detailed description of the user's job.
Phone	Telephone number where you can reach the user.
Email	Email address of the user.

## See Also

- [Interacting with People](#)

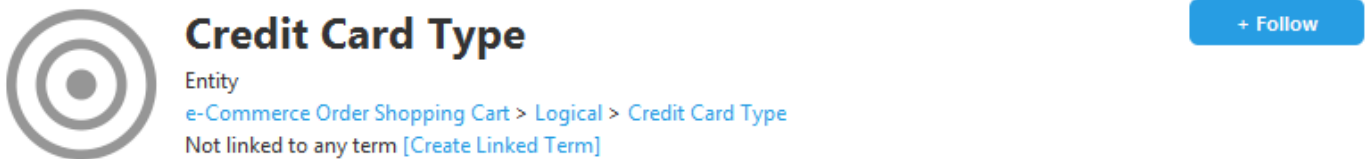
# ER Object Pages

ER Object pages provide detailed information about specific ER objects, in addition to links to related ER objects. You can follow those links to [browse](#) the [Reporting Repository](#).

You can access ER object pages by [browsing](#) and [searching](#) ER/Studio Team Server.

ER Object pages share a [common header](#), and they also share a [common sidebar](#). When you click the items in the sidebar, you get access to information pages about various aspects of the target ER object.



## ER Object Pages Header



The ER object page header shows:

- An image representing the ER object. A default image is shown if the ER object cannot be represented by an image.
- The name of the ER object.
- The type of the ER object.
- Breadcrumbs with the ER objects that are above the current ER object in the ER object hierarchy. Here you can click the parents of the current ER object to access their ER object pages.
- The [Linked Term](#) reference or option to create a Linked Term.

On the top-right corner:









- If you are a [social user](#), you can click **+ Follow** to start following the current ER object, or **Following** to stop following it. See [Following Resources](#).
- If you are a [non-social user](#), you can click  to start watching the current ER object for updates, or  to stop watching it. See [Watching ER Objects for New Comments](#).

## ER Object Pages Sidebar

The sidebar in ER object pages provides different items depending on your user type: [social](#) or [non-social](#).

## Sidebar for Social Users

When you are a [social user](#), ER object pages provide a sidebar with the following items, depending on the ER object type:

Item	Description
 <a href="#">Stream</a>	Opens the activity stream of the current ER object.
 <a href="#">Description</a>	Provides detailed information about the ER object, with links to related ER objects. This page looks different depending on the type of the current ER object.
 <a href="#">Discussions</a>	Opens the list of discussions about the current ER object.
 <a href="#">Followers</a>	Shows a list of users that are following the current ER object.
 <a href="#">Related Terms</a>	Shows a list of terms that are associated with the current ER object.
 <a href="#">Related Data Sources</a>	Shows a list of data sources that are associated with the current ER object.
 <a href="#">Alerts</a> (only <a href="#">security properties</a> and <a href="#">attachments</a> )	Lets you <a href="#">configure conditions that raise alerts about sensitive data</a> .
 <a href="#">Permissions</a>	Opens the users and groups permissions tab for the current diagram, model or submodel.

**Note:** The **Stream**, **Discussions**, and **Followers** entries in the sidebar of an ER object page are disabled until you perform some social interaction with the target ER object. To enable them you can, for example, [start following the target ER object](#).

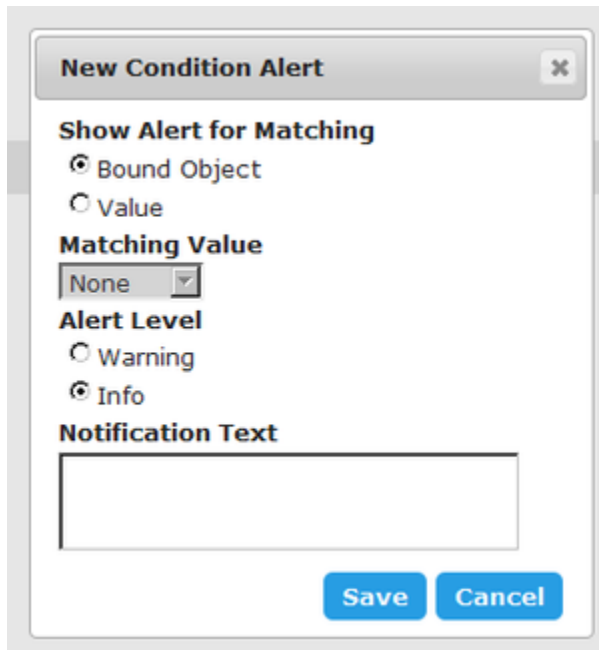
## Sidebar for Non-Social Users

When you are a [non-social user](#), ER object pages provide a sidebar with a single item: [Description](#).

## See Also

- [Working with ER Objects](#)

# Alerts



The image shows a 'New Condition Alert' dialog box. It has a title bar with a close button. The main content area contains the following sections:

- Show Alert for Matching:** Two radio buttons, 'Bound Object' (selected) and 'Value'.
- Matching Value:** A dropdown menu currently showing 'None'.
- Alert Level:** Two radio buttons, 'Warning' and 'Info' (selected).
- Notification Text:** A large empty text area for entering a message.

At the bottom right, there are two buttons: 'Save' and 'Cancel'.

Alerts subpage provides detailed information about the conditions alerts that a [Security Property](#) or an [Attachment](#) has. If an alert condition matches an ER object, **ER/Studio Team Server** displays on the header of an [ER object page](#), the alert message and icon defined in the alert condition.

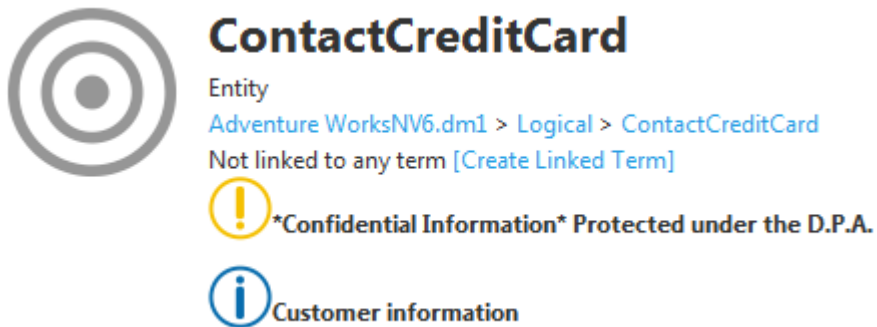
You can access the Alerts subpage by clicking the Alerts Icon at the common sidebar from a Security Property or Attachment page.

This page provides an action on top, **New Condition**. You can click this action to add a new [alert condition entry](#) to the page.

[Super users](#) can edit and delete any alert condition, however [authenticated users](#) can only edit and delete those alert conditions that they create.

## Alert Condition Entries

Each alert condition entry in the page provides the following fields:

Item	Description
Show Alert for Matching	<p>Here you can define the condition that should result in showing the target alert on any matching ER object. You may choose any of the following values:</p> <ul style="list-style-type: none"> <li>○ <b>Bound Object.</b> Show the target alert for any object bound to the current security property or attachment.</li> <li>○ <b>Value.</b> Show the target alert for any object bound to the current security property or attachment where the security property or attachment has the specified value. You can specify the target value on the text input field on the right-hand side of <b>Value</b>.</li> </ul>
Alert Level	<p>The level of the alert, which determines which icons <b>ER/Studio Team Server</b> displays along with the defined <b>Notification Text</b>. You may choose any of the following values:</p> <ul style="list-style-type: none"> <li>○ <b>Info.</b></li> <li>○ <b>Notice.</b></li> </ul> <p>The following image shows the header of an ER object with one alert of each type and a <b>Notification Text</b> equal to the name of the chosen <b>Alert Level</b>.</p>  <p>The screenshot shows the header for the 'ContactCreditCard' entity. It includes a target icon (concentric circles), the entity name 'ContactCreditCard', its path 'Adventure WorksNV6.dm1 &gt; Logical &gt; ContactCreditCard', and a note 'Not linked to any term [Create Linked Term]'. Below this, two alert icons are shown: a yellow exclamation mark for 'Notice' with the text '*Confidential Information* Protected under the D.P.A.' and a blue 'i' in a circle for 'Info' with the text 'Customer information'.</p>
Notification Text	<p>Text of the alert.</p> <p><b>ER/Studio Team Server</b> displays this text on the header of matching ER objects, on the right-hand side of the icon representing the <b>Alert Level</b>.</p>
Delete Condition (only <a href="#">super users</a> and alert condition author)	Deletes the target condition.

**Note:**ER/Studio Team Server saves changes to field values as fields lose focus.

# ER Object Description

The **Description** subpage of [ER object pages](#) provides detailed information about an ER object.

The content of the page varies from one ER object type to another. However, when you are a [non-social user](#), all of them provide the following two sections at the end of the page:

Item	Description
<b>Labels</b>	Lets you view and manage the current ER object labels.
<b>Comments</b>	Lets you view the comments to the current ER object. You can add, edit or delete your own comments, or any comment if you are an <a href="#">super user</a> .

This is a list of available ER object description pages:

- ER Object description pages for **ER/Studio Data Architect** object types:
  - [Attachment](#)
  - [Attachment Type](#)
  - [Attribute/Column](#)
  - [Bound Attachment](#)
  - [Bound Data Movement Rule](#)
  - [Bound Security](#)
  - [Data Lineage Column](#)
  - [Data Lineage Source/Target](#)
  - [Data Lineage Table](#)
  - [Data Movement Rule](#)
  - [Default](#)
  - [Diagram](#)
  - [Dictionary](#)
  - [DL Transformation](#)
  - [Domain](#)
  - [Entity/Table](#)
  - [Key/Index](#)
  - [Lineage Data Flow](#)

- [Lineage Data Stream](#)
- [Model](#)
- [Reference Value](#)
- [Relationship](#)
- [Security Property](#)
- [Security Type](#)
- [Submodel](#)
- [User Datatype](#)
- [View](#)
- [View Column](#)
- ER Object description pages for **ER/Studio Business Architect** object types:
  - [BM Annotation](#)
  - [BM Assignment](#)
  - [BM Association](#)
  - [BM BusinessAttribute](#)
  - [BM BusinessElement](#)
  - [BM BusinessEntity](#)
  - [BM BusinessUnit](#)
  - [BM DataElement](#)
  - [BM DataObject](#)
  - [BM DataSource](#)
  - [BM DataStore](#)
  - [BM Diagram](#)
  - [BM Domain](#)
  - [BM Event](#)
  - [BM Gateway](#)
  - [BM Group](#)
  - [BM Lane](#)
  - [BM Link](#)

- [BM Model](#)
- [BM Message Flow](#)
- [BM PDiagram](#)
- [BM Pool](#)
- [BM Process](#)
- [BM Project](#)
- [BM Property](#)
- [BM PProperty](#)
- [BM ReferenceColumn](#)
- [BM ReferenceEntity](#)
- [BM Relationship](#)
- [BM Rule](#)
- [BM Sequence Flow](#)
- [BM Steward](#)
- [BM SubjectArea](#)
- [BM Task](#)
- [BM Trigger](#)
- [BM Usage](#)
- [BM Workspace](#)

## See Also

- [Working with ER Objects](#)

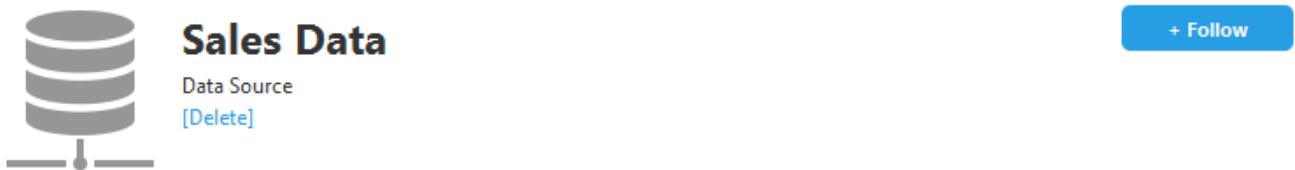
# Data Source Pages

Data source pages provide information about data sources: activity, details, discussions about them, people who are following them, and related ER models. They are only available for [social users](#).

To open a data source page, follow a data source link. There are several places where you can find data source links, but if you are [looking for a specific data source](#), you can try the [Data Sources](#) search page.

Data source pages share a [common header](#), and they also share a [common sidebar](#). When you click the items in the sidebar, you get access to information pages about different aspects of the target data source.

## Data Source Pages Header



The data source page header shows:

- A data source icon.
- The name of the data source.
- The type of resource ("Data Source").
- If you are the owner of the data source or a [super user](#), you can click **[Delete]** to [delete the data source](#).








On the upper-right corner, you can click **+ Follow** to start following the current data source, or **Following** to stop following it. See [Following Resources](#).

## Data Source Pages Sidebar

Data source pages provide a sidebar with the following items:



**Note:** Related ER Models is available if there is an **ER/Studio Team Server** License registered. Related Login Credentials and Monitoring are available if there is a **DBArtisan Team Server** License registered

Item	Description
 <a href="#">Stream</a>	<p>Opens the activity stream of the current data source.</p> <p>Displays entries, for example, when a data source is related to an ER model.</p> <p>The sidebar shows:</p> <ul style="list-style-type: none"> <li>○ <b>Followers.</b> A list of users that are following the current data source. See the <a href="#">Followers</a> subpage.</li> </ul>
 <a href="#">Description</a>	Provides detailed information about the data source.
 <a href="#">Discussions</a>	Opens the list of discussions about the current data source.
 <a href="#">Followers</a>	Shows a list of users that are following the current data source.
 <a href="#">Related ER Models</a>	Shows a list of ER models that are related to the current data source.
 <a href="#">Related Login Credentials</a>	Shows a list of Login Credentials that are related to the current data source.
 <a href="#">Permissions</a>	Opens the users and groups permissions tab for the data source.

## See Also

- [Working with Data Sources](#)

# Data Source Description

The **Description** subpage of [data source pages](#) provides detailed information about a data source.

The page is divided in two columns:

- The [details column](#) on the left-hand side.
- The [stewards column](#) on the right-hand side.

Created by [admin](#) on nov 18, 2013, last edited by [admin](#) on oct 10, 2014 [Edit](#) Stewards [\[Add\]](#)  
[admin](#)

### Detail

---

**Name**  
Sales Data

**Definition**

**Production Level**

**Location**

**Application affinity**

**Status**

**Abbreviations**

**Aliases/Synonyms**

**Additional Notes**

### Connection Properties

---

**Type**  
SQL Server

**Host Name**  
ETESVMS00

**Port**  
0

**Default Database**

**Protocol**  
Alias

**Encryption**  
false

**Packet Size**  
0

**Windows Authentication**  
true

**Custom Properties**

Property Name	Property Value
---------------	----------------

○

## Details Column

The details column provides the following fields:

## Data Source Description

Item	Description
Author and Date	On the top of the page, you can see the following text indicating the user who originally created the term, and the date when it was created:  Created by <Author> on <Date>
Edit	On the right-hand side of the author and date information, there is an <b>Edit</b> button that you can click to enter the edition mode. In the edition mode, you can edit the term data, and click <b>Save</b> at the bottom of the page to save your changes, or <b>Cancel</b> to revert them.
Name	Name of the data source.
Definition	Detailed description of the data source.
Production Level	Production Level of the data source.
Location	Location of the data source.
Application Affinity	Application Affinity of the data source.
Status	Status of the data source.
Abbreviations	List of abbreviations of the data source.
Aliases/Synonyms	List of aliases and synonyms of the data source.
Additional Notes	Custom information related to the data source that only you can see. Other users, including <a href="#">super users</a> , cannot see the information in this field.
Type	Type of database management system (DBMS) of the data source. The following DBMS are supported: DB2 LUW, DB2 z/OS, InterBase, Firebird, JDBC, MySQL, ODBC, Oracle, SQL Azure, SQL Server, Sybase, Sybase IQ.
<Database Management System Fields>	Depending on the <b>Type</b> of data source, ER/Studio Team Server displays a different set of fields between the <b>Type</b> and the <b>Custom Properties</b> fields. See <a href="#">Data Source Fields for a Specific Database Management System</a> .
Custom Properties	Custom properties of the data source. For each property you can see a property name and an associated property value.

## Stewards Column

The stewards column provides a list of **Stewards**, users with permission to edit the data source.

If you are on that list, you can click **Edit** there to add or remove people from the list.

## See Also

- [Working with Data Sources](#)
- [Data Source Fields for a Specific Database Management System](#)

# Related ER Models



The **Related ER Models** subpage of [Data Sources](#) lists the [ER Models](#) that are either [related to the current Data Source](#), or that can be related to the [Data Source](#).

You can use the **Related ER Models** page to relate or unrelate ER Models to the current Data Source.

The page is divided in two tabs:

## View Tab

The [View Tab](#) displays a list of related ER Models. The list shows the ER Models currently related to the selected Data Source. From here you can relate and unrelate ER Models to the current Data Source.



## Relate Tab

The [Relate Tab](#) allows you to relate and unrelate ER Models to the current Data Source.

The **Relate** tab contains a list of Data Models that can be related to the Data Source. The list is arranged with alphabetical navigation and contains a search box.

On the right side of the ER object entries, you can click **Relate** to relate a ER object to the current Data Source, or you can click **Unrelate** to unrelate the target ER Model from the current Data Source.

## See Also

- o [Data Source Pages](#)
- o [ER Objects](#)
- o [Working with Data Sources](#)

# Related Login Credentials



The **Related Login Credentials** subpage of [Data Sources](#) lists the [Login Credentials](#) that are either related to the current Data Source, or that can be related to the [Data Source](#).

You can use the **Related Login Credentials** page to relate or unrelate Login Credentials to the current Data Source.

The page is divided in two tabs:

## View Tab

The [View Tab](#) displays a list of related Login Credentials. The list shows the Login Credentials currently related to the selected Data Source. From here you can **test connection** to the current Data Source with each related Login Credential .



## Relate Tab

The [Relate Tab](#) allows you to relate and unrelate Login Credentials to the current Data Source.

The **Relate** tab contains a list of Login Credentials that can be related to the Data Source. The list is arranged with alphabetical navigation and contains a search box.

On the right side of the Login Credentials entries, you can click **Relate** to relate a Login Credential to the current Data Source, or you can click **Unrelate** to unrelate the target Login Credential from the current Data Source.

## See Also

- [Data Source Pages](#)

# App Pages

App pages provide information about apps: activity, details, server code, discussions about them, people who are following them and permissions. They are only available for [social users](#).

To open an app page, follow a app link. There are several places where you can find app links, but if you are [looking for a specific app](#), you can try the [Apps](#) search page.

App pages share a [common header](#), and they also share a [common sidebar](#). When you click the items in the sidebar, you get access to information pages about different aspects of the target application.

## App Pages Header



The app page header shows:







- A app icon.
- The name of the app.
- The type of resource ("App").
- If you are the owner of the application or an [super user](#), you can click **[Delete]** to [delete the app](#).

On the top-right corner:

- You can click **+ Follow** to start following the current app, or **Following** to stop following it. See [Following Resources](#).

## App Pages Sidebar

App pages provide a sidebar with the following items:

Item	Description
 <a href="#">Stream</a>	Opens the activity stream of the current app. It displays entries, for example, like who created the application. The sidebar shows the <b>Followers</b> . A list of users that are following the current application. See the <a href="#">Followers</a> subpage.
 <a href="#">Description</a>	Provides detailed information about the app.
 <a href="#">Server Code</a>	Shows the page where you can develop and test your application.
 <a href="#">Discussions</a>	Opens the list of discussions about the current application.
 <a href="#">Followers</a>	Shows a list of users that are following the current app.
 <a href="#">Permissions</a>	Opens the users and groups permissions tab for the application.

## See Also

- [Server Code Examples](#)

# App Description

The **Description** subpage of [app pages](#) provides detailed information about an application.

The page is divided in two columns:

- o The [details column](#) on the left-hand side.
- o The [stewards column](#) on the right-hand side.

## Details Column

The details column provides the following fields:

Item	Description
<b>Author and Date</b>	On the top of the page, you can see the following text indicating the user who originally created the app, and the date when it was created:  Created by <Author> on <Date>
<b>Edit</b>	On the right-hand side of the author and date information, there is an <b>Edit</b> button that you can click to enter the edition mode.  In the edition mode, you can edit the app data, and click <b>Save</b> at the bottom of the page to save your changes, or <b>Cancel</b> to revert them.
<b>Name</b>	Name of the application.
<b>Status</b>	Text describing the status of the app.
<b>Definition</b>	Detailed description of the app.
<b>Abbreviations</b>	List of abbreviations of the application.
<b>Aliases/Synonyms</b>	List of aliases and synonyms of the app.
<b>Additional Notes</b>	Additional information about the app.

## Stewards Column

The stewards column provides a list of **Stewards**, users with permission to edit the data source.

If you are on that list, you can click **Edit** there to add or remove people from the list.

## See Also

- o [Working with Apps](#)

# Server Code

The Server Code menu on the Apps page is where you add the script files to run in your app.

## To create a new Server Code:

1. Click the **New File** button.
2. In the **New File** window that appears, choose a name for your Server Code File and click **Save**.
3. Highlight the New File you have created by clicking the name of your new file.
4. To save any script that you enter in to the Server Code window, choose the **Save** button.

The following script is a function to add the Steward of your choosing to all terms.

```
function addStewardToAllTerms(stewardId) {
var added = 0;
var error = 0;
var already = 0;
var terms = TeamServer.terms.list();
for ( var i=0; i<terms.size(); i++ ) {
var term = terms.get(i);
if ( term.stewards.get(stewardId) === null ) {
var result = term.stewards.add(stewardId);
if (result.result == "OK") {
added++;
}
else {
error++;
println(result.message);
}
}
else {
already++;
}
}
println( "Add steward " + stewardId + " to all terms: added " + added + ",
already steward " + already + ", errors " + error);
}
addStewardToAllTerms("11");
```

It is possible to copy and paste this script in to your server code window. Changing the final line to instruct the function to work with your required steward. The example above uses '11', you may wish to change this to `addStewardToAllTerms("1");` for Admin.

## See Also


- o [Server Code Examples](#)

# Server Code Examples

Creating your own apps within ER/Studio Team Server allows you to add functions that are specific to your needs.

You can work with:

- o Glossaries
- o Stewards of Glossaries or Terms
- o Terms
- o Relationships of Terms and Glossaries

-  **Note:** For example `TeamServer.terms.get(123).terms.list()` returns a list of all of the terms related with the term of ID=123

## Delete All Terms

```
function deleteTerms() {
    var terms = TeamServer.terms.list();
    var count = 0;
    for (var i=0; i<terms.size(); i++) {
        var term = terms.get(i)
        TeamServer.terms.destroy(term.id)
        count++;
    }
    println(count + " terms deleted");
}

deleteTerms();
```

## Add Steward to All Terms

```
function addStewardToAllTerms(stewardId) {
    var added = 0;
    var error = 0;
    var already = 0;
    var terms = TeamServer.terms.list();
    for ( var i=0; i<terms.size(); i++ ) {
        var term = terms.get(i);
        if ( term.stewards.get(stewardId) === null ) {
            var result = term.stewards.add(stewardId);
            if (result.result == "OK") {
                added++;
            }
        }
        else {
            error++;
            println(result.message);
        }
    }
    else {
        already++;
    }
}
```

```
}  
}  
println( "Add steward " + stewardId + " to all terms: added " + added + ",  
already steward " + already + ", errors " + error);  
}  
addStewardToAllTerms("11");
```

## See Also

- [Server Code](#)
- [Apps](#)

# Group Pages

Groups pages provide information about groups: activity, details, discussions about them, people who are following them, and [included resources](#).

To open a group page, follow a group link.

Group pages share a [common header](#), and they also share a [common sidebar](#). When you click the items in the sidebar, you get access to information pages about different aspects of the target group.

## Group Pages Header



The group page header shows:







- A group icon.
- The name of the group.
- The type of resource ("Group").
- If you are the owner of the group or a [super user](#), you can click **[Delete]** to [delete the group](#).

On the top-right corner, you can click **+ Follow** to start following the current group, or **Following** to stop following it. See [Following Resources](#).

## Group Pages Sidebar

Group pages provide a sidebar with the following items:

## Group Pages

Item	Description
 <a href="#">Stream</a>	Opens the activity stream of the current Group. The sidebar shows <b>Followers</b> . A list of users that are following the current Group. See the <a href="#">Followers</a> subpage.
 <a href="#">Description</a>	Provides detailed information about the group.
 <a href="#">Discussions</a>	Opens the list of discussions about the current group.
 <a href="#">Followers</a>	Shows a list of users that are following the current group.
 <a href="#">Included Data Sources</a>	Shows the list of Data Sources that are included into the current group.
 <a href="#">Permissions</a>	Opens the users and groups permissions tab for the group.

## See Also

- [Working with Groups](#)
- [Working with Data Sources](#)

# Group Description

The **Description** subpage of [group pages](#) provides detailed information about a group.

The page is divided in two columns:

- o The [details column](#) on the left-hand side.
- o The [stewards column](#) on the right-hand side.

Created by [admin](#) on nov 18, 2013, last edited by [admin](#) on oct 10, 2014 [Edit](#)

**Stewards** [\[add\]](#)  
[admin](#)

### Detail

---

**Name**  
Sales Data

**Definition**

**Production Level**

**Location**

**Application affinity**

**Status**

**Abbreviations**

**Aliases/Synonyms**

**Additional Notes**

### Connection Properties

---

**Type**  
SQL Server

**Host Name**  
ETESVIM00

**Port**  
0

**Default Database**

**Protocol**  
Alias

**Encryption**  
false

**Packet Size**  
0

**Windows Authentication**  
true

**Custom Properties**

Property Name	Property Value
---------------	----------------

o

## Details Column

The details column provides the following fields:

## Group Description

Item	Description
Author and Date	On the top of the page, you can see the following text indicating the user who originally created the term, and the date when it was created:  Created by <Author> on <Date>
Edit	On the right-hand side of the author and date information, there is an <b>Edit</b> button that you can click to enter the edition mode.  In the edition mode, you can edit the term data, and click <b>Save</b> at the bottom of the page to save your changes, or <b>Cancel</b> to revert them.
Name	Name of the term.
Status	Text describing the status of the term.
Definition	Detailed description of the term.
Abbreviations	List of abbreviations of the term.
Aliases/Synonyms	List of aliases and synonyms of the term.
Additional Notes	Additional information about the business object.

## Stewards Column

The stewards column provides a list of **Stewards**, users with permission to edit the data source.

If you are on that list, you can click **Edit** there to add or remove people from the list.

## See Also

- [Working with Data Sources](#)
- [Data Source Fields for a Specific Database Management System](#)

# Login Page

The **Login** page lets you enter your user credentials to [access an ER/Studio Team Server installation](#).

You can only open this page if you are not currently logged in to **ER/Studio Team Server**. To access this page, open <http://teamserver.example.com/Login> in a web browser (replace "http://teamserver.example.com" by the actual URL of your ER/Studio Team Server installation).

This page provides the following items:

Item	Description
Username	Your username to access <b>ER/Studio Team Server</b> .
Password	Your password.
Remember me	Check this option to make <b>ER/Studio Team Server</b> remember you for a week, so that you do not need to enter your user credentials again during that period.
Log In	Click this button to access <b>ER/Studio Team Server</b> .

## See Also

- [Connecting to ER/Studio Team Server](#)

# Navigation Menu

The main navigation menu provides items to give you access to the main features of ER/Studio Team Server.

The availability of the items in the navigation menu changes depending on your license type:

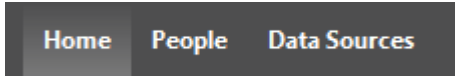
- [Basic Navigation Menu](#)
- [DBArtisan Navigation Menu](#)
- [ER/Studio Navigation Menu](#)

## See Also

- [Overview of User Experiences](#)

# Navigation Menu (Basic)

This are the available features on the navigation menu when you log as [super user](#) with no license registered:



The navigation menu provides the following items in this situation:

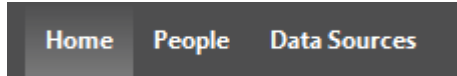
Item	Description
<a href="#">Home</a>	See recent activity of ER objects and people that your are following.
<a href="#">People</a>	Search for users.
<a href="#">Data Sources</a>	Search and manage Data Sources.

## See Also

- [Navigation Menu \(DBArtisan\)](#)
- [Navigation Menu \(ER/Studio\)](#)
- [Overview of User Experiences](#)

# Navigation Menu (DBArtisan)

This are the available features on the navigation menu when you have a **DBArtisan Team Server** license registered:



The navigation menu for **DBArtisan** users provides the following items:

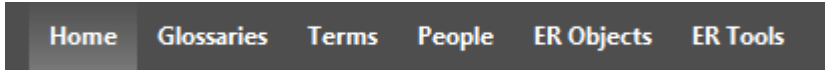
Item	Description
<a href="#">Home</a>	See recent activity of ER objects and people that your are following.
<a href="#">People</a>	Search for users.
<a href="#">Data Sources</a>	Search and manage Data Sources. Including Login Credentials and Monitoring capability.

## See Also

- [Navigation Menu \(Basic\)](#)
- [Navigation Menu \(ER/Studio\)](#)
- [Overview of User Experiences](#)

# Navigation Menu (ER/Studio)

This are the available features on the navigation menu when you have an **ER/Studio Team Server** license registered:



The navigation menu for **ER/Studio** users provides the following items:

Item	Description
<a href="#">Home</a>	See recent activity of ER objects and people that your are following.
<a href="#">Glossaries</a>	Search for glossaries.
<a href="#">Terms</a>	Search for terms.
<a href="#">People</a>	Search for users.
<a href="#">ER Objects</a>	Search for <a href="#">ER objects</a> of the <a href="#">Reporting Repository</a> .
<a href="#">ER Tools</a>	Lets you navigate to the business and technical reports and create custom reports. From here you can also access your favorite and shared searches and reports.
<a href="#">Data Sources</a>	Search and manage Data Sources, including the capability of <a href="#">relating models</a> .

## See Also

- [Navigation Menu \(Basic\)](#)
- [Navigation Menu \(DBArtisan\)](#)
- [Overview of User Experiences](#)

# Report Pages

Report pages provide the results of a report in HTML format.

At the top of the page you can access the following actions:

Action	Description
View as pdf	Downloads the report as a PDF file.
View as xls	Downloads the report as an XLS file, that is, a Microsoft Excel spreadsheet.

**Tip:** To print the HTML version of the report, use the printing function of your web browser. In most web browsers, you can press **Ctrl** + **P** to open the printing function.

## Report Pages

This is a list of available report pages:

- Reports that [super users](#) can open from the [Activity](#) page:
  - [Login Activity Details](#)
  - [Updated Object Details](#)
  - [Connection Activity Details](#)

# Connection Activity Details

**My Settings** > [Activity](#) | click a bar in the **Connection Activity** graphic ([super users](#))

In this report you can see a list of connections established during a specific time frame.

The report contains the following columns:

Column	Description
User Name	The name of the user that connected.
Host	The hostname of the machine from which the user connected.
IP	The IP address of the access point from which the user connected.
Login Time	The date when the user session started.
Logout Time	The date when the user session ended.
Connection Type	The <a href="#">connection type</a> that the user consumed.

## See Also

- [Activity](#)
- [Login Activity Details](#)
- [Updated Object Details](#)

# Login Activity Details

[My Settings](#) > [Activity](#) | click a bar in the **Login Activity** graphic ([super users](#))

In this report you can see the login activity during a specific time frame.

The report contains the following columns:

Column	Description
User Name	The name of the user that logged in.
User Description	The description of the user that logged in.
Login Time	The date when the user session started.
Connection Type	The <a href="#">connection type</a> that the user consumed.

## See Also

- [Activity](#)
- [Connection Activity Details](#)
- [Updated Object Details](#)

# Updated Object Details

**My Settings** > [Activity](#) | click a bar in the **Updated Objects** graphic ([super users](#))

In this report you can see a list of update events that affected ER objects of a specific ER object type during a specific time frame.

The report contains the following columns:

Column	Description
Event Date	The date when the update event took place.
Parent Name	The name of the parent of the updated ER object. You can click the parent name to access its <a href="#">ER object page</a> .
Name	The name of the updated ER object. You can click the ER object name to access its <a href="#">ER object page</a> .
User Name	The name of the ER/Studio Team Server user that modified the ER object.
Operation	The type of operation applied to the ER object.

## See Also

- [Activity](#)
- [Connection Activity Details](#)
- [Login Activity Details](#)

# Search Pages

Search pages let you search for a certain type of resources within the [Reporting Repository](#): glossaries, people, ER objects, etc.

Search pages are only available for [social users](#), and you can open them from the [navigation menu](#).

Although some of them provide additional buttons in the body, all search pages have the same [body](#) and [sidebar](#). The search filters may change slightly depending on which resource you are viewing.

For a list of search pages, see the following [index](#).

## Search Page Body

The body of every search page contains a header with at least the following items:

- The title of the search page.
- A search box to search for resources of the type of the search page. [Global searches](#) do not provide this field, as you can use the [global search box](#) instead.
- A list with all the letters in the alphabet. You can click any of the letters to show in the search results only those resources beginning with the chosen letter. At the beginning of the list, you can click the **All** option to disable the filter.

**All** A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Below the header there is the list of search results. Each search result provides at least the following information:

- An icon representing the resource.
- The name of the matching resource. You can click the name to open a page with details about the matching resource.
- On the right-hand side of each search result, there is an action area which might show any of the following:
  - A + **Follow** button to [start following the target matching resource](#).
  - A **Following** button that indicates that you are [following the matching resource](#). You can click this button to stop following the target matching resource.
  - Nothing, if you cannot follow the matching resource. For example, you cannot follow yourself, so your user entry when [searching for people](#) does not show any button.


[+ Follow](#)

In most search pages, under the name of the matching resource additional information about the resource is provided.


**Broker Id**

 GIMDB2.dm1 > Logical > Client Fact  
 ER Object > Attribute

[+ Follow](#)

When the number of search results is greater than the default number of search results to display on each search page, a pagination bar is displayed both before and after the list of search results:

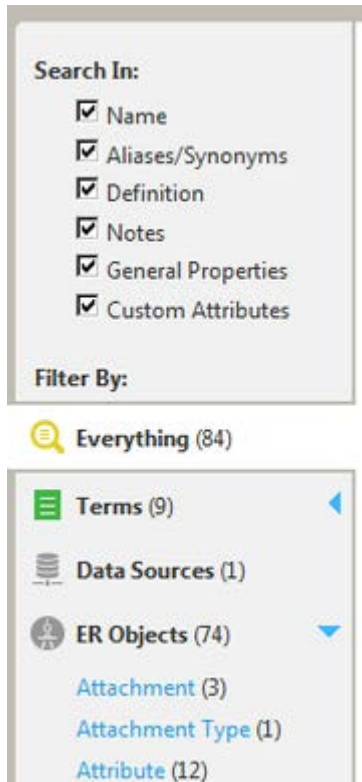


This pagination bar provides the following items:

Item	Description
< previous page	Loads the previous page of search results.
1 2 3 ...	In the center of the pagination bar, there is a list of page numbers, a number for each page of search results (until you reach a certain limit). You can click any number to load the target page of search results. For example, click <b>3</b> to load the third page of search results.
next page >	Loads the next page of search results.
items per page	Choose from the combo box the number of results per page that you want to see: 10, 20, 50, or 100.

## Search Page Sidebar

The sidebar of search pages shows different content depending on whether you are [performing a global search](#) or [searching for a specific type of items](#).



## Global Search Page Sidebar

When you perform a [global search](#), the left-hand sidebar provides two different sections: **Search In** and **Filter By**.

Under **Search In** there is a list of resource fields or field groups that you can search depending on the resource you are viewing:


- Name
- Aliases/Synonyms
- Definition
- Notes (searching includes both notes and additional notes)
- General Properties
- Custom Attributes

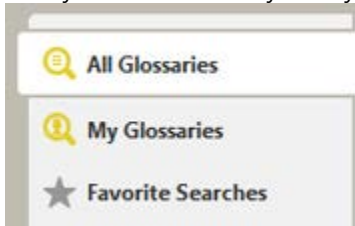
**Note:** For more effective searching, not all fields will be available to search for every resource. For example, when searching People, Terms, Glossaries or Data Sources the fields for Notes or General Properties are not included. When searching for People or ER Objects the search field for Aliases/Synonyms is not available.

You can check or uncheck any entry in the list. When you toggle an entry, ER/Studio Team Server repeats the search, and searches only those entries that are checked in the list.

Under **Filter By** there is a list of the types of resources that match the current search. You can click a resource type so that the search results include only resources of the selected type.

The first entry in the filter list, **Everything**, is selected by default when you start a global search, and does not filter the search results by resource type.

The **ER Objects** resource type, when listed under **Filter By**, has an icon on the right-hand side: . You can click that icon to display a list of subtypes (types of ER objects), and you can click any subtype to filter the search results by that type of ER object.



## Resource-specific Search Page Sidebar

The sidebar of search pages for specific types of resources always contains the following two entries:

- o **All <Search Page Name>**. Lets you search for any resource of the type of the search page.
- o **My <Search Page Name>**. Lets you search only for resources of the type of the search page that [you are following](#).
- o **Favorites Searches**. Provides a list of searches that you set and save as favorite. Also public searches stored by other users.

Where <Search Page Name> is the name of the search page, such as [Glossaries](#) or [ER Objects](#).

## Search Pages Index

The following search pages for specific types of resources are available:

- o [Glossaries](#)
- o [Terms](#)
- o [People](#)
- o [ER Objects](#)
- o [Data Sources](#)
- o [Apps](#)

# Glossaries

The **Glossaries** page is a [search page](#) that lets you [search for glossaries](#), [create new glossaries](#) or [load them from a CSV file](#).

On the upper-right corner you can access the following commands:

Item	Description
<a href="#">New Glossary</a>	Opens the <b>New Glossary</b> dialog box to <a href="#">create a new glossary</a> .
<a href="#">Export Glossaries</a>	Allows you to export glossaries and terms to a CSV file.
<a href="#">Load Glossaries</a>	Opens the <a href="#">Load CSV File</a> page to load glossaries and terms from a CSV file.
<a href="#">Glossary Tool Tip</a>	Opens the <b>Glossary Tool Tip</b> start page.

## See Also

- [Searching for a Resource of a Specific Resource Type](#)
- [Search Pages](#)

# Load CSV File

## Choose a File

The image shows a user interface for loading a CSV file. It consists of a text input field, a 'Browse...' button, and a 'Load' button.

[Glossaries](#) | click **Load Glossaries**

The **Load CSV File** page provides a field, **Choose a File**, where you can specify the path to a CSV file of [glossaries](#) and [terms](#) that you want to [load](#).

After you choose the path to the target CSV file, click **Load** to actually load the file. **ER/Studio Team Server** reloads the page and displays information about the glossaries and terms added or modified as a result of loading the CSV file.

## See Also

- [Loading Glossaries and Terms from a CSV File](#)

# New Glossary

[Glossaries](#) | click **New Glossary**

The **New Glossary** dialog box provides a set of fields that you can use to define a new [glossary](#).

After you finish filling the information about the new glossary, you can click **Save** to create your new glossary. You can click **Cancel** at any moment to abort.

These are the fields that you can fill in this page:

A screenshot of a 'New Glossary' dialog box. The dialog has a title bar with the text 'New Glossary' and a close button (X). Inside the dialog, there are four labeled input fields: 'Name', 'Parent Glossary', 'Status', and 'Description'. The 'Parent Glossary' field has a blue 'Add' button to its right. At the bottom of the dialog, there are two blue buttons: 'Save' and 'Cancel'. The 'Description' field is a larger text area with a small icon in the bottom right corner.

**New Glossary** [X]

**Name**


**Parent Glossary**  
 **Add**

**Status**

**Description**

**Save** **Cancel**

## New Glossary

Item	Description
Name	<p>The name of the glossary.</p> <p>This is the only field required to create a new glossary. As soon as you fill the <b>Name</b>, you can click <b>Save</b>. You can <a href="#">edit any other details later</a>.</p>
Parent Glossary	<p>An existing glossary that is a parent of the new glossary.</p> <p>As you write, <b>ER/Studio Team Server</b> offers names of existing glossaries for autocompletion. After you write the name of the parent glossary, click <b>Add</b> to actually select it.</p> <p>After you select a parent glossary, you can click  on the right-hand side of the parent glossary name to remove it, so that you can select a different parent glossary.</p>
Status	<p>Text that describes the status of the glossary using nomenclature you decide upon.</p> <p>You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", and "Deprecated".</p>
Description	Detailed information about the glossary, such as its purpose and audience.

## See Also

- [Creating a Glossary](#)

# Terms

The **Terms** page is a [search page](#) that lets you [search for terms](#) or [create new terms](#).

On the upper-right corner you can access the following command:

Item	Description
New Term	Opens the <a href="#">New Term</a> dialog box to <a href="#">create a new term</a> .

## See Also

- [Working with Terms](#)
- [Search Pages](#)

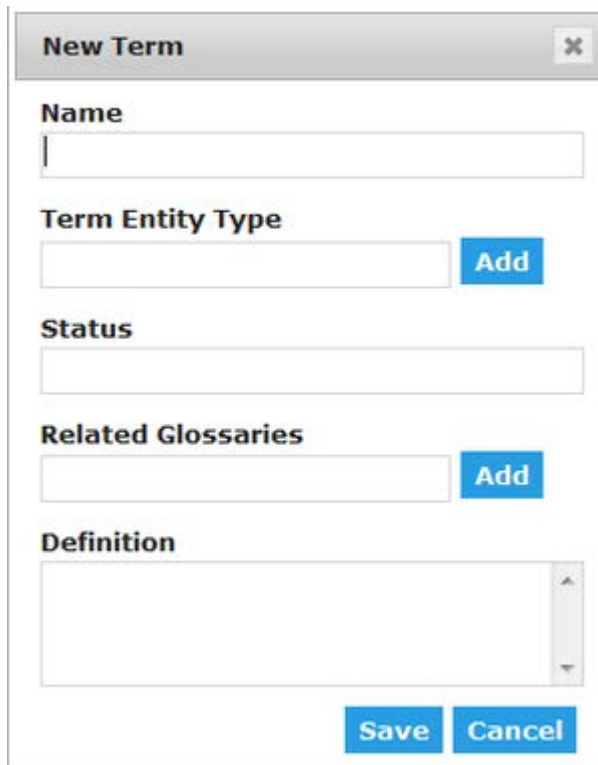
# New Term


[Terms](#) | click **New Term**

The **New Term** dialog box provides a set of fields that you can use to define a new [term](#).

After you finish filling the information about the new term, you can click **Save** to create your new term. You can click **Cancel** at any moment to abort.

These are the fields that you can fill in this page:

The image shows a 'New Term' dialog box with a title bar containing the text 'New Term' and a close button (X). The dialog contains several input fields and buttons. The 'Name' field is a single-line text box. The 'Term Entity Type' field is a single-line text box with an 'Add' button to its right. The 'Status' field is a single-line text box. The 'Related Glossaries' field is a single-line text box with an 'Add' button to its right. The 'Definition' field is a multi-line text box with a vertical scrollbar on the right. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

Item	Description
Name	<p>The name of the term.</p> <p>This is the only field required to create a new term. As soon as you fill the <b>Name</b>, you can click <b>Save</b>. You can <a href="#">edit any other details later</a>.</p>
Status	<p>Text that describes the status of the term using nomenclature you decide upon. You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", and "Deprecated".</p>
Related Glossary	<p>Existing glossaries that are related to the new term.</p> <p>As you write, <b>ER/Studio Team Server</b> offers names of existing glossaries for autocompletion. After you write the name of a glossary, click <b>Add</b> to add it to the list of related glossaries.</p> <p>After you select a related glossary, you can click  on the right-hand side of the glossary name to remove it.</p>
Description	Detailed information about the term, such as its purpose and audience.

## See Also

- [Creating a Term](#)

# People

The **People** page is a [search page](#) that lets you [search for ER/Studio Team Server users](#).

## See Also

- [Interacting with People](#)
- [Search Pages](#)

# ER Objects

The ER Objects page is a [search page](#) that lets you [search for ER objects](#).

## See Also

- [Searching for a Resource of a Specific Resource Type](#)
- [Search Pages](#)

# Data Sources

The **Data Sources** page is a [search page](#) that lets you [search for data sources](#) or [create new data sources](#) or [groups](#) of them.

To use the Data Source [Advanced Search](#) feature, click the link to the right of the search box.

On the upper-right corner, you can access the following command:

Item	Description
New Data Source	Opens the <a href="#">New Data Source</a> dialog box to <a href="#">create a new data source</a> .
New Group	Opens the <a href="#">New Group</a> dialog box to <a href="#">create a new group</a> .

## Advanced Search Feature

The data source advanced search feature allows you to add one or more search filters to narrow your search criteria. The search filters can search in a variety of details, connection types, or data source metrics.

- Use the dropdown list to select the fields that you want to search. For example, *Name* or *Location*.
- Use the next dropdown list to either match, not match, or find similar items.
- Use the text box to enter your search criteria. The search is not case-sensitive.

Using the add filter  icon allows you to use multiple search filters at one time.

You can save search filters with the **Save Filter As** button or load previously saved filters with the **Load Filter** button.

## See Also

- [Working with Data Sources](#)
- [Working with Groups](#)
- [Search Pages](#)

# New Data Source

[Data Sources](#) | click **New Data Source**

The **New Data Source** dialog box provides a set of fields that you can use to define a new [data source](#).

After you finish filling the information about the new data source, you can click **Save** to create your new data source. You can click **Cancel** at any moment to abort.

These are the fields that you can fill in this page:

**New Data Source**

**Detail**

Name

Definition

Production Level

Location

Status

**Connection Properties**

Type: DB2 LUW

Use DB2 client aliases: ☒ Enable

Host Name

Port

Remote DB Name

Schema ID

Function Path

OS Authentication: ☒ Enable

**Custom Properties**

Property Name	Property Value
Name	
Value	

Add

Save Cancel

Item	Description
Name	The name of the data source.
Type	Type of database management system (DBMS) that stores the database.
<DBMS Fields>	The fields after the <b>Type</b> field and before the <b>Custom Properties</b> field change depending on the selected DBMS <b>Type</b> . See <a href="#">Data Source Fields for a Specific Database Management System</a> .
Custom Properties	Here you can define custom properties for the data source. For each property: <ol style="list-style-type: none"> <li>1. Enter the <b>Name</b> of the property.</li> <li>2. Enter the <b>Value</b> for the property.</li> <li>3. Click <b>Add</b> to add the defined property-value pair to the list of properties of the data source.</li> </ol>
Description	Detailed information about the data source, such as its purpose and audience.

## See Also

- [Creating a Data Source](#)

# Apps

The **Apps** page is a [search page](#) that lets you [search for applications](#) or [create a new one](#).

On the upper-right corner you can access the following command:

Item	Description
New App	Opens the <a href="#">New App</a> dialog box to <a href="#">create a new App</a> .

## See Also

- [Working with Apps](#)
- [Developer Guide](#)

# New App

[Apps](#) | click **New App**

The **New App** dialog box provides a set of fields that you can use to define a new [application](#).

After you finish filling the information about the new app, you can click **Save** to create your new application. You can click **Cancel** at any moment to abort.



The screenshot shows a 'New App' dialog box. It has a title bar with the text 'New App' and a close button (X). Below the title bar are three input fields: 'Name', 'Status', and 'Definition'. The 'Name' field is a single-line text box. The 'Status' field is a single-line text box. The 'Definition' field is a multi-line text box. At the bottom of the dialog box are two buttons: 'Save' and 'Cancel'.

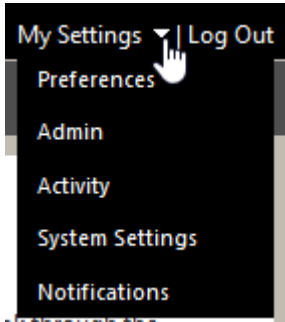
These are the fields that you can fill in this page:

Item	Description
Name	The name of the app. This is the only field required to create a new term. As soon as you fill the <b>Name</b> , you can click <b>Save</b> . You can <a href="#">edit any other details later</a> .
Status	Text that describes the status of the term using nomenclature you decide upon. You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", and "Deprecated".
Description	Detailed information about the term, such as its purpose and audience.

## See Also

- [Creating an App](#)

# User Menu



The user menu lets you access to features that are specific to your user, and lets you customize your personal settings.

The user menu contains two items:

- **My Settings.** Hover this item to show a context menu with [additional menu items](#).
- **Log Out.** Logs you out of ER/Studio Team Server, ending your current user session.

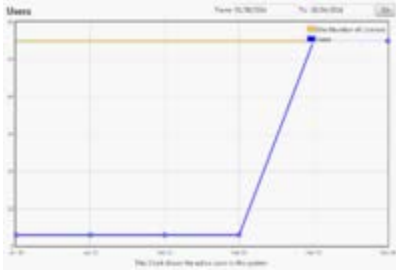
## My Settings Context Menu Items

Item	Description
Help	Displays the online help.
<a href="#">Preferences</a>	Lets you define your email address, as well as your search and filtering preferences.
<a href="#">Labels</a> (only <a href="#">non-social users</a> )	Opens a list with your labels and labeled ER objects. See <a href="#">Working with ER Object Labels</a> .
<a href="#">Comments</a> (only <a href="#">non-social users</a> )	Opens a list with your comments to ER objects. See <a href="#">Working with ER Object Comments</a> .
<a href="#">Watches</a> (only <a href="#">non-social users</a> )	Opens a list with the ER objects that you are <a href="#">watching for updates</a> .
<a href="#">Admin</a> (only <a href="#">super users</a> )	Gives you access to administrative functions. <a href="#">Manage licenses</a> , <a href="#">permissions</a> , <a href="#">data synchronization</a> , <a href="#">schedules</a> , and more.
<a href="#">Activity</a> (only <a href="#">super users</a> )	Displays graphics of login activity, connection activity, and ER object history. You can click the bars on the graphics to access detailed reports.
<a href="#">SystemSettings</a> (only <a href="#">super users</a> )	Gives you access to social administrator configuration.
<a href="#">Notifications</a> (only <a href="#">social users</a> )	Lets you configure your notification settings.

## See Also

- [User Guide](#)

# Activity



My Settings > Activity ([super users](#))

On this page you can see who is logged in to ER/Studio Team Server, view login denials, API connections and display a historical chart of connection activity.

This page provides the following graphics:

- o [Denials](#)
- o [Users](#)
- o [API Usage](#)
- o [Web Site Usage](#)

## Denials

This graphic shows the denials in a time period. To see further information, click in a graph node to pop up a dialog with the information about the denials, including User Name, Login Type and the Time of Denial.

You can enter a start and an end date, and click **Go** to update the graphic so that it reflects the specified time period.

When you hover the pointer over a node representing activity for a specific day, ER/Studio Team Server displays information about the graph node.

## Users

This graphic shows the number of active Users in a cumulative chart by day in a time period. Also depicted is the Max Number of Licenses, showing the maximum allowed users.

Clicking on a node pops up a separate dialog with detailed information of User Name, Login Type, License, and Time.

If you hover your mouse over a node, it will pop up a tooltip giving specific information.

## API Usage

This graphic shows the logins by license type and the total logins in a time period by API.

Clicking on a bar pops up a separate dialog with detailed information of User Name, Login Type, License, and Time.

If you hover your mouse over a node, it will pop up a tooltip giving specific information.

You can enter a start and an end date, and click **Go** to update the graphic so that it reflects the specified time period.

## Web Site Usage

This graphic shows the logins by license type and the total logins in a time period.

You can select which license type, Connect or Portal to be displayed on the bar graph, by changing the drop-down list.

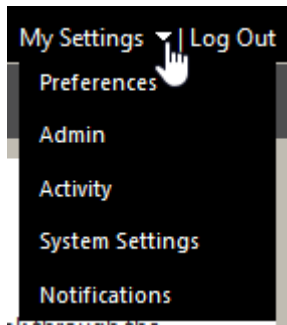
If you hover your mouse over a node, it will pop up a tooltip giving specific information.

You can enter a start and an end date, and click **Go** to update the graphic so that it reflects the specified time period.

## See Also


- [Tracking User Activity](#)
- [Overview of Connection Licenses](#)
- [Admin](#) section
- [Report Pages](#)

# Admin Page



My Settings > Admin ([super users](#))

This section gives you access to pages where you can perform administrative tasks:

Item	Description
<a href="#">Repository Management</a>	Lets you manage the <a href="#">Reporting Repository</a> .
<a href="#">Licenses</a>	Use this page to <a href="#">manage your ER/Studio Team Server licenses</a> and check the activity of the logged-in users.
<a href="#">Solution Permissions</a>	Lets you <a href="#">manage permission on Action Sequences</a> for user and roles.
<a href="#">ER/Studio Synchronization</a>	Use this page to synchronize the <b>ER/Studio Repository</b> database with the <a href="#">Reporting Repository database</a> . See <a href="#">Overview of Data Synchronization</a> .
<a href="#">Comments</a> (only <a href="#">non-social users</a> )	Act as a moderator to review, approve, and delete the comments other users have attached to ER objects.
<a href="#">Schedules</a>	Use this page to check the status of the scheduler, suspend the scheduler, resume from suspend, or see a list of the schedule jobs. See <a href="#">Overview of Scheduling</a> .
<a href="#">Subscriptions</a>	A subscription binds an administrative function such as cleaning or synchronizing the repository to a schedule.  Use this page to create and manage subscriptions, subscription schedules, and scheduled jobs. See <a href="#">Overview of Scheduling</a> .
<a href="#">Managed Attributes</a> (only <a href="#">social users</a> )	Use this page to manage the attachment attributes of your <a href="#">ER objects</a> .
<a href="#">Interaction Settings</a>	Use this page to manage user interaction settings. You can allow/disallow users to moderate comments, provide the email address of the moderator, enable/disable sending emails for search results and reports.
<a href="#">Object Alerts</a>	Use this page to access and <a href="#">edit</a> any <a href="#">alert condition</a> defined in <b>ER/Studio Team Server</b> .
<a href="#">Term Entity Types</a>	Use this page to add, edit, or delete Term Entity Types.
<a href="#">Manage Search Results</a>	Use this page to choose which fields are displayed in the search results for <a href="#">Data Sources</a>
<a href="#">Glossary Tool Tip</a>	Use this page to manage the <a href="#">glossaries</a> that be returned for each URL Pattern.
<a href="#">Permissions</a>	Use this page to manage permissions for users and groups.   <b>Team Server 4.0.1:</b> In this version the link name is <a href="#">Access Control List</a>

[Password Locker  
Audit](#)

Use this page to audit every connection to Password Lockers.

## See Also

- [Administrator Guide](#)

# Working with Resources

ER/Studio Team Server gives you access to various types of resources:

- [Glossaries](#)
- [Terms](#)
- [People](#)
- [ER Objects](#)
- [Data Sources](#)
- [Apps](#)
- [Groups](#)

The following topics are shared by more than one type of resource:

- [Searching for a Resource of a Specific Resource Type](#)
- [Favorite Searches for a Specific Resource Type](#)
- [Editing a Resource](#)
- [Discussing Resources](#)
- [Following Resources](#)
- [Editing the Stewards of a Resource](#)
- [Adding an Attachment Attribute to a Resource Type](#)
- [Loading Glossaries and Terms from a CSV File](#)
- [Deleting a Resource](#)

## See Also


- [Resource Pages](#)

# Adding an Attachment Attribute to a Resource Type

You can associate enterprise data dictionary [attachments](#) with the following ER/Studio Team Server resource types: [glossaries](#), [terms](#), [people](#), [data sources](#), and the following [ER objects](#): [tables](#), [columns](#), [logical entities](#), [logical attributes](#), [business entities](#) and [business attributes](#).

When you associate an attachment to a resource type, the **Description** subpage of the [pages of that type of resource](#) include the associated attachment as a custom attribute which you can edit from **ER/Studio Team Server**.

To associate an enterprise data dictionary attachment with a resource type:

1. Select **My Settings > Admin > [Managed Attributes](#)**.
2. Select the tab of the target type of resource. For example, **Data Source**.
3. On the left-hand side column, click an attachment to select it.
4. Click the  icon to add the selected resource to the right-hand side column.

The selected attachment is now associated with the current resource type.

## See Also

- o [Resource Pages](#)

# Deleting a Resource

You can delete a [glossary](#), a [term](#), or a [data source](#) as long as you are its original author (the user who creates the resource), a [stewards of the resource](#), or a [super user](#).

To delete a resource of any of those types:

1. Open the [page of the target resource](#). You can [search for it](#).
2. On the [resource page](#), click **[Delete]** on the header.
3. On the confirmation dialog box that opens, click **OK**.

The target resource is not available anymore in **ER/Studio Team Server**.

**Note:** Deleting a resource does not delete the resources that are related to it. For example, if you delete a [glossary](#), any [term](#) associated with it remains in **ER/Studio Team Server**.

## See Also

- o [Creating a Glossary](#)
- o [Creating a Term](#)
- o [Creating a Data Source](#)

# Discussing Resources

ER/Studio Team Server lets you keep discussions with other ER/Studio Team Server users about any resource ([glossaries](#), [terms](#), [ER objects](#), and [data sources](#)).

You can access the discussions about a specific resource from the [Discussions](#) subpage of the [target resource page](#).

## Topics


- [Starting a Discussion about a Resource](#)

## See Also

- [Following Resources](#)
- [Adding a Comment to an ER Object](#)

# Starting a Discussion about a Resource

To start a discussion about a resource:

1. Open the [page of that resource](#). You can try [searching for it](#).
2. Open the  [Discussions](#) subpage.
3. Click **New Discussion** on the top-right corner.
4. On the **New Discussion** dialog that opens:
  1. Write the discussion title in the upper, one-line field.
  2. Write your initial discussion message inside the multi-line text field.
  3. Click **Create** to start the discussion.


Your new discussion topic is added to the list of topics in the [Discussions](#) page so that other people can see it and join the discussion.

## See Also

- o [Discussions](#) page

# Editing a Resource

To edit a [glossary](#), a [term](#), or a [data source](#):

1. Open the [page of the target resource](#). You can [search for it](#).
2. Open the  **Description** subpage.
3. Click **Edit** to enter the edit mode. In edit mode, the **Description** page provides fields to define the values of each property of the target resource.
4. Modify the resource properties.

**Tip:** For information about the fields that you can edit, check the documentation of the description page of the type of resource that you are editing: [glossary](#), [term](#), or [data source](#).

5. To save your changes, click **Save** at the end of the page.





**Note:** To automatically update any matched items to the edited changes, the Auto Match tick box on the **Found In** tab must be enabled.

## See Also

- [Editing the Stewards of a Resource](#)
- [Working with Glossaries](#)
- [Working with Terms](#)
- [Working with Data Sources](#)

# Editing the Stewards of a Resource

To add or remove [stewards](#) from a resource:

1. Open the [page of the target resource](#). You can [search for it](#).
2. Open the  **Description** subpage.
3. Click **Edit** on the right-hand column, on the right-hand side of **Stewards**, to enter the edit mode.
4. In edit mode, you can:
  - Enter the name of a user into the text field and click **Add** to add that user to the list of stewards.
  - Click  on the right-hand side of an existing steward to remove that user from the list of stewards.
5. To save your changes, click **Done** on the right-hand side of the **Stewards** header.

## See Also

- [Overview of Stewards](#)
- [Editing a Resource](#)

# Following Resources

ER/Studio Team Server keeps track of people activity surrounding resources ([glossaries](#), [terms](#), [ER objects](#), and [data sources](#)). It records when someone edits a resource, posts a comment to a resource, and so on.

You can [follow a resource](#) so that you can keep track of all the activity that surrounds that resource. You can see the activity of every resource that you are following in your [Home](#) page.

## Topics

- [Following a Resource](#)
- [Posting a Comment to a Resource](#)
- [Unfollowing a Resource](#)

## See Also

- [Discussing Resources](#)
- [Watching ER Objects for New Comments](#)
- [Stream page](#)
- [Followers page](#)

# Following a Resource

To start following a resource:

1. Open the [page of that resource](#). You can try [searching for it](#).
2. Click **+ Follow** on the upper-right corner of the [resource page header](#).

You are now following the resource, and its activity is displayed in your [Home](#) page.



## See Also

- o [Unfollowing a Resource](#)

# Posting a Comment to a Resource

You can post a comment to a **ER/Studio Team Server** resource ([glossaries](#), [terms](#), [ER objects](#), and [data sources](#)) so that people [following that resource](#) is notified, and anyone can read your comment in the [Stream](#) subpage of the [resource page](#).

To post a comment to a resource:

1. Open the [page of that resource](#). You can try [searching for it](#).
2. Open the  [Stream](#) subpage.
3. Write your comment into the field with the text "Write a comment...", and click  to send your comment.

ER/Studio Team Server adds your comment to the [Stream](#) page, and notifies any user following the resource.

## See Also

- o [Following a Resource](#)
- o [Stream](#) page

# Unfollowing a Resource

To stop following a resource:

1. Open the [page of that resource](#). You can try [searching for it](#).
2. Click **Following** on the upper-right corner of the [resource page header](#).

You are not following the resource anymore , and its activity is no longer displayed in your [Home](#) page.

## See Also

- o [Following a Resource](#)

# Manage User Permissions on a Resource

To manage User Permissions:

1. Select **Permissions** page and then select Users tab.
2. Click the **Edit** button on the upper-right corner.

The Manage User Permissions page shows a permissions table where you can set specific permissions for Glossaries, ER Objects, Datasources, Login Credentials, Reports and Applications.

**Permissions**  
Manage User Permissions

**admin**

**Permissions**

Resource Type	List/View	Create	Update/Delete	Stewards	Secretion
Glossaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ER Objects	<input type="checkbox"/>		<input type="checkbox"/>		
Data Sources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Login Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**Groups Membership**

Available Groups

- Managers
- Readers

Groups user currently belongs to

- Authors

It shows the following options for each element type:

Item	Description
List/View	Check this option to allow only read permissions.
Create	Check this option to allow creating the resources.
Update/Delete	Check this option to allow editing and deleting the resources.
Stewards	Check this option to allow user to manage the <a href="#">Stewards</a> of a resource.

The Groups Membership table allows you to include the user on permissions groups.

Click the **Save** button to save your settings.

# Manage Group Permissions on a Resource

To manage Groups Permissions:

1. Select **Permissions** page and then select Groups tab.
2. Click the **Edit** button on the upper-right corner.

The Manage Groups Permissions page shows a permissions table where you can set specific permissions for Glossaries, ER Objects, Datasources, Login Credentials, Reports and Applications.

**Permissions**  
Manage Group Permissions

Name  
[Text Box]

Definition  
[Text Box]

**Permissions**

Element Type	List/View	Create	Update/Delete	Stewards	Execution
Glossaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ER Objects	<input type="checkbox"/>		<input type="checkbox"/>		
Data Sources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Login Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**Members**

Available Users  
[List Box]

Users currently in this group  
[List Box]

[Add] [Remove]

[Save] [Cancel]

It shows the following options for each element type:

Item	Description
List/View	Check this option to allow only read permissions.
Create	Check this option to allow creating the resources.
Update/Delete	Check this option to allow editing and deleting the resources.
Stewards	Check this option to allow user to manage the <a href="#">Stewards</a> of a resource.

The Members table allows you to include the user on permissions groups.

You can also modify the name and the description of the group on this page.

Click **Save** button to save your settings.

### See Also

- [Admin](#)
- [Manage User Permissions on a Resource](#)
- [Deleting a Permissions Group](#)

# Interacting with People

You can interact with [social users](#) (people) as you interact with any other **ER/Studio Team Server** resource. They have [their own search page](#), [resource page and subpages](#), and so on.

To see the details of a user, [find it](#) and open its [person page](#).

## Topics

- [Searching for a User](#)
- [Following People](#)
- [Adding an Attachment Attribute to People](#)

## See Also

- [People](#) search page
- [Person Pages](#)

# Loading Glossaries and Terms from a CSV File

You can load into ER/Studio Team Server, [glossaries](#) and [terms](#) from CSV file if you have a CSV file that follows the [required format](#).

To load glossaries and terms from a CSV file:

1. Select [Glossaries](#) on the [navigation menu](#).
2. Click **Load Glossaries** on the upper-right corner of the **Glossaries** page.
3. On the [Load CSV File](#) page that opens:
  1. Click **Browse** and choose the target CSV file.
  2. Click **Load**.

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



**Note:** If you have any formatting errors in your csv file, you may receive an error message. The log file that you can check for any import errors is located at: [...installation path\Embarcadero Team Server 4.0\logs\ersportal.log](#)

## See Also

- o [Creating a Glossary](#)
- o [Creating a Term](#)

# CSV Format to Load Glossaries and Terms

ER/Studio Team Server can load CSV (comma-separated values) files containing information about [glossaries](#) and [terms](#) as long as they follow the expected format.

Later in this topic are some examples of the format required to import either Glossaries or Terms.

Each set of rows contains four or more rows with the following content:

- The first row contains a fixed value, the start tag, which depends on the type of resource:
  - If you want to define a glossary: `+++ Glossaries Begin +++`.
  - If you want to define a term: `+++ Terms Begin +++`.
- The second row contains a comma-separated list of the names of [properties of the target type of resource](#) that we want to define later. Only the resource name is mandatory.
- Between the second row and the last row you can insert as many rows as you want. Each one of the rows represents a single glossary or term, and contains a comma-separated list of property values for that resource. The order that you have to use to specify the resource property values is that of the property names in the second row.
- The last row contains a fixed value, the end tag, which depends on the type of resource:
  - If you defined a glossary: `+++ Glossaries End +++`.
  - If you defined a term: `+++ Terms End +++`.

See also the [examples of CSV files](#) below.

## Properties that You Can Use in Your CSV File

The property names that you can use on the second row of a set depends on whether your set defines a [glossary](#) or a [term](#).

## Glossary Properties

Item	Description
Key	This value is filled when exporting existing glossaries and terms. Updating with the key now allows you to modify the name without creating new ones. The Key field is left empty when creating new glossaries.
Name (mandatory)	Name of the glossary.
Status	Chosen Status (this is a status of the glossary that is predefined by you).
Stewards	List of usernames of <b>ER/Studio Team Server</b> users that must become <a href="#">stewards</a> of the new glossary. Separate values with a semicolon. For example: username1 ;username2.
Definition	Definition of the new glossary.
Abbreviations	An Abbreviation of the glossary.
Aliases	An alias for the glossary.
AdditionalNotes	Anything you would like to define in the Additional Notes section of your glossary.
ParentGlossary	Name of the parent glossary, in case you wish to structure your Glossary as a child of another glossary.
[CustomAttributes]	Indicate the name of a custom attribute in the column header and value in a row. A custom attribute should be assigned to glossaries in advance or it will be ignored.

## Term Properties

Item	Description
Key	This value is filled when exporting existing glossaries and terms. Updating with the key now allows you to modify the name and term type, without creating new ones. The Key field is left empty when creating new terms.
Name (mandatory)	Name of the term.
Status	Chosen Status (this is a status of the term that is predefined by you).
Stewards	List of usernames of <b>ER/Studio Team Server</b> users that must become <a href="#">stewards</a> of the new term. Separate values with a semicolon. For example: username1 ;username2.
Definition	Definition of the new term.
Abbreviations	An Abbreviation of the term.
Aliases	An alias for the term.
AdditionalNotes	Anything you would like to define in the Additional Notes section of your term.
RelatedGlossaries	Name of any related glossaries. Separate values with a semicolon. For example: Glossary1 ;Glossary2.
RelatedTerms	Name of any related terms. Separate values with a semicolon. For example: Term1 ;Term2.
TermEntityType	Name of the Term Entity Type. This can be predefined by you when creating terms, or from the <b>Term Entity Types</b> subpage of the admin pages.
[CustomAttributes]	Indicate the name of a custom attribute in the column header and value in a row. A custom attribute should be assigned to glossaries in advance or it will be ignored.

## Custom Attributes

The custom attributes format depends on the type.

Type	Format	Example
Date	MM/DD/YYYY.	01/23/2013
Boolean	True or False	True
Time	HH:MM:A	01:25 PM
Numeric	Integer Number	364
External File Path	String	\\servername\file.txt
Text	String	Some Text
Text List	String and matching valid values	Value1

## Examples of Valid CSV Files

These are some example CSV files that you can load into **ER/Studio Team Server**.

### Single Glossary

The following CSV code defines a single glossary named "Accounting".

```
+++ Glossaries Begin +++
Key,Name,Status,Definition,Abbreviations,Aliases,AdditionalNotes,Stewards,,,,,
'',
,Accounting,Approve,"Glossary of commonly used accounting
terms.",,,,admin,,,,,,,,
+++ Glossaries End +++
```

### Terms

The following CSV code defines terms named "AMT" and "Abatement".

```
+++ 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 +++
```

## See Also

- [Creating a Glossary](#)

- o [Creating a Term](#)

# Searching for a Resource of a Specific Resource Type

To search for resources of a specific resource type ([glossaries](#), [terms](#), [people](#), [ER objects](#), or [data sources](#)):


1. Select the [search page](#) of the target resource type: [Glossaries](#), [Terms](#), [People](#), [ER Objects](#), or [Data Sources](#).
2. Enter your search terms in the search field.

As soon as you stop typing, **ER/Studio Team Server** filters the list of resources and displays only resources that meet your search criteria. Click their name to open their [resource page](#).

## Advanced Search

Using the advanced search you have more control of the search than with any other search box in ER/Studio Team Server. For advanced search:

1. Click **Advanced** button [search page](#) of the target resource.
2. In the Property drop-down list select the property you want to filter for.
3. Select the condition: Is, Like, Not Like...
4. In the Value field, enter a valid value for the selected property. This will limit the search results.
5. Click **Search**. The [Advanced Search](#) page reloads to show the search results.

If you need to add additional filters, click the  button on the right-hand side of the first set of filter fields.

## Favorite Searches

After completing an **advanced search**, you can name and save the search for later use.

To save an advanced search as favorite:

1. Perform an advanced search.
2. Click **Save Search As**.
3. On the **New Search** dialog box that opens:
  - Enter a descriptive **Name** for your search.
  - Optionally, write a **Description** that provides additional details that would not fit the search name.

- Optionally, check the **Shared** checkbox to make your new favorite search public, so that any other user can access your search from the [Favorite Searches](#) page. If you leave this option unchecked, only you can access your new favorite search from the **Favorite Searches** page.

After you save your new [Advanced Search](#) as favorite, you can find it in the [Favorite Searches](#) page.

## See Also

- [Search Pages](#)
- [Favorite Searches for a Specific Resource Type](#)

# Working with Glossaries

Glossaries are collections of [terms](#), such as "Human Resources", "Travel Department", or "Customer Service". Glossaries can contain many terms, and each term can be associated with many glossaries.

When you [create a glossary](#) or [load them from a CSV file](#), you become its owner. Only you or a [super user](#) can [add terms to it](#) or [delete it](#).

To see the details of an existing glossary, [find it](#) and open its [glossary page](#).

## Topics


- [Creating a Glossary](#)
- [Loading Glossaries from a CSV File](#)
- [Searching for a Glossary](#)
- [Editing a Glossary](#)
- [Adding a Term to a Glossary](#)
- [Adding a Child to a Glossary](#)
- [Discussing Glossaries](#)
- [Following Glossaries](#)
- [Editing the Stewards of a Glossary](#)
- [Adding an Attachment Attribute to Glossaries](#)
- [Deleting a Glossary](#)
- [Glossary Tool Tips](#)

## See Also

- [Glossaries search page](#)
- [Glossary Pages](#)
- [Working with Terms](#)

# Adding a Child to a Glossary

To make an existing [glossary](#) a child of another glossary:

1. Open the [page of the parent-to-be glossary](#). You can [search for it](#).
2. Open the  [Children](#) subpage.
3. Open the **Manage** tab.
4. In the list of existing glossaries, click **Add Child** on the right-hand side of a glossary to add as a child of the current glossary.

## Notes:


- You can use the search field at the top of the page to filter the list of existing glossaries.
- You can click **Remove Child** on right-hand side of a glossary, on any of the tabs, to remove the glossary from the list of children of the current glossary.

## See Also

- o [Creating a Glossary](#)
- o [Children](#) subpage

# Adding a Term to a Glossary

To add existing [terms](#) to a [glossary](#):

1. Open the [page of the target glossary](#). You can [search for it](#).
2. Open the  [Terms](#) subpage.
3. Open the **Relate** tab.
4. In the list of existing terms, click **Relate** on the right-hand side of a term to add it to the current glossary.

## Notes:

- You can use the search field at the top of the page to filter the list of existing terms.
- You can click **Unrelate** on right-hand side of a term, on any of the tabs, to remove the term from the current glossary.

## See Also

- [Creating a Term](#)
- [Associating a Term with a Glossary](#)
- [Related Terms](#) subpage


# Creating a Glossary

To create a [glossary](#):

1. Select [Glossaries](#).
2. Click the **New Glossary** button on the upper-right corner.
3. In the [New Glossary](#) dialog box that opens:
  1. Enter a **Name** to identify your new glossary.
  2. Optionally, if you want your new glossary to be a child of an existing glossary:
    1. Write in **Parent Glossaries** the name of an existing glossary.

**Tip:** As you write the name of the parent glossary, a context menu appears listing existing glossaries. You can click an item in the context menu instead of manually writing the whole name of the parent glossary. You can select multiple parent glossaries.

2. Click **Add** to set the parent.

**Note:** Click the  icon to the right-hand side of the parent name to unset the parent glossary.

3. 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", and "Deprecated".
4. Write a **Definition** that provides detailed information about the glossary, such as its purpose and audience.
5. Click **Save** to save your new glossary.

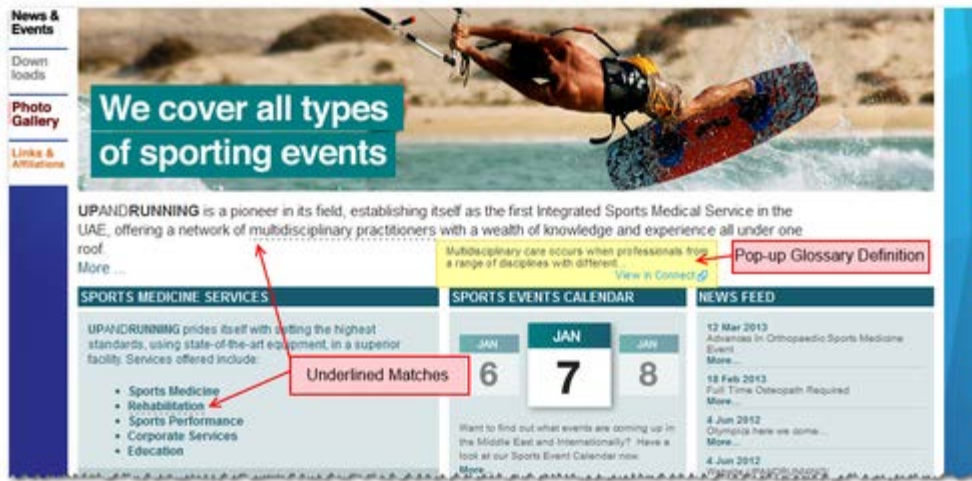
## See Also

- o [Adding a Child to a Glossary](#)
- o [Associating a Term with a Glossary](#)
- o [Deleting a Resource](#)
- o [New Glossary](#) dialog box

# Glossary Tool Tip

Glossary Tool Tips are links to your **ER/Studio Team Server** [Glossaries](#) of matched words and phrases in your browser. When you browse any web page that is in your list of configured sites, matched [Terms](#) are automatically highlighted.

The page below is an example of a pop-up definition of the underlined [Term](#).



The underlined matches are [Terms](#) found in your **ER/Studio Team Server** installation. When you hover your mouse over the underlined word, the pop-up box will show the first definition found in your list of Terms. A link is provided to open your browser to your **ER/Studio Team Server** pages of the related Term, where you can browse your company [Glossaries](#) for other [related Terms](#) and [ER Objects](#).

After your [Glossary Tool Tips](#) are enabled, browsing on any web page that has been configured to be included will cross reference any matching [Terms](#) in your **ER/Studio Team Server** installation.



**Note:** Glossary Tool Tip is currently only available for Firefox web browser and requires [Greasemonkey Add-on](#).




**Note:** You do not need to be signed in to **ER/Studio Team Server** to use Glossary Tool Tip, however if your **ER/Studio Team Server** installation uses a [secure HTTPS connection](#) then the **ER/Studio Team Server**'s [digital certificate](#) must have previously been accepted/imported/installed.

## See Also

- o [Installing Glossary Tool Tips](#)
- o [Glossaries](#)
- o [Manage Glossary Tool Tips](#)

# Installing Glossary Tool Tips

To enable [Glossary Tool Tips](#) on your browser:

1. Install the Firefox browser [Greasemonkey Add-on](#).
2. Open [Glossaries](#) from the [Navigation Menu](#) and click the  button.

**Note:** The link is also available by clicking **Click here for more information** at the bottom of every page, including the initial page, prior to log on.

1. On the page that opens, click the  button to install the Greasemonkey script.

By default, the script has all web pages enabled. Your Administrator can include and exclude various websites by editing the settings using the administration interface, see [Manage Glossary Tool Tips](#).

When you browse to an included page that has [Terms](#) matched to a Term in your Glossaries, it will be underlined. Hover over the underlined Term with your mouse to show the definition or click the popup to open in **Connect**.

## See Also

- [Manage Glossary Tool Tips](#)
- [Glossary Tool Tip](#)
- [Glossaries](#)
- [Terms](#)

# Working with Terms

Terms represent general concepts related to the business, such as "Social Security", "Tax ID", "Zip Code", or "Call Resolution Time".

When you [create a term](#), you become its owner. You can then associate your term [with ER objects](#), [with glossaries](#), and [with other terms](#). To see the details of an existing term, [find it](#) and open its [term page](#).

## Topics


- [Creating a Term](#)
- [Loading Terms from a CSV File](#)
- [Searching for a Term](#)
- [Editing a Term](#)
- [Associating a Term with a Glossary](#)
- [Associating a Term with Another Term](#)
- [Associating a Term with an ER Object](#)
- [Linked Terms](#)
- [Matching a Term with ER Objects](#)
- [Discussing Terms](#)
- [Following Terms](#)
- [Editing the Stewards of a Term](#)
- [Adding an Attachment Attribute to Terms](#)
- [Deleting a Term](#)

## See Also

- [Terms Search Page](#)
- [Term Pages](#)
- [Term API](#)
- [Working with Glossaries](#)

# Associating a Term with a Glossary

To associate a [term](#) with an existing [glossary](#):

1. Open the [page of the target term](#). You can [search for it](#).
2. Open the  [Related Glossaries](#) subpage.
3. Open the **Relate** tab.
4. In the list of existing glossaries, click **Relate** on the right-hand side of a glossary to associate it with the current term.

## Notes:


- You can use the search field at the top of the page to filter the list of existing glossaries.
- You can click **Unrelate** on right-hand side of a glossary, on any of the tabs, to disassociate the glossary with the current term.

## See Also

- [Creating a Glossary](#)
- [Adding a Term to a Glossary](#)
- [Related Glossaries](#) subpage

# Associating a Term with an ER Object

To associate an existing [term](#) with [ER objects](#):

1. Open the [page of the target term](#). You can [search for it](#).
2. Open the  [Related ER Objects](#) subpage.
3. Open the **Relate** tab. The tab contains a search page, similar to the [ER Objects](#) page.
4. In the list of ER objects, click **Relate** on the right-hand side of an ER object to associate it with the current term.

## Notes:


- You can use the search field at the top of the page to filter the list of existing ER objects.
- You can click **Unrelate** on the right-hand side of an ER object to break its relation with the current term.

## See Also

- [Associating an ER Object with a Term](#)
- [Related ER Objects](#) subpage

# Associating a Term with Another Term

To associate an existing [term](#) with another existing term:

1. Open the [page of one of the terms](#). You can [search for it](#).
2. Open the  [Related Terms](#) subpage.
3. Open the **Relate** tab.
4. In the list of terms, click **Relate** on the right-hand side of a term to associate it with the current term.

## Notes:

- You can use the search field at the top of the page to filter the list of existing terms.
- You can click **Unrelate** on the right-hand side of a term to break its relation with the current term.
- As well as with relating terms, you may also group terms by **Term Entity Type**. See the [Creating a Term](#) page on how to do this.

## See Also

- [Creating a Term](#)
- [Related Terms](#) subpage


# Creating a Term

To create a [term](#):

1. Select [Terms](#).
2. Click the **New Term** button on the upper-right corner.
3. On the **New Term** dialog box that opens:
  1. Enter the **Name** of your new Term.
  2. Define the **Status** of the Term using a nomenclature you decide upon. You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", or "Deprecated".
  3. You are also able to choose a **Term Entity Type**. You can also choose your own nomenclature. For example, Entity Term Type could provide a way to distinguish between different types of Terms. This makes it easier for you to see the relationship and understand the distinction. It also allows for Terms with the same name but different type. Examples of types might include the Subject Area, Documents, Reports or Domains.
  4. Optionally, if you want to add your new Term to existing glossaries, for each one of those glossaries:
    1. Write in the **Related Glossaries** text field the name of the glossary.

**Tip:** As you write the name of the glossary, a context menu appears listing existing glossaries. You can click an item in the context menu instead of manually writing the whole name of the glossary.

2. Click **Add** to include the glossaries in the list of related glossaries.

**Note:** Click the  icon to the right-hand side of a glossary in the list under **Related Glossaries** to remove the glossary from the list of related glossaries.

5. Write a **Description** that provides detailed information about the Term, such as its purpose and audience.
  6. Click **Save** to save your new Term.

## See Also

- o [Adding a Term to a Glossary](#)
- o [Associating a Term with Another Term](#)
- o [Deleting a Resource](#)
- o [Glossaries](#) search page

# Linked Terms

Linked Terms allow you to implement Terms in your Glossaries much faster and make use of taxonomies already in use.

A Linked Term is a term associated to an ER Object, taking the name and description from it. Linked Terms are automatically created when a Domain, Model or Submodel ER Object is synchronized. Their properties are populated from the ER Object.

It is possible to create Linked Terms by clicking the option in the [header](#) of the ER Object.



**Note:** Linked Terms can be exported but cannot be imported since they only exist when linked to an object.


## See Also

- [Creating a Term](#)
- [Related Terms subpage](#)

# Matching a Term with ER Objects

ER/Studio Team Server lets you associate any term with ER objects that contain the target term.

To match an existing [term](#) with [ER objects](#):

1. Open the [page of the target term](#). You can [search for it](#).
2. Open the  [Related ER Objects](#) subpage.
3. Open the **Found In** tab. The tab contains a search page, similar to the [ER Objects](#) page.
4. Click **Refresh**.

ER/Studio Team Server finds any ER object that contains the current term in its name or description, and adds it to the **Found In** tab. You can also see matched ER objects in the **View** tab, listed after related ER objects.

In the **Found In** tab, you can click the **Unmatch** button. This will remove the matching of the ER object and it will no longer be listed under the **View** tab. The **Re-Match** button will match ER objects that you manually unmatched.

Clearing the **Auto Match** tick box will disable the Auto Match function and any items that you **Unmatch** will be saved.

## See Also

- o [Matching an ER Object with Terms](#)
- o [Related ER Objects](#) subpage

# Working with ER Objects

ER objects are objects from **ER/Studio Repository** that you can access from ER/Studio Team Server.

To see the details of an ER object, find it and open its [ER object page](#). To find an ER object, you can:

- [Browse your ER objects](#) using the [Model Explorer](#) page.
- [Use the simple search](#).
- [Use the advanced search](#).

## Topics


- [Browsing ER Objects](#)
- [Searching for an ER Object](#)
- [Using the Advanced Search of ER Objects](#)
- [Associating an ER Object with a Term](#)
- [Matching an ER Object with Terms](#)
- [Discussing ER Objects](#)
- [Following ER Objects](#)
- [Adding an Attachment Attribute to ER Objects](#)
- [Configuring Sensitive Data Alerts](#)
- [Working with ER Object Comments](#)
- [Working with ER Object Labels](#)

## See Also

- [Synchronizing with ER/Studio Repository](#)
- [Working with ER Object Comments](#)
- [Working with ER Object Labels](#)
- [ER Objects Search Page](#)
- [ER Object Pages](#)
- [Linked Terms](#)

# Associating an ER Object with a Term

To associate an [ER object](#) with an existing [term](#):

1. Open the [page of the target ER object](#). You can [search for it](#).
2. Open the  [Related Terms](#) subpage.
3. Open the **Relate** tab. The tab contains a search page, similar to the [Terms](#) page.
4. In the list of terms, click **Relate** on the right-hand side of a term to associate it with the current ER object.

## Notes:

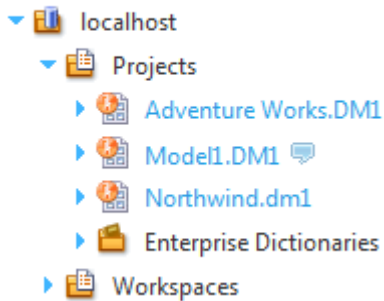
- You can use the search field at the top of the page to filter the list of existing terms.
- You can click **Unrelate** on the right-hand side of a term to break its relation with the current ER object.

## See Also

- [Linked Terms](#)
- [Associating a Term with an ER Object](#)
- [Related Terms](#) subpage

# Browsing ER Objects

## Model Explorer



You can browse the hierarchy of ER objects from the [Model Explorer](#) page.

In this hierarchy, you can expand every ER object too see its content, and you can click any ER object to access its [description page](#), which contain 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.

## See Also

- [Searching for a Resource of a Specific Resource Type](#)
- [Working with ER Object Comments](#)
- [Working with ER Object Labels](#)
- [ER Object Pages](#)
- [Overview of Data Synchronization](#)

# Configuring Sensitive Data Alerts



Header of an ER object that matches two alert conditions.

You can configure [security properties](#) and [attachments](#) so that **ER/Studio Team Server** displays custom alerts on the header of the [pages of ER objects](#) bound to those security properties and attachments, or that have a specific value for those.

This feature lets you warn about sensitive data. For example, you can show a message on any ER object bound to a certain [security property](#) with a value of "High", and describe in the alert the risks of not keeping the ER object information confidential.

To configure these sensitive data alerts, you must [define alert conditions](#) using the [Alerts](#) page of the target [security property](#) or [attachment](#).

## Topics



- [Adding a Sensitive Data Alert Condition](#)
- [Editing a Sensitive Data Alert Condition](#)
- [Deleting a Sensitive Data Alert Condition](#)

## See Also

- [Alerts](#) subpage
- [Object Alerts](#) page

# Adding a Sensitive Data Alert Condition

To add a sensitive data alert condition to a [security property](#) or [attachment](#):

1. Open the [page of the target ER object](#). You can [search for it](#).
2. Open the  **Alerts** subpage.
3. Click **Add New Condition** to add a new alert condition resource to the page.
4. On the new alert condition resource:
  1. On the **Show Alert for Matching** field, select one of the following values:
    - **Bound Object** if you want the alert condition to affect any ER object bound to the current [security property](#) or [attachment](#).
    - **Value** if you want the alert condition to affect any ER object bound to the current [security property](#) or [attachment](#) with a specific value. Enter the target value into the input field on the right-hand side.
  2. Select an **Alert Level**, either **Notice** or **Info**. The alert level determines the icon that **ER/Studio Team Server** shows along with the **Notification Text**.
  3. Enter into **Notification Text** the text of the notification.
  4. From the **Notification Text** field, press  to take the focus out of the field. **ER/Studio Team Server** saves field values as you take the focus out of them.

Your alert condition is now in effect. You can [edit it later](#) or [delete it](#).


## See Also

- o [Editing a Sensitive Data Alert Condition](#)
- o [Deleting a Sensitive Data Alert Condition](#)
- o [Alerts](#) subpage

# Deleting a Sensitive Data Alert Condition

There are two methods of deleting an existing sensitive data alert condition:

Option 1:

1. Open the [page of the security property or attachment that contains the alert condition](#). You can [search for it](#).
2. Open the  [Alerts](#) subpage.
3. Click **Delete Condition** on the target alert condition resource.

Option 2:

1. Go to **My Settings > Admin > Object Alerts** ([super users](#)).
2. On the right of the condition you want to delete, click the blue **Delete** button.
3. Click **OK** on the deletion warning popup.


While [super users](#) can delete any alert condition, [authenticated users](#) can only delete the alert conditions that they create.


## See Also

- o [Adding a Sensitive Data Alert Condition](#)
- o [Editing a Sensitive Data Alert Condition](#)
- o [Alerts](#) subpage

# Editing a Sensitive Data Alert Condition

To edit an existing sensitive data alert condition:

1. Open the [page of the security property or attachment that contains the alert condition](#). You can [search for it](#).
2. Open the  [Alerts](#) subpage.
3. Locate and modify the target alert condition resource.

ER/Studio Team Server saves text input field values as you take the focus out of them. After you change a text value, press  or change another option so that ER/Studio Team Server saves your changes.

Alternatively, if you are a [super user](#), you can edit any existing alert condition from the [Object Alerts](#) page.


## See Also

- o [Adding a Sensitive Data Alert Condition](#)
- o [Deleting a Sensitive Data Alert Condition](#)
- o [Alerts](#) subpage
- o [Object Alerts](#) page

# Matching an ER Object with Terms

ER/Studio Team Server lets you associate any ER object with terms that contain the target ER object.

To match an existing [ER object](#) with [terms](#):

1. Open the [page of the target ER object](#). You can [search for it](#).
2. Open the  [Related Terms](#) subpage.
3. Open the **Match** tab. The tab contains a search page, similar to the [Terms](#) page.
4. Click **Refresh**.

ER/Studio Team Server finds any term that is present in the name or the description of the current ER object, and adds it to the **Match** tab. You can also see matched terms in the **View** tab, listed after related terms.

In the **Match** tab, on the right-hand side of the term entries, you can click **Unmatch** to unmatch matched terms, or click **Re-Match** to match terms that you manually unmatched.

## See Also

- o [Matching a Term with ER Objects](#)
- o [Related Terms](#) subpage

# Using the Advanced Search of ER Objects

Using the advanced search you have more control of the search than with any other search box in ER/Studio Team Server.

Using the advanced search, you can:

- Specify that the property value starts with, contains, ends with, or is an exact match to the text.
- Set filters to include or exclude results based on modification dates and specific ER object types.
- Set how you want the search results sorted.
- Specify the number of results to display per page.

## Topics

- [Searching for an ER Object Using the Advanced Search](#)
- [Saving Favorite Searches](#)
- [Sending Searches By Email](#)
- [Writing an Advanced Search String](#)

## See Also

- [Advanced Search](#) page

# Searching for an ER Object Using the Advanced Search


To perform an advanced search:

1. Open the [Advanced Search](#) page.
2. In the **Search Text** field, enter a [valid search string](#).
3. Check "Include matches for similar-sounding words" to search for text that sounds like the search text.
4. In the **Filters** field, select any of the available options:
  - **All**. Search for any ER object.
  - **Data**. Search only for **ER/Studio Data Architect** objects.
  - **Business**. Search only for **ER/Studio Business Architect** objects.
5. In the **Modification** area, you can define a specific period of time and user. The search results only contain ER objects modified by the specified user during the specified period of time.
  1. In the **Modified** field, select a period of time. Select "anytime" not to restrict results by their last modification date.
  2. In the **By** field, enter the name of a user. Leave the field empty not to restrict the results to those modified by a specific user.
2. In the **Object Type** area, you can select the ER object types that you want to include in the search. To select multiple items in the list, hold the **Ctrl** key and click the target items. To not filter by ER object type, check the **All** option.
3. In the **Property** area, you can define pairs of properties and values that must match in the search results. To add a property-value pair to filter the search results:
  1. In the **Name** field:
    1. Click the ellipsis button. ER/Studio Team Server displays a list of properties.
    2. Select the target object type in the **Highlight properties for** combo box.
    3. Click the target property from the list of properties.
  2. In the **Value** field, enter a valid value for the selected property. This will limit the search results to ER objects where the selected property has this value.

3. Optionally, click ☒ on the left-hand side of the **Name** and **Value** fields to indicate that this is an mandatory inclusion search criteria.

**Notes:**

- If you do not click ☒ the search string is considered optional, and not required for a match.
- Click ☐ to exclude the specified property-value pair from the search results.

If you need additional property-value fields, click the  button on the right-hand side of the first set of **Name** and **Value** fields.

4. In the **Sorting** combo box, you can select a field to sort the search results.
5. In the **Pagination** combo box, you can select the number of results to show per page.
6. Click **Search**. The [Advanced Search](#) page reloads to show the search results.

The results of the advanced search are displayed by default in HTML format. To view the results in table format, click **View as table** at the top left-hand side of the [results results page](#).

At the bottom of the [search results page](#) you can specify a different search criteria, and search again to further refine your search.

## See Also

- o [Writing an Advanced Search String](#)
- o [Saving Favorite Searches](#)
- o [Advanced Search](#)

# Saving Favorite Searches

After completing and running an [advanced search](#), you can name and save the search for later use.

To save an advanced search as favorite:

1. [Perform an advanced search](#).
2. After ER/Studio Team Server loads the search results, click the ★ icon in the [results header](#).
3. On the **Add to favorite** dialog box that opens:
  1. Enter a descriptive **Name** for your search.
  2. Optionally, write a **Description** that provides additional details that would not fit the search name.
  3. Optionally, check the **Shared** checkbox to make your new favorite search public, so that any other user can access your search from the [Favorite Searches](#) page. If you leave this option unchecked, only you can access your new favorite search from the [Favorite Searches](#) page.

After you save your new [advanced search](#) as favorite, you can find it in the [Favorite Searches](#) page. If you are a [non-social user](#), you can find your favorite searches in the [Home](#) page as well.


In addition to the search text, saved searches include the ordering and filter settings.

## See Also

- [Using the Advanced Search of ER Objects](#)
- [Favorite Searches](#) page
- [Search Results](#) page
- [Home \(non-social\)](#) page

# Sending Searches By Email

If emailing search results [is enabled](#), follow these steps to send an advanced search for [ER objects](#) by email:

1. [Perform the advanced search](#).
2. On the [results page](#), click .
3. On the **Email Search Results** dialog box that opens:
  1. Specify in **To** an email address of the recipient.
  2. Use the **Rows** combo box to choose the maximum number of results that the message should include.
  3. Click **Submit** to send the message.

## See Also

- o [Using the Advanced Search of ER Objects](#)

# Writing an Advanced Search String

Search strings in ER/Studio Team Server:

- Are not case-sensitive. For example, you get the same results when you search for *good*, *Good* or *gOOd*.
- Support quoting text to match exact phrases. For example, "*good idea*" matches *good idea*, but not *idea good* or *good or bad idea*.
- Support [logic operators](#): OR, AND.
- Support [making mandatory or excluding words](#).
- Support [wildcard characters](#): \*, ?.
- Support [the similarity and proximity character](#): ~.

To use special characters as normal characters, such as using \* as an asterisk and not as a wildcard character, see [Escaping Special Characters](#).

## Using Logic Operators

You can use **OR** or **AND** in your search strings:

- **OR** matches if there is a match for any of the expressions at each side of the **OR** keyword. For example, searching for *good OR idea* returns the combination of the results of searching for *good* and the results of searching for *idea*: *good*, *idea*, *good idea*.
- **AND** matches if there is a match for both expressions at each side of the **AND** keyword. For example, searching for *good AND idea* returns only the results that are among both the results of searching for *good* and the results of searching for *idea*: *good idea*, but not *good* or *idea*.

## Making Mandatory or Excluding Words

By default, a match for a word is optional. The + and - symbols, used at the beginning of a word, change that:

- + makes the word mandatory. For example, *+apples oranges* matches *apples and oranges*, *apples*, but not *oranges*.
- - excludes the word. For example, *-apples oranges* matches *oranges*, but not *apples* or *apples and oranges*.

## Using Wildcard Characters

When searching ER/Studio Team Server, you can use the asterisk (\*) and the question mark (?) wildcard characters. This is how they work:

- \* represents 0 or more characters. For example, **t\*s** matches **tsunami**, **test** or **this**.
- ? represents a single character. For example, **a?h** matches **agh** or **athletic**, but not **ah** or **argh**.

**Note:** The first character in a search string cannot be a wildcard character.

## Using the Similarity and Proximity Character

Using ~ at the end of a word matches similar words as well. For example, *land~* matches *land*, *sand* and *band*.

Using ~ at the end of a quoted string, followed by a positive integer, matches results where the words within the string are within the specified number of words of each other. For example, "diagram update"~10 matches ER objects where *diagram* and *update* appear within 10 words of each other.

## Escaping Special Characters

ER/Studio Team Server search features are powered by [Apache Solr](#). There are some special characters that you must escape within a search string to use them as normal characters: + - && || ! ( ) { } [ ] ^ " ~ \* ? : \.

To use a special character as a normal character in a search string, you must escape the special character. To escape a special character, write a backslash (\) before the wildcard character in the search string. For example, searching for *ABC\\*DEF\?GHI* matches the literal term *ABC\*DEF?GHI*.

## See Also

- [Search Pages](#)
- [Using the Advanced Search of ER Objects](#)
- [Advanced Search](#)

# Working with ER Object Comments

ER/Studio Team Server lets you [access the comments](#) that ER/Studio Repository users leave in [ER objects](#).

When you use a [non-social user account](#), you can also [watch ER objects for new comments](#), to receive an email whenever another user of ER/Studio Team Server or ER/Studio Repository adds a comment to the watched ER object.

Additionally, if your **ER/Studio Team Server** installation does not have any license for [Connect user connections](#) (so it is not possible for any user to log in as a [social user](#)), you can [add](#) and [delete](#) comments from ER/Studio Team Server.

## Topics

- o [See the Comments to an ER Object](#)
- o [Watching ER Objects for New Comments](#)
- o [Adding a Comment to an ER Object](#)
- o [Deleting a Comment from an ER Object](#)

## See Also

- o [Working with ER Object Labels](#)

# Adding a Comment to an ER Object

If your **ER/Studio Team Server** installation does not have a license for [Team Server user connections](#) (so it is not possible for the user to log in as a [social user](#)), you can add comments to [ER objects](#) from ER/Studio Team Server.

Comments let you describe the purpose of ER objects, and highlight certain features to which you want to draw attention. For example, you may want to use comments to provide feedback to the author of the model.



**Note:** Only [non-social](#) users can add comments following the instructions described in this page. If you have a [social user](#) profile, you can add comments using the [Discussions Tab](#) at the [navigation sidebar](#), as explained in [Starting a Discussion about a Resource](#). For more information, see [Using Social Features](#).

To add a comment to an ER object:

1. Go to the [description page of the target ER object](#).
2. Expand the **Comments** section, at the bottom of the page.
3. Click **Add comment**. A text field and two buttons appear.
4. Write your comment in the text field.
5. Click **Add** to add your comment to the ER object.

Your comment is added to the target ER object description page, where any other [non-social user](#) can see it.

[Super users](#) can configure ER/Studio Team Server so that your comments are not published until a super user reviews them. In that case, you receive the following message after you write a comment to an ER object:

"Comment added. It will be viewable once the moderator has approved it."

For more information, see [Comment Moderation Page](#).




**Note:** When you [synchronize ER/Studio Team Server with ER/Studio Repository](#), comments are synchronized as well. Synchronization works both ways: comments in ER/Studio Team Server become available in **ER/Studio Data Architect** or **ER/Studio Business Architect**, and comments in **ER/Studio Data Architect** or **ER/Studio Business Architect** become available in ER/Studio Team Server.

## See Also

- o [Watching ER Objects for New Comments](#)
- o [Deleting a Comment from an ER Object](#)
- o [See the Comments to an ER Object](#)

# Deleting a Comment from an ER Object

You can delete your own comments or, if you are a [super user](#), you can delete any comment. To delete a comment:


1. Go to the [description page of the target ER object](#).
2. Expand the **Comments** section, at the bottom of the page.
3. Click the  button on the right-hand side of the comment box.
4. When asked for confirmation, click **OK** to delete your comment.

## See Also

- o [Adding a Comment to an ER Object](#)

# See the Comments to an ER Object

To see the comments to an ER object, do either of the following:

- In the [Model Explorer](#) page, click the  icon to the right-hand side of the target ER object. The [Comments](#) page opens with the comments associated with the target ER object.
- If your **ER/Studio Team Server** installation does not have any license for [social user connections](#), you can also go to the [description page of the target ER object](#) and expand the **Comments** section.


## See Also


- [Adding a Comment to an ER Object](#)
- [Watching ER Objects for New Comments](#)

# Watching ER Objects for New Comments

When you watch an [ER object](#) for new comments, ER/Studio Team Server sends you an email notification when someone posts a new comment on the ER object.

To start watching an ER object for new comments:

1. Open the [page of the target ER object](#). You can [search for it](#).
2. Click , on the top-right corner, to start watching the target ER object.

**Note:** If the icon on the top-right is , you are already watching the target ER object.

Remember to [configure the email address](#) where you want to receive updates about new comments on the target ER object.

## See Also

- o [Changing Your Email Address for Notifications](#)
- o [Adding a Comment to an ER Object](#)
- o [See the Comments to an ER Object](#)
- o [Following Resources](#)

# Working with ER Object Labels

If your **ER/Studio Team Server** installation does not have any license for [social user connections](#) (so it is not possible for any user to log in as a [social user](#)), you can [use labels](#) to organize your ER objects or to mark them somehow. For example, you can label a set of ER objects that have something in common, so that you can later find them easily.

To see the labels associated with an ER object, go to the [description page of the target ER object](#) and expand the **Labels** section.

## Topics

- [Editing the Labels of an ER Object](#)

## See Also


- [Working with ER Object Comments](#)

# Editing the Labels of an ER Object

To edit the labels associated with an ER object:

1. Go to the [description page of the target ER object](#).
2. Expand the **Labels** section, towards the bottom of the page.
3. Click **Add labels** or **Edit labels**. It is the same action, the name depends on whether or not there are labels associated with the current ER object already.
4. You are now in edit mode. Now you can add and remove labels to the current ER object.
5. When you are finished editing the ER object labels, click **Done** to save the changes.

When you are in edit mode:

- You can enter a label in the text field and click **Add** to associate the entered label with the current ER object.
- Under the text field, you can see a list of existing labels from other ER objects (if any). Click a label from the list to associate it with the current ER object.
- To remove a label from the current ER object, click the  button to the right-hand side of the target label.

# Working with Data Sources

Data sources are sets of data that define how to establish a connection to a specific database.

## Topics


- [Creating a Data Source](#)
- [Data Source Fields for a Specific Database Management System](#)
- [Searching for a Data Source](#)
- [Editing a Data Source](#)
- [Associating a Data Source with an ER Model](#)
- [Associating a Data Source with a Login Credential](#)
- [Discussing Data Sources](#)
- [Following Data Sources](#)
- [Editing the Stewards of a Data Source](#)
- [Adding an Attachment Attribute to Data Sources](#)
- [Deleting a Data Source](#)

## See Also

- [Data Sources search page](#)
- [Data Source Pages](#)
- [Login Credentials](#)

# Associating a Data Source with an ER Model

To associate a [Data Source](#) with an [ER Model](#):

1. Open the ER Objects page from the Navigation bar. In the left Navigation Bar, filter by *Models*.
2. Click on the Model that you would like to associate with the Data Source.
3. Open the  [Related Data Sources](#) subpage.
4. Open the **Relate** tab. The tab contains a search page, similar to the [ER Objects](#) page.
5. In the list of Data Sources, click **Relate** on the right side of a Data Source to associate it with the current ER Model.

## Notes:

- You can use the search field at the top of the subpage to filter the list of existing Data Sources.
- You can click **Unrelate** on the right side of a Data Source to break its relation with the current ER Model.

## See Also

- [Creating a Data Source](#)
- [Data Sources](#) search page

# Associating a Data Source with a Login Credential

The **Related Data Sources** subpage of [Login Credentials](#) lists the [Data Sources](#) that are either related to the current Login Credential, or that can be related to the [Login Credential](#).

You can use the **Related Data Sources** page to relate or unrelate Data Sources to the current Login Credential.

The page is divided in two tabs:



## View Tab

The [View Tab](#) displays a list of related Data Sources. The list shows the Data Sources currently related to the selected Login Credential.



## Relate Tab

The [Relate Tab](#) allows you to relate and unrelate Data Sources to the current Login Credential.

The **Relate** tab contains a list of Data Sources that can be related to the Login Credential. The list is arranged with alphabetical navigation and contains a search box.

On the right side of the Data Sources entries, you can click **Relate** to relate a Data Source to the current Login Credential, or you can click **Unrelate** to unrelate the target Data Sources from the current Login Credential.

## See Also

- [Data Source Pages](#)

## Associating a Data Source with a Login Credential

- [Login Credential Pages](#)
- [Working with Login Credentials](#)

# Creating a Data Source

To create a [data source](#):

1. Select [Data Sources](#).
2. Click the **New Data Source** button on the upper-right corner.
3. On the **New Data Source** dialog box that opens:
  1. Enter a **Name** for your new data source. Names of data sources in ER/Studio Team Server must be unique.
  2. Select from the **Type** combo box the database management system (DBMS) that stores the database.
  3. Fill the fields after the **Type** field and before the **Custom Properties** field. These fields change depending on the selected DBMS **Type**. See [Data Source Fields for a Specific Database Management System](#).
  4. Optionally, under **Custom Properties**, you can define custom properties for the data source. For each property:
    1. Enter the **Name** of the property.
    2. Enter the **Value** for the property.
    3. Click **Add** to add the defined property-value pair to the list of properties of the data source.
  5. Write a **Description** that provides detailed information about the data source, such as its purpose and audience.
  6. Click **Save** to save your new data source.

## See Also

- o [Deleting a Resource](#)
- o [New Data Source](#) dialog box

# Data Source Fields for a Specific Database Management System

The following tables provide details about the data source fields that are specific to a database management system: [DB2 LUW](#), [DB2 z/OS](#), [InterBase](#), [Firebird](#), [JDBC](#), [MySQL](#), [ODBC](#), [Oracle](#), [SQL Azure](#), [SQL Server](#), [Sybase](#), [Sybase IQ](#).

You can access these fields when you [create a data source](#) or when you access the [description page](#) of an existing data source.

## DB2 LUW

Item	Description
Use DB2 client aliases	Check <b>Enable</b> to allow using DB2 client aliases.
Host Name	IP address or host name of the database server.
Port	Network port where the database server is listening.
Remote DB Name	Name of the target database.
Schema ID	Identifier of the target schema.
Functional Path	The functional path.
OS Authentication	Check <b>Enable</b> to log in to the database with the credentials of a user of the operating system where DB2 LUW is running.

## DB2 z/OS

Item	Description
Use DB2 client aliases	Check <b>Enable</b> to allow using DB2 client aliases.
Host Name	IP address or host name of the database server.
Port	Network port where the database server is listening.
Remote DB Name	Name of the target database.
Schema ID	Identifier of the target schema.
Functional Path	The functional path.
OS Authentication	Check <b>Enable</b> to log in to the database with the credentials of a user of the operating system where DB2 z/OS is running.

## InterBase

Item	Description
Host Name	IP address or host name of the database server.
Port	Network port where the database server is listening.
Character Set	Character set of the database.
Dialect	Dialect of the database.
Role	Role to access the database.
Database file path	Path to the database file.

## Firebird

Item	Description
Host Name	IP address or host name of the database server.
Port	Network port where the database server is listening.
Character Set	Character set of the database.
Dialect	Dialect of the database.
Role	Role to access the database.
Database file path	Path to the database file.

## JDBC

Item	Description
Connection URL	URL to connect to the database.

## MySQL

Item	Description
Host Name	IP address or host name of the database server.
Port	Network port where the database server is listening.
Default Database	Name of the target database.
Windows Authentication	Check <b>Enable</b> to use native Windows authentication to connect to the target database.

## ODBC

Item	Description
Use DSN	Check <b>Enable</b> to use DSN to connect to the target database.
Connection String	String that defined how to connect to the target database.

## Oracle

There are four different ways you can connect to an Oracle database. Use the **Use** combo box to select the system you want to use: [Alias](#), [Connect Descriptor](#), [SID](#), [Service Name](#).

## Connecting to Oracle with Alias

Item	Description
TNSNames.ora Alias	Alias to connect to the database.
Instance Name	Name of the database instance.
Role	Role to connect to the database.
Windows Authentication	Check <b>Enable</b> to use native Windows authentication to connect to the target database.

## Connecting to Oracle with Connect Descriptor

Item	Description
Connect Descriptor	Description of the connection to the database.
Instance Name	Name of the database instance.
Role	Role to connect to the database.
Windows Authentication	Check <b>Enable</b> to use native Windows authentication to connect to the target database.

## Connecting to Oracle with SID

Item	Description
Host Name	IP address or host name of the database server.
SID	Oracle system identifier that uniquely identifies the target database.
Port	Network port where the database server is listening.
Instance Name	Name of the database instance.
Role	Role to connect to the database.
Windows Authentication	Check <b>Enable</b> to use native Windows authentication to connect to the target database.

## Connecting to Oracle with Service Name

Item	Description
Host Name	IP address or host name of the database server.
Service Name	Service name that identifies the target database.
Port	Network port where the database server is listening.
Instance Name	Name of the database instance.
Role	Role to connect to the database.
Windows Authentication	Check <b>Enable</b> to use native Windows authentication to connect to the target database.

## SQL Azure

Item	Description
Host Name	IP address or host name of the database server.
Default Database	Name of the target database.

## SQL Server

Item	Description
Host Name	IP address or host name of the database server.
Port	Network port where the database server is listening.
Protocol	Protocol to use for the network connection. You can choose any of the following options: <ul style="list-style-type: none"> <li>○ <b>TCP/IP</b> (default). Standard network protocol.</li> <li>○ <b>Name Pipes</b>. Windows-specific network protocol.</li> </ul>
Encryption	Check <b>Enable</b> to encrypt the network communication.
Default Database	Name of the target database.
Packet Size	Size of the network packets.
Windows Authentication	Check <b>Enable</b> to use native Windows authentication to connect to the target database.

## Sybase

Item	Description
Use Sybase SQL.INI aliases	Check <b>Enable</b> to use Sybase SQL.INI aliases.
Host Name	IP address or host name of the database server.
Port	Network port where the database server is listening.
Encryption	Check <b>Enable</b> to encrypt the network communication.
Default Database	Name of the target database.
Packet Size	Size of the network packets.
Max Connections	Maximum number of connections that can be established.
Character Set	Character set of the database.
Kerberos Authentication	Check <b>Enable</b> to use the Kerberos network authentication protocol to connect to the target database.

## Sybase IQ

Item	Description
Host Name	IP address or host name of the database server.
Port	Network port where the database server is listening.
Database	Name of the target database.
Windows Authentication	Check <b>Enable</b> to use native Windows authentication to connect to the target database.

## See Also

- o [Creating a Data Source](#)
- o [Data Source Description](#) page

# Working with Login Credentials

Login Credentials are security containers that store and manage passwords for accessible Data Sources from ER/Studio Team Server. Login Credentials contain an alias that identifies the credential for sharing.

Only users with Update/Delete permission on Data Sources are able to edit Login Credentials. Any password changes are invisible for common users.

To see the details of an Login Credentials, [browse to it](#) and open the corresponding [Login Credential page](#).



**Note:** Only **Team Server DBArtisan Edition** licenses will show this feature

## Topics

- [Creating Login Credentials](#)
- [Editing Login Credentials](#)
- [Deleting Login Credentials](#)
- [Browsing Login Credentials](#)
- [Associating a Login Credential with a Data Source](#)

## See Also

- [Login Credential Pages](#)
- [Login Credentials Search Page](#)
- [Data Sources](#)

# Creating Login Credentials

To create a [Login Credentials](#):

1. Select the Data Sources search page and then select **Related Login Credentials** on the left-hand sidebar.
2. Click the **New Login Credentials** button on the upper-right corner.
3. On the **New Login Credentials** dialog box that opens:
  1. Define the **Name** of your new Login Credential.
  2. Choose the type of authentication you prefer:
    - Type the **User Name**. User Name is a login name for a [Data Source](#). Then enter and confirm the **Password**. The password that allows access to the Data Source. For platforms that may not require a password such as Sybase, this field may be left empty.
    - Select **OS Authentication**. This option disables **Name**, **Password** and **Confirm Password** fields since the information will be read from the current OS login. **Trusted Host** field appears.



**Note:** Include the name of the host in **Trusted Host** in case your server requires it. If you do not include it when necessary, **ER/Studio Team Server** will show the exception that your database server provides


3. Define a **Role** for the Login Credential.
4. Write a **Definition** that provides detailed information about the Login Credential, such as its purpose and users group.
5. Click **Save** to save your new Login Credential.

## See Also

- [Associating a Login Credential with a Data Source](#)
- [Deleting Login Credential](#)
- [Login Credentials Search page](#)

# Editing a Resource

To edit a [glossary](#), a [term](#), or a [data source](#):

1. Open the [page of the target resource](#). You can [search for it](#).
2. Open the  **Description** subpage.
3. Click **Edit** to enter the edit mode. In edit mode, the **Description** page provides fields to define the values of each property of the target resource.
4. Modify the resource properties.

**Tip:** For information about the fields that you can edit, check the documentation of the description page of the type of resource that you are editing: [glossary](#), [term](#), or [data source](#).

5. To save your changes, click **Save** at the end of the page.



**Note:** To automatically update any matched items to the edited changes, the Auto Match tick box on the **Found In** tab must be enabled.

## See Also

- [Editing the Stewards of a Resource](#)
- [Working with Glossaries](#)
- [Working with Terms](#)
- [Working with Data Sources](#)

# Deleting Login Credentials

You can delete a [Login Credential](#) if you have proper permissions or if you are a [super user](#).

To delete a Login Credentials from ER/Studio Team Server:

1. Open the [page of the target Login Credential](#). You can [search for it](#).
2. On the [Login Credential page](#), click **[Delete]** on the header.
3. On the confirmation dialog box that opens, click **OK**.

The target Login Credential is not available anymore in ER/Studio Team Server.

**Note:** Deleting a Login Credential does not delete the [Data Source](#) associated with it.

## See Also

- o [Creating Login Credentials](#)
- o [Related Login Credentials](#)

# Browsing Login Credentials

To search for Login Credentials:

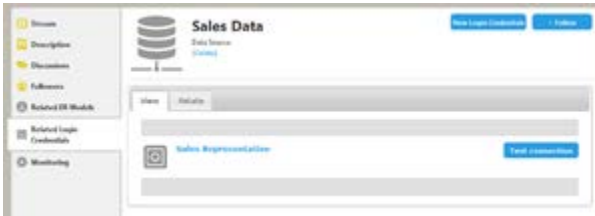
1. Select the [Data Sources](#) search page and then select Login Credentials on the left-hand sidebar.
2. Enter your search Login Credentials in the search field.

As soon as you stop typing, **ER/Studio Team Server** filters the list of Login Credentials and displays only the ones that meet your search criteria. Click their name to open their [resource page](#).

## See Also

- o [Search Pages](#)

# Related Login Credentials



The **Related Login Credentials** subpage of [Data Sources](#) lists the [Login Credentials](#) that are either related to the current Data Source, or that can be related to the [Data Source](#).

You can use the **Related Login Credentials** page to relate or unrelate Login Credentials to the current Data Source.

The page is divided in two tabs:

## View Tab

The [View Tab](#) displays a list of related Login Credentials. The list shows the Login Credentials currently related to the selected Data Source. From here you can **test connection** to the current Data Source with each related Login Credential .



## Relate Tab

The [Relate Tab](#) allows you to relate and unrelate Login Credentials to the current Data Source.

The **Relate** tab contains a list of Login Credentials that can be related to the Data Source. The list is arranged with alphabetical navigation and contains a search box.

On the right side of the Login Credentials entries, you can click **Relate** to relate a Login Credential to the current Data Source, or you can click **Unrelate** to unrelate the target Login Credential from the current Data Source.

## See Also

- [Data Source Pages](#)

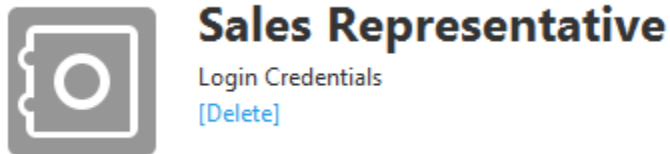
# Login Credential Pages

Login Credential pages provide information about them: Description and Related Data Sources.

To open a Login Credential page, follow a Login Credential link. If you are looking for a specific Login Credential, you can use the [Login Credentials Search page](#).

Login Credentials pages share a [common header](#), and they also share a [common sidebar](#). When you click the items in the sidebar, you get access to information pages about different aspects of the target Login Credential.

## Login Credentials Pages Header






The Login Credential header shows:

- The Login Credential icon.
- The name of the Login Credential.
- The type of resource ("Login Credentials").
- If you have proper permissions or if you are a [super user](#), you can click **[Delete]** to [delete the Login Credential](#).

## Login Credentials Pages Sidebar

Login Credentials pages provide a sidebar with the following items:

Item	Description
 <a href="#">Description</a>	Provides detailed information about the Login Credential.
 <a href="#">Related Data Sources</a>	Shows a list of data sources that are associated with the current Login Credential .
 <a href="#">Permissions</a>	Opens the users and groups permissions tab for the login credential.

## See Also

- [Working with Login Credentials](#)

# Working with Groups

Groups are designed as a shortcut to get in touch with other elements. It also allows you to have related elements concentrated in one place.

When you [create a group](#), you become its owner. You can then [include](#) in your group different types of resources. To see the details of an existing group, [find it](#) and open its [group page](#).

## Topics

- [Creating a Group](#)
- [Searching for a Group](#)
- [Editing a Group](#)
- [Including Data Sources into a Group](#)
- [Discussing Groups](#)
- [Following Groups](#)
- [Editing the Stewards of a Group](#)
- [Deleting a Group](#)
- [Manage Permissions for a Group](#)

## See Also

- [Group Pages](#)
- [Working with Resources](#)

# Creating a Group

To create a [group](#):

1. Select [Data Sources](#).
2. Click the **New Group** button on the upper-right corner.
3. In the [New Group](#) dialog box that opens:
  1. Enter a **Name** to identify your new group.
  2. Define the **Status** of the group using nomenclature you decide upon. You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", and "Deprecated".
  3. Write a **Definition** that provides detailed information about the group, such as its purpose and audience.
  4. Click **Save** to save your new group.

## See Also

- [Including Data Sources into a Group](#)
- [Deleting a Group](#)
- [New Group Dialog Box](#)

# Including Data Sources into a Group

To include a [Data Source](#) into an existing [group](#):

1. Open the [page of the target group](#). You can [search for it](#).
2. Open the [Included Data Sources](#) subpage.
3. Open the **Include** tab.
4. In the list of existing data sources, click **Include** on the right-hand side of a resource to include it into the group.

## Notes:

- You can use the search field at the top of the page to filter the list of existing resources.
- You can click **Exclude** on right-hand side of a resource to remove the resource from the current group.

## See Also

- o [Creating a Group](#)

# Working with Apps

Apps allow you to create your own functional applications within **ER/Studio Team Server**.

When you [create an App](#) you become its owner. Only you or a [super user](#) can [edit](#) or [delete](#) the application. To see the details of an existing application, [find it](#) and open its [App page](#).

## Topics

- [Creating an App](#)
- [Searching for an App](#)
- [Editing an App](#)
- [Discussing Apps](#)
- [Following Apps](#)
- [Editing the Stewards of an App](#)
- [Deleting an App](#)

## See Also

- [Apps search page](#)
- [App Pages](#)

# Creating an App

To create an [App](#):

1. Select [Apps](#).
2. Click the **New App** button on the upper-right corner.
3. In the **New App** dialog box that opens:
  1. Enter a **Name** to identify your new app.
  2. Define the **Status** of the app using nomenclature you decide upon. You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", and "Deprecated".
  3. Write a **Definition** that provides detailed information about the app, such as its purpose and audience.
  4. Click **Save** to save your new app.

Now you can add script to your app using the [Server Code](#) link on the left navigation bar.

## See Also

- o [Apps](#)
- o [Developer Guide](#)

# Troubleshooting

Here you can find a list of some frequently encountered problems and their solutions or workarounds.

Most problems can be fixed by making sure that your system is running the latest software. Before you start troubleshooting, it is advised that you make sure your product is up to date.

## Cannot Connect to ER/Studio Team Server

### Unable to Connect

If your web browser cannot establish a connection to the **ER/Studio Team Server** server:

- o Check that the URL you are trying to access is ER/Studio Team Server's.
- o Check that your system has a working connection to the ER/Studio Team Server server.
- o Check that ER/Studio Team Server is running. See [Starting ER/Studio Team Server](#).
- o Try increasing the maximum memory assigned to ER/Studio Team Server. See [Changing the Memory Limit of ER/Studio Team Server](#).

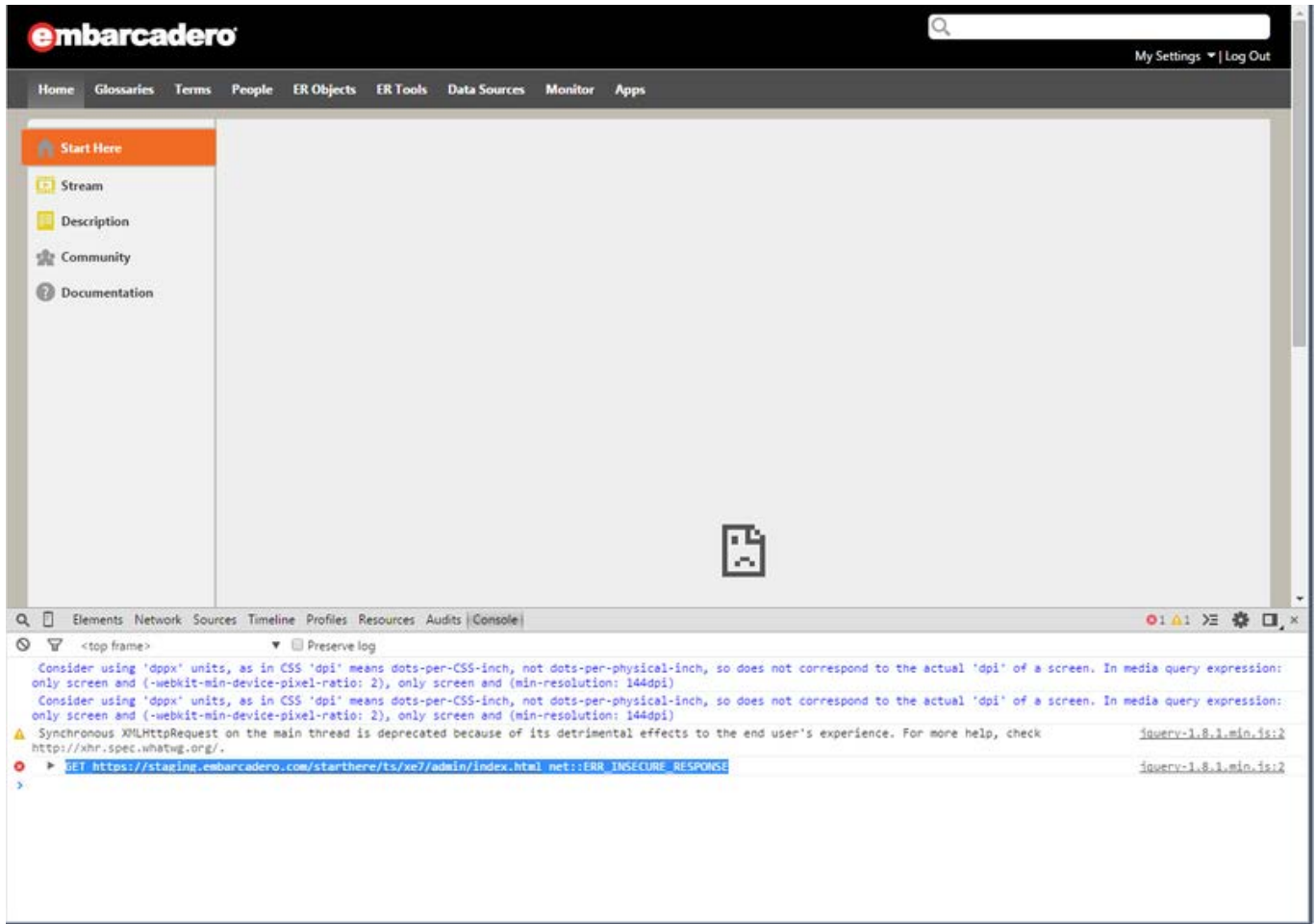
### Template Could Not be Loaded

"Template could not be loaded..."

If you get this error message, you might need to [restart the ER/Studio Team Server server](#). Contact your super user.

## ER/Studio Team Server is not showing the Start Here page

**Start Here** page may be not shown first time you access to home page using https connection. To solve this and obtain the certificate open <https://www.embarcadero.com> on the same browser and then refresh **ER/Studio Team Server** home page.



## Loading Pages Takes Too Much Time

Try increasing the maximum memory assigned to **ER/Studio Team Server**. See [Changing the Memory Limit of ER/Studio Team Server](#).

## Log Error Messages

There are some log files in the **ER/Studio Team Server** installation folder that you can watch for error messages and warnings. Here you can see some errors that you might see registered in those log files, what the errors mean, and how to solve them.

`tomcat\logs\<domain>.<date>.log`

`java.lang.OutOfMemoryError: Java heap space`

You need to increase the maximum memory assigned to **ER/Studio Team Server**. See [Changing the Memory Limit of ER/Studio Team Server](#).

etlvar\log\log\_<timestamp>\\*.log

<date> - SyncDiagram.bat (stdout) - Could not reserve enough space for object heap

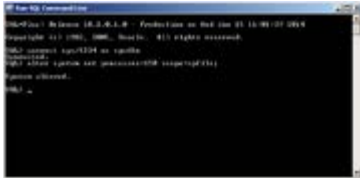
The application cannot start because there is not enough contiguous memory in the system that can be allocated for the application. For example, you are using a virtual machine and have more memory allocated to ER/Studio Team Server than is available on the virtual machine.

You need to decrease the maximum memory assigned to ER/Studio Team Server. See [Changing the Memory Limit of ER/Studio Team Server](#).

## Synchronization Issues

### Oracle

The default number of **processes** that can be set in **Oracle XE** is 40. If you exceed the amount of processes you may get a failure, identified in the synchronization logs as *ORA-12519, TNS:no appropriate service handler found*. The synchronization logs are available in the **installation dir\etlvar** directory.



To fix this error you can increase the number of available **processes** by doing the following:

1. Run SQL\*Plus and login as SYSTEM. You should know what password you've used during the installation of Oracle DB XE.
2. Run the command
- 3.
4. "ALTER SYSTEM SET processes=150 scope=spfile;"
- 5.

in the SQL\*Plus

6. Restart the database.

If you continue to get this error after increasing the number of available processes by following the above procedure, you may be using up all available **processes** and need to source the reason for this by examining the processes.

Connect to your database either using the *sys account* or by logging into your Oracle server and using a direct SQL Plus connection as the Oracle user: sqlplus / as sysdba.



**Note:** If you are still getting errors regarding no available processes, you will have to manually kill one of the Oracle processes using the *kill* command. Then use these two queries to find out how many processes and sessions are currently logged:

```
1 SELECT COUNT(*) FROM v$process;  
2 SELECT COUNT(*) FROM v$session;
```

For Oracle 11g, the default maximum number of processes is 150 (149 available).

Once you have confirmed that you have definitely reached the maximum number of processes, you can use this query to see what they all are and if they are active:

```
1 SELECT sess.process, sess.status, sess.username, sess.schemaname,  
   SQL.sql_text  
2 FROM v$session sess, v$sql      SQL  
3 WHERE SQL.sql_id(+) = sess.sql_id;
```

## See Also

- [Overview of the ER/Studio Team Server Tools](#)
- [Overview of Data Synchronization](#)

# Glossary

Here you can find information about some of the terms that you may run into while you browser the documentation.

## A

### Apache Tomcat

Server technology used by ER/Studio Team Server. [More information.](#)

## B

### Breadcrumb trail

A breadcrumb trail is a structured display of resources where the resource to the left is a parent of the resource to the right.

[Adventure Works.DM1](#) > [Adventure Works](#) > [Contact](#) > [ContactID](#)

 [Model1.DM1](#) >  [Logical](#) >  [Main Model](#)

### Business Reports

This is one of the folders of [shared reports](#) distributed with ER/Studio Team Server. See [Solution Browser, Business Reports](#).

## C

### Connection Types

These are the type of connections that people can use to connect to ER/Studio Team Server. Not to be confused with [user types](#). See [Overview of User Connections](#).

### CRUD

Create, Read, Update, Delete usage relationships.

## D

### Diagram

A graphical presentation of a collection of model elements.

### Digital Certificate

A digital certificate (also known as a public key certificate or identity certificate) is an electronic document that uses a digital signature to bind a public key with identity information. The certificate can be used to verify that a public key belongs to an individual. You can view installed certificates in [Firefox > Options > Advanced Menu](#).



## E

### ETL

**Extraction, Transformation and Load**, a process in data warehousing that involves extracting data from other sources, transforming it to fit business need, and then loading it into an end target, such as the data warehouse.

## L

### Logical Model

A logical entity-relationship model conforms to relational theory and contain only fully-normalized entities. For a logical data model to be normalized, it must include the full population of attributes to be implemented and those attributes must be defined in terms of their domains or logical data types.

A logical data model requires a complete schema of identifiers or candidate keys for unique identification of each occurrence in every entity. The logical model indicates the current identify selection because there are choices of identifiers for many entities.

## P

### Pentaho BI Platform

Architecture and infrastructure to build solutions to business intelligence (BI) problems. ER/Studio Team Server builds its reporting features on top of this platform. [More information.](#)

### Permissions

Gives a user the ability to access the [Reporting Repository database](#). See [Overview of User Roles](#).

### Physical Model

A complete physical data model includes all the database artifacts required to create relationships between tables and achieve performance goals, such as indexes, constraint definitions, linking tables, partitioned tables, and clusters.

## R

### Roles

ER/Studio Team Server provides default roles. These roles are granted permissions to access actions. The default roles are **Authenticated** and **Super User**. See [Overview of User Roles](#).

### Repository

A database where ER/Studio Team Server stores and maintains data. For ER/Studio Team Server, the database, or repository, is associated with the **ER/Studio** application.

## S

### Security

All users are authenticated before they are able to run queries and reports. Each user must have a user name and password that is stored in the **ER/Studio Repository** database.

### Solution

A set of documents defining the processes and activities required to solve a specific business intelligence problem.

### Solution Repository

The Solution Repository is the location where solutions and the metadata they rely on is stored and maintained. Requests made to the platform to have actions executed rely on the action being defined in the Solution Repository.

### Scheduler

Administrative function to schedule and monitor synchronization of the ER/Studio Repository with the Reporting Database. See [Overview of Scheduling](#).

## T

### Technical Reports

This is one of the folders of [shared reports](#) distributed with ER/Studio Team Server. See [Solution Browser, Technical Reports](#).

## See Also

- [What Is ER/Studio Team Server](#)
- [Overview of the ER/Studio Team Server Architecture](#)