



Product Documentation

Embarcadero Team Server XE5

Evaluation Guide

Version 4.0

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October 22, 2014

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INTRODUCTION

ER/Studio Team Server is a model and metadata collaboration platform that provides greater meaning, understanding and context to enterprise data. Database professionals, developers, and business analysts gain better comprehension and compliance using integrated model, metadata & collaboration tools. Team Server's collaborative enterprise glossary brings together the entire organization to foster improved metadata, business definitions, governance, compliance, and security policies. Online models showcase data relationships, while powerful search capabilities help users locate enterprise data with ease.

PRODUCT BENEFITS BY AUDIENCE -

Data Consumers

- Integrate effective data comprehension capabilities in to daily workflows, delivering context and meaning to every user.
- Enable collaboration around data among teams across business units or business functions.
- Support corporate compliance initiatives by driving responsible use of sensitive or private data.

Data Modeling Professionals

- Integrate the glossary's business definitions with internal web assets to provide on-the-fly business context with tool-tips and pop-ups.
- Create a single registry of all available data sources.
- Adhere to industry regulations and business standards regarding security and privacy, by alerting users who view or modify sensitive data within the tools.

Data Management Professionals & Developers

- Develop applications faster by using business terms to easily locate data elements.
- Monitor access to and use of business glossaries and associated functions, to understand immediate data management requirements.

ABOUT THIS GUIDE

This guide is intended to help you get started using Embarcadero's metadata collaboration solution, ER/Studio Team Server, as part of the ER/Studio product family.



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

Should you wish to experience some of the more advanced features in the evaluation, you will be required to configure your installation so that these features can be demonstrated. These sections are highlighted with the 'configuration/tools' icon.



To complete this guide fully, you will need to have versions of ER/Studio Data Architect, Repository and Team Server installed. For more information, an up to date installation guide is available online. Please see <http://docwiki.embarcadero.com> for details.

You will need additional files for this evaluation, they can be found here: [TS Eval Files.zip](#)

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

Part 1 - The basics

- [Getting Started with Embarcadero Team Server](#) on page 4
- [ER/Studio Team Server - Glossaries and Terms](#) on page 5
- [Create a new glossary](#) on page 5
- [Import Glossaries and Terms](#) on page 6
- [Searching for Terms - A Usage Example](#) on page 6
- [Filtering Search Terms](#) on page 7

Part 2 - Set up, Alerts and DB Team Server

- [Setting up for further evaluation](#) on page 8
- [ER/Studio Data Architect Configuration](#) on page 9
- [ER/Studio Team Server Configuration](#) on page 10
- [ER Objects - Viewing Alerts](#) on page 13
- [ER/Studio Team Server - More Features](#) on page 14

Part 3 - Advanced features

- [ER/Studio Team Server - More Features](#) on page 14
- [People](#) on page 14
- [Glossary Tooltips](#) on page 14

GETTING STARTED WITH EMBARCADERO TEAM SERVER

When you first log in to Team Server, you are presented with your personalized home screen.

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

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

The screenshot shows the Embarcadero Team Server home page. It features a top navigation bar with tabs for Home, Glossaries, Terms, People, ER Objects, ER Tools, and Data Sources. A search bar is located in the top right corner. The main content area displays a stream of activity, including posts from users like Jessica, sally, and admin, with options to Like, Reply, Share, Flag, and Delete. A left sidebar contains navigation options: Start Here, Stream, Description, Community, and Documentation. A right sidebar shows a list of users who are following the current user, including sally, Jessica, and frank, and a list of terms being followed, such as 360 Survey, Business Terms, and 401(k) Plan.

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

Easy access to Global Search, Glossaries, Terms, People, ER Objects, ER Tools and Data Sources.

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

ER/STUDIO TEAM SERVER - GLOSSARIES AND TERMS

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

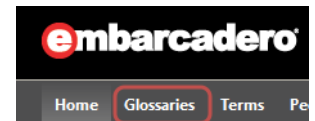
Your Home Page has Streams to keep you informed of any modifications or activity with, for example, ER Objects, Glossaries or Terms that you have an interest in. These are especially useful to keep in touch with any discussions.


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



CREATE A NEW GLOSSARY

- 1 To create a new Glossary, on the top menu bar click on the **Glossaries** tab.



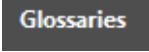


- 2 On the top right of the window, click the  button to open the New Glossary dialog.
- 3 Enter the **Name**, 'My Glossary' and a **Definition** of your choosing.
- 4 Click **Save** to create your new Glossary.

That's it!

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

IMPORT GLOSSARIES AND TERMS



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

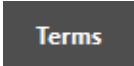
NOTE: You are welcome to choose the *glossaries_full.csv* file, which is a much larger file, packed with Glossaries and Terms available for you to use. Please be aware that it will take a few minutes to import the fully loaded csv file.

- You can download the supplied files here: [TS_Eval_Files.zip](#)

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

SEARCHING FOR TERMS - A USAGE EXAMPLE



- 1 To search for a Term, on the top menu bar *click* on the  tab.
- 2 In the Search Bar, *type* 'Customer'

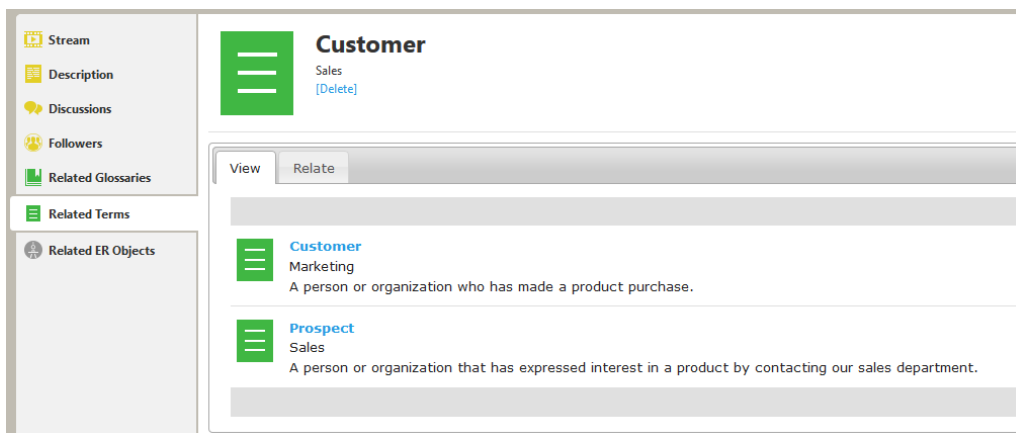
TIP: You will notice that as you type, the search function matches results while you are typing. This makes your time spent looking for items more efficient.

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

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

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

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



FILTERING SEARCH TERMS

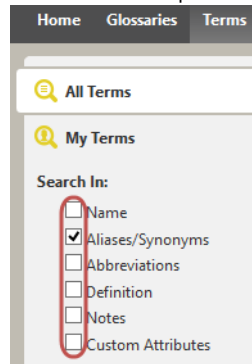
As you have found already, searching for Terms can be simple but powerful. Giving your users the capability to collaborate effectively.

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

SETTING UP FOR FURTHER EVALUATION

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

- 1 Click on **Terms** in the top navigation menu, in the search box, type 'FOS'.
- 2 In the 'Search In' tickboxes, clear all items except Aliases/Synonyms..

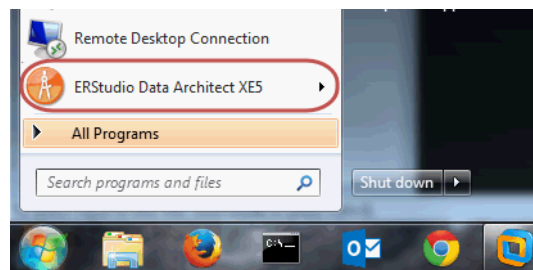


★ Only Factory Outlet Store is remaining from the search results. The **Search In** filters enable you to search not only queries the Term name, but also Aliases/Synonyms, Abbreviations, Definition, Notes (not by default) and Custom Attributes.

SETTING UP FOR FURTHER EVALUATION

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

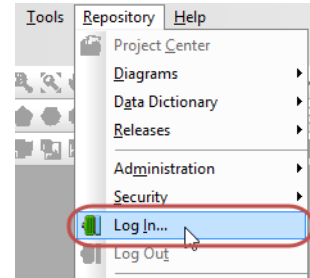
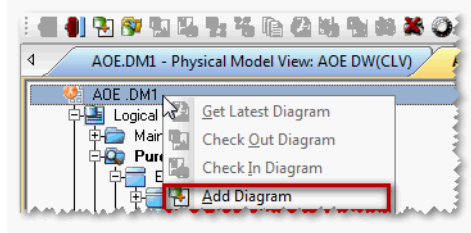
To open ER/Studio in Windows 7, go to **Start > All Programs > ER Studio Data Architect**.



ER/STUDIO DATA ARCHITECT CONFIGURATION



- 1 From your ER/Studio DA program window, **Open** the *AOE.dm1* file which is found with the [evaluation files](#).
- 2 Click the Repository Login in the menu bar Repository > Log In.
- 3 Log in using the name and password that you set during the Repository install.
- 4 In the Data Model Window (the left pane) *right click* the



AOE.dm1 Model icon and from the context menu, click **Add Diagram**. On the Add Diagram options window, click **OK** to add the diagram to the Repository.

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



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

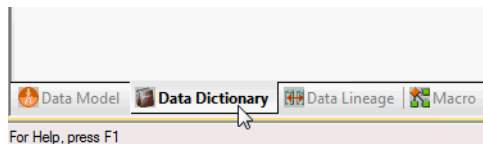
This allows many users to collaborate on a model and *check in* their changes for others to

see. The icons change from a 'locked' padlock , to an open padlock  to show which objects you have checked out. Your model should now have green 'open padlock' icons.

SETTING UP A SENSITIVE DATA ALERT

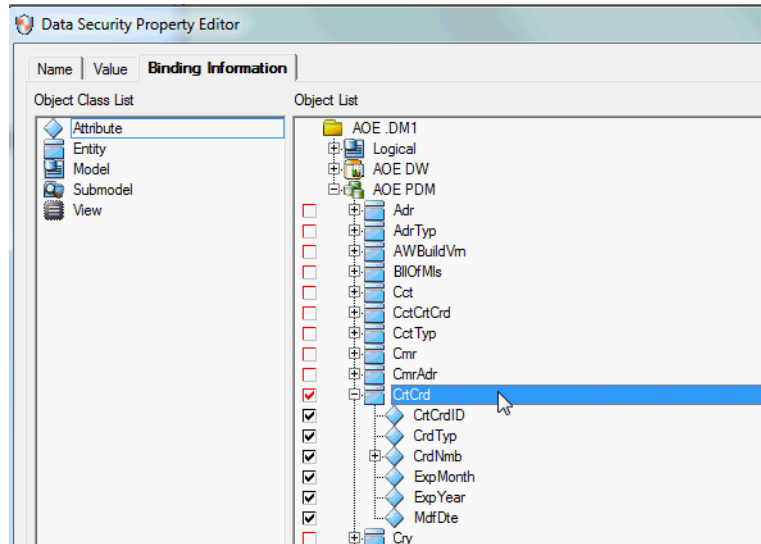


- 6 Click the **Data Dictionary** tab to change the Data Model window to a Data Dictionary



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

- In the **Data Security Property Editor**, change to the **Binding Information** tab and in the **Object Class List**, click on **Attribute**. In the **Object list** pane expand **AOE.DM1 > AOE PDM > CrtCrd**. Select the tickbox for **CrtCrd**, which will include: CrdCrdID, CrdTyp, CrdNmb, ExpMonth, ExpYear, MdfDte.



- Double click **CrdNmb** and set the Value Override as 'Regulated Customer Info'.
- Click OK to close the editor.
- Right click **Data Dictionary > AOE_DD** and click **Check In Data Dictionary**.
- Click OK to sync your changes. Then **Yes** and **OK** in the following pop up windows.

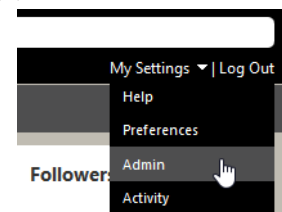
NOTE: You have now bound information to columns in ER/Studio Data Architect.
- Finally, *right click* the **AOE.DM1** in the data model window and choose **Check In Diagram**.

ER/STUDIO TEAM SERVER CONFIGURATION



Now that you have synchronized your ER/Studio model to the Repository, we are going to sync your Team Server with the Repository to view and work with that model data.

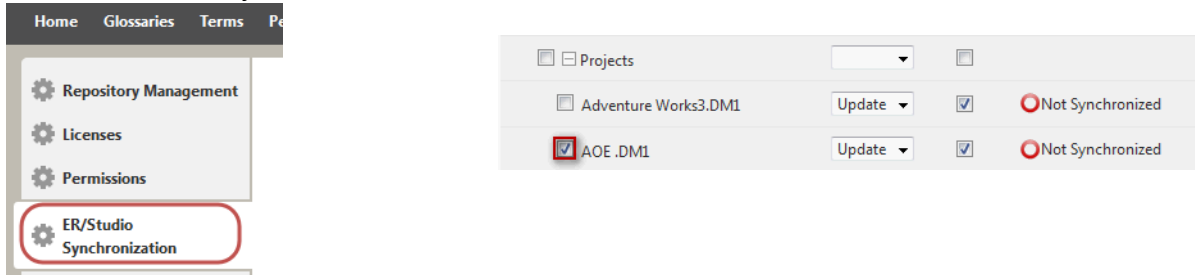
- Log in to Team Server using a web browser and browsing to the server address/port, and username and password that you chose during installation.
- Click the **My Settings > Admin** menu on the right of the top menu bar.



3 In the administration page, you have access to **ER/Studio Synchronization**.

NOTE: To sync with the Repository, you will need to have added a model to the Repository from ER/Studio DA, which is listed on page 9.

4 On the left menu bar, *click* **ER/Studio Synchronization** and then *Click* the tickbox for the AOE.DM1 Project in the main window.



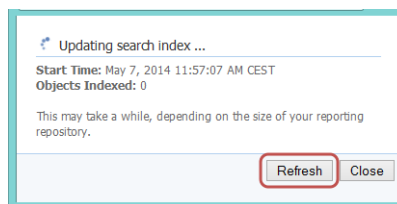
5 From the **Actions** menu, *click* **'Synchronize Selected'** to sync the Repository data to ER/Studio Team Server.

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



7 Once the sync has completed, you will see the status as *Success*. If you would like to check on progress, please click *refresh*.

8 To catalog all of the ER Objects, click **My Settings > Admin > Repository Management > Update Search Index**. You can click **refresh** to check on the progress.

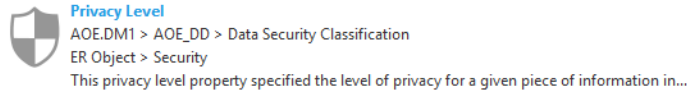


You have now synchronized the Repository data across to your Team Server installation!

ER/STUDIO TEAM SERVER CONFIGURATION - ADDING AN ALERT



- 1 To set up an Alert, Click on the ER Objects tab in the top Navigation menu. ER Objects
- 2 In the **Search Box**, type in 'Privacy Level'. Click on the Security Object **Privacy Level** in the Object list.



- 3 On the Privacy Level Security Object page, click on Alerts from the left menu.
- 4 To create a new Alert, click the New Condition button.
- 5 Fill out the **New Condition Alert** settings, Value, Regulated Customer Info, Warning and any additional text you require.

New Condition Alert ✕

Show Alert for Matching

Bound Object

Value

Matching Value

Alert Level

Warning

Info

Notification Text

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


Save
Cancel

- 6 Save the new Alert.

ER OBJECTS - VIEWING ALERTS



Searching for ER Objects is made simple in Team Server.


- 1 From the top navigation menu, click .
- 2 In the search box, type 'credit card'. You will see from the search result that the column **CrdNmb** is listed.



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

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


CrdNmb
Column
AOE.DM1 > AOE PDM > CrdCrd > CrdNmb
Not linked to any term [\[Create Linked Term\]](#)

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

RELATING TERMS



It is very easy to relate Objects to Glossary Terms.

- 1 On the top navigation menu, *Click* on **Terms**.
- 2 *Type* 'CLV' in search box.
- 3 *Click* on **Customer Lifetime Value** term.
- 4 *Click* Related ER Objects
- 5 *Click* on Relate tab
- 6 In the **search box**, *type* the following: 'datefirstpurchase' and relate it to the Customer Lifetime Value term using the  button.

Customer Lifetime Value
Business Terms
[\[Delete\]](#)

View Found In **Relate**

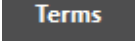
TERMS - ADVANCED USE



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

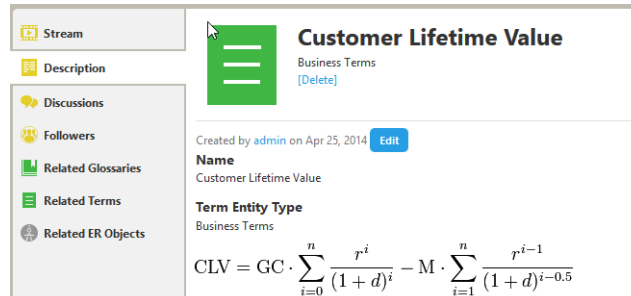
Lets have a look at a more advanced term.

NOTE: The related objects used here were set up in a previous section, see [Relating Terms](#).

- 1 On the top navigation menu, Click  .
- 2 Type 'Customer Lifetime Value' in to the search box.

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

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



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

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

ER/STUDIO TEAM SERVER - MORE FEATURES



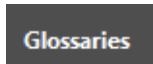
PEOPLE

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



GLOSSARY TOOLTIPS

To enable the Glossary Tool Tip feature:

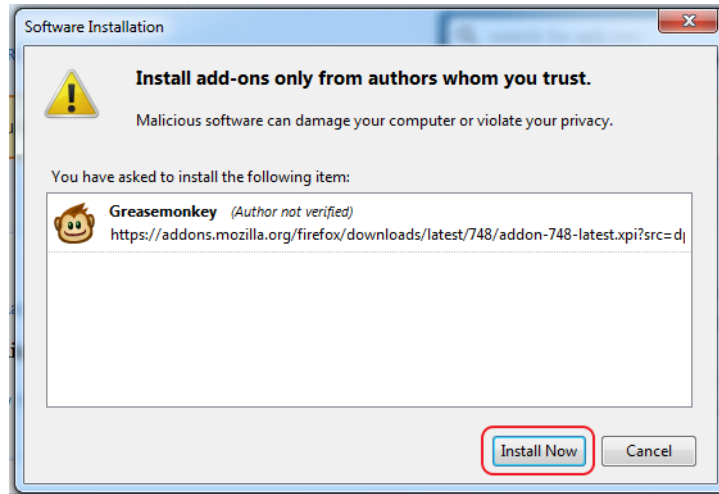
- 1 Ensure you are running your Team Server window in Mozilla Firefox.
- 2 On the top navigation menu, Click  .

3 Click **Glossary Tool Tip**

4 Install Greasemonkey add-on using the link provided.

+ Add to Firefox

5 You may also receive a warning before installing similar to the following pop up message. Click 'Install Now' to proceed with the add-on installation.



6 When the install has finished, click

Add Glossary Tool Tip

7 Click OK to install

NOTE: You may be required to restart your browser.

8 Click **My Settings > Admin**.

9 From the left navigation bar, click **Glossary Tool Tip**.

10 In the top right of the page, click **New Association**.

11 Fill out the fields of the New Association pop-up window, clicking **Add** to save each field before adding another.

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

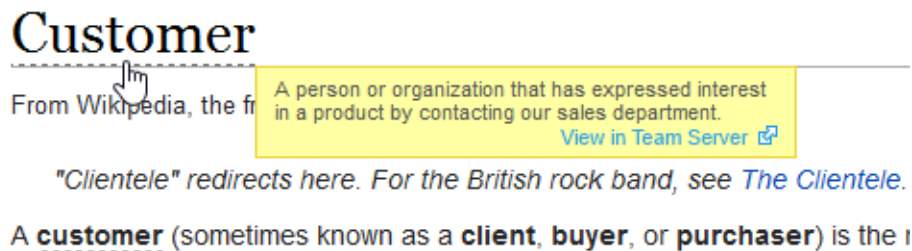
Glossaries - A list of one or more Glossaries that you would like to associate with the web sites in the URL Patterns field. Type 'Sales' then click **Add**

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

12 Click **Save**.

13  Go to <http://en.wikipedia.org/wiki/Customer> to watch the magic!

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



Conclusion

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

ADDITIONAL EVALUATION RESOURCES

Embarcadero Technologies provides a variety of resources to help support your evaluation and selection of a Data Modeling product for your organization.

Web site

Visit our Web site for current product and company information, educational materials and supporting information. Visit www.embarcadero.com.

Electronic Documentation

Detailed reference documentation is available on the ER/Studio Evaluation CD or online at <http://docwiki.embarcadero.com>

Further manuals are available at <http://docs.embarcadero.com>.

Online FAQ

The ER/Studio online FAQ provides answers to commonly asked questions regarding licensing, installation and other helpful topics.

To review the FAQs for ER/Studio visit: www.embarcadero.com/products/er-studio/faq

Support

You can contact ER/Studio support engineers, consultants and engineers directly by sending inquiries to:

For North America, Latin America and Asia Pacific:

support@embarcadero.com

For Europe, Africa and the Middle East:

uk.support@embarcadero.com

or log a case through embarcadero.com at: <http://support.embarcadero.com/>

Telephone Support

We encourage you to call us anytime you would like help or have questions during your evaluation, we value your feedback.

For North America, Latin America and Asia Pacific:

Phone: 415.834.3131

Hours: Monday to Friday, 6:00am - 6:00pm Pacific time

For Europe, Africa and the Middle East

Phone: +44 (0) 1628 684499

Hours: Monday to Friday, 9:00am to 5:30pm UK time