Product Documentation

ER/Studio Team Server XE5

User Guide

Version 4.0

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What Is ER/Studio Team Server

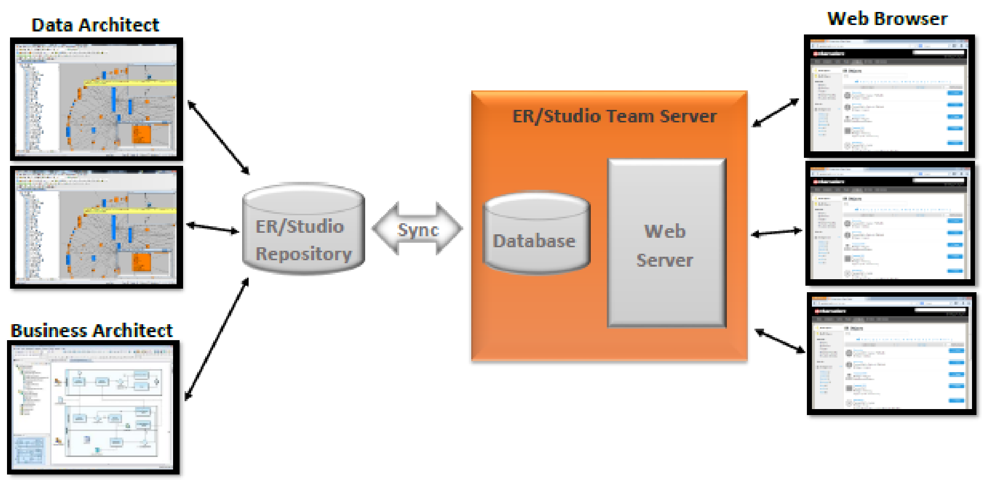
ER/Studio Team Server is a web-based tool to access, search, edit and manage enterprise metadata. It provides access to metadata from **ER/Studio Repository**, and it allows you to manage additional metadata, such as glossaries and terms or data sources.

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:

- 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.
- Browse all the contents of your **ER/Studio Repository** database, such as models and dictionaries, in a structured way.

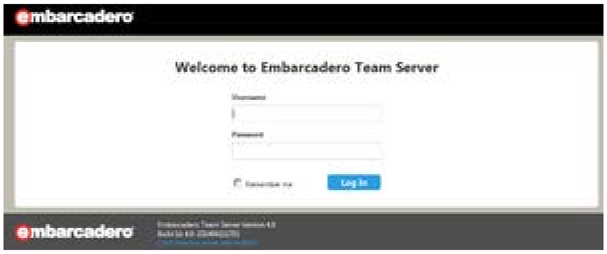
Using a web browser, you can access ER/Studio Team Server internally, via your corporate intranet, or externally, via the internet. This way, you can access all the information you need from anywhere.



See Also

- Overview of the ER/Studio Team Server Architecture
- Installing ER/Studio Team Server
- User 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.
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**.

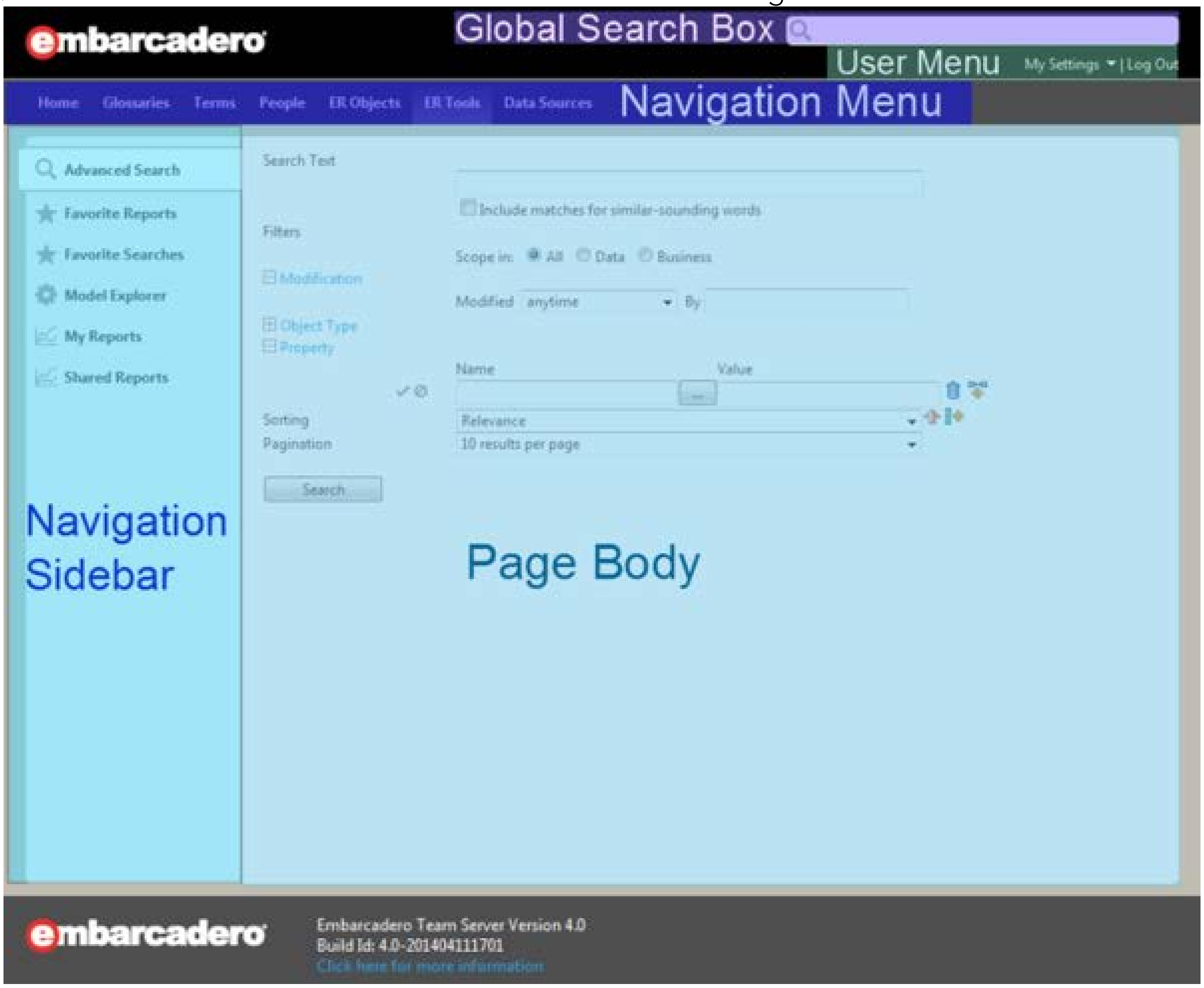
You should now be logged in to ER/Studio Team Server. If you are unsure of what to do next, see the User Guide.

See Also

- Troubleshooting, Connecting to ER/Studio Team Server
- Starting ER/Studio Team Server
- Login Page

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

See Also

- User Guide

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

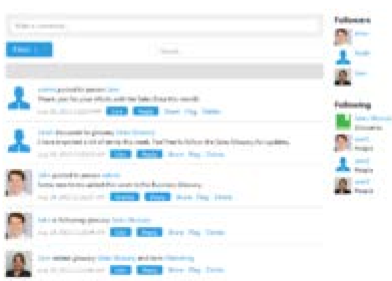
ER/Studio Team Server provides two different user profiles: social and non-social. The social version of ER/Studio Team Server is a useful system for users to share their experiences with other users and keep track of the activity related to the resources of their interest.

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 with 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



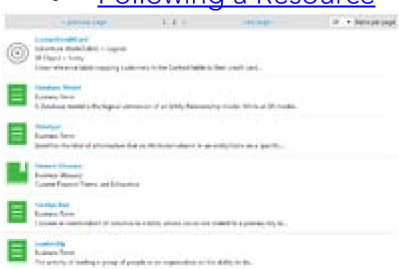
You can interact with any resource (glossaries, terms, ER objects, and data sources). Interaction includes having discussions (making comments) with other users about resources, tracking the changes and discussions related to resources and following people activity surrounding resources. For that purpose,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

- 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.

- 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.

- Following a Resource



  You can track other users' activity in relation to resources. This activity appears on the Home page when people that you follow 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

- Overview of User Experiences
- Overview of User Roles
- Overview of the User Interface
- 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**.
5. In the **Add to favorites** dialog that opens:
   0. Enter a **Name** to save the report with in the Favorite Reports list.
   1. Write a **Description** for the report.
   2. Check the **Shared** checkbox if you want to make the shared report public.
   3. 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

- Favorite Reports
- 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

- Adding a Shared Report to Favorite Reports
- Solution Browser
- Shared Report Configuration 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**.
5. In the **Email Report** dialog that opens:
    0. Specify in **To** an email address of the recipient.
    1. 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

Working with Resources

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

- Glossaries
- Terms
- People
- ER Objects
- Data Sources

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

- Searching for a Resource of 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

- 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

- Creating a Glossary
- Creating a Term
- 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 given 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

- 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.
   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

- 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

- Following a Resource
- 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

- Following a Resource

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.

See Also

- Creating a Glossary
- 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.

Below 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 **ER/Studio Team Server** users that must become stewards 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 **ER/Studio Team Server** users that must become stewards 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.
RelatedGlossary	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 **Term Entity Types** 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,ParentGlossa
ry,Attachment1
"",Accounting,Approved,Glossary of commonly used accounting and finance
terms,,,,admin;jimb,,attachment value
+++ Glossaries End +++
```

Terms

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

```
+++ Terms Begin +++
Key,Name,Status,Definition,Abbreviations,Aliases,AdditionalNotes,Stewards,RelatedGloss
aries,RelatedTerms,TermEntityType,Attachment2
"",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).",,,,term type,admin,Accounting,AMT,attachment value
+++ Terms End +++
```

See Also

- Creating a Glossary
- 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.

See Also

- Search Pages

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

- Creating a Glossary
- 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 Glossary** 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.

        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.

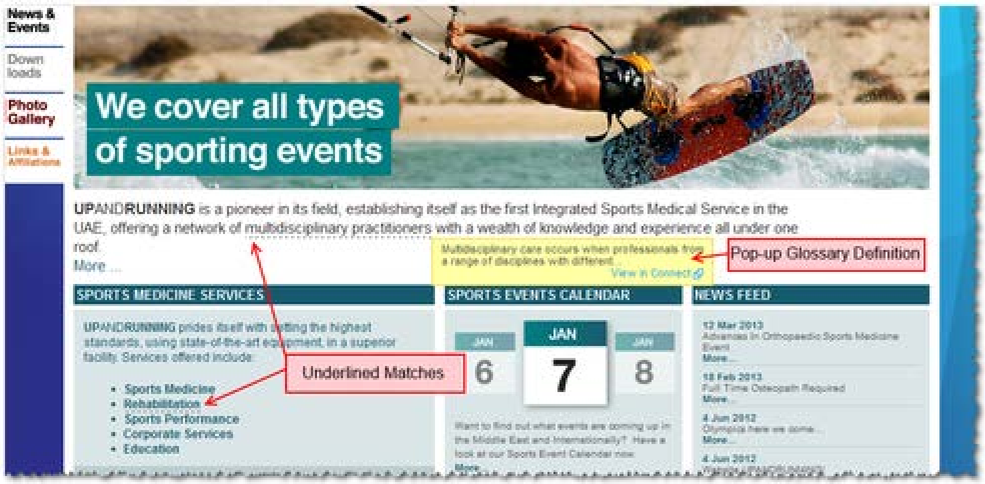
See Also

- Adding a Child to a Glossary
- Associating a Term with a Glossary
- Deleting a Resource
- 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]().

Once 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

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

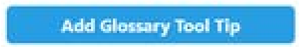
Installing Glossary Tool Tips

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

- Adding a Term to a Glossary
- Associating a Term with Another Term
- Deleting a Resource
- 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

- Matching an ER Object with Terms
- Related ER Objects subpage

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

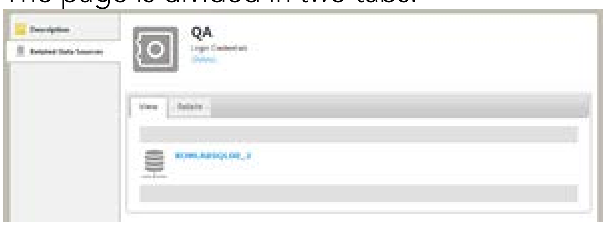
- Creating a Data Source
- Data Sources search page

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.

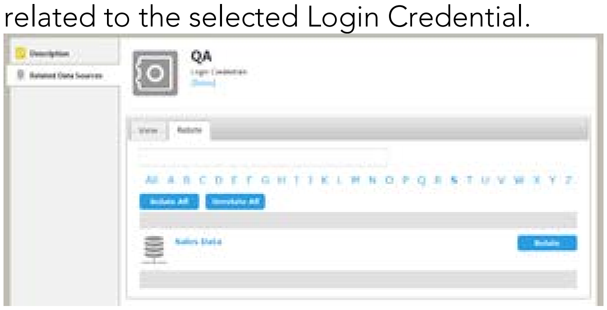
You can use the **Related Data Sources** page to relate or unrelate Data Sources to the current Login Credential.

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
- 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

- Deleting a Resource
- New Data Source dialog box

Data Source Fields for a Specific Database Management System

The tables below 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 **Enable** 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 **Enable** 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 **Enable** 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 **Enable** 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 **Enable** to use native Windows authentication to connect to the target database.

ODBC

Item	Description
Use DSN	Check **Enable** 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 **Enable** 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 **Enable** 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 **Enable** 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 **Enable** 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: • **TCP/IP** (default). Standard network protocol. • **Name Pipes**. Windows-specific network protocol.
Encryption	Check **Enable** to encrypt the network communication.
Default Database	Name of the target database.
Packet Size	Size of the network packets.
Windows Authentication	Check **Enable** to use native Windows authentication to connect to the target database.

Sybase

Item	Description
Use Sybase SQL.INI aliases	Check **Enable** 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 **Enable** 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 **Enable** 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 **Enable** to use native Windows authentication to connect to the target database.

See Also

- Creating a Data Source
- 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, find it and open its Login Credential page.

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 **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. Type the **User Name**. User Name is a login for a Data Source.
    3. Enter and confirm the **Password**. Password that allows access to the Data Source.
    4. Write a **Description** 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.
   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

- Creating Login Credentials
- 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

- Search Pages

Related Login Credentials

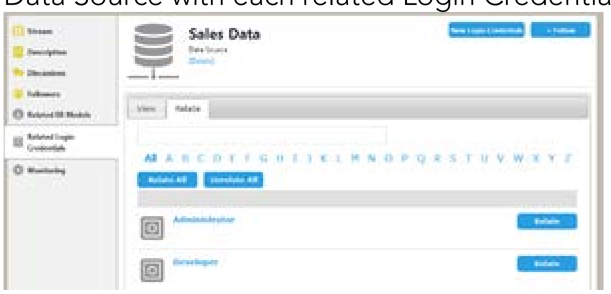
The **Related Login Credentials** subpage of [Data Sources]() lists the [Login Credentials]() that are either related to the current Data Source, or that can be related to the [Data Source]().

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]()

- Working with Data Sources

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

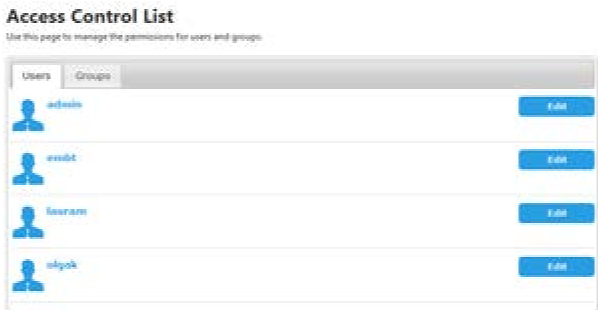
Login Credentials pages provide a sidebar with the following items:

Item	Description
Description	Provides detailed information about the Login Credential.
Related Data Sources	Shows a list of data sources that are associated with the current Login Credential .

See Also

- Working with Login Credentials

Access Control List

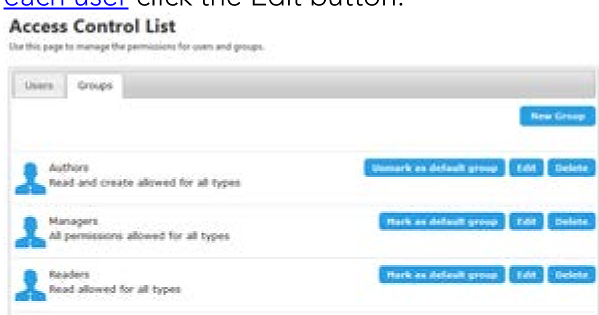


ER/Studio Team Server gives administrative permissions to users with the Super User role by default. Users assigned to the Super User role in ER/Studio can assign permissions to other users in ER/Studio Team Server and limit the actions that specific users or groups of users can perform over a resource from the Access Control List page.

The page is divided in two tabs:

Users Tab

The Users Tab displays a list of users available to assign permissions. To manage permissions of each user click the Edit button.



Groups Tab

The Groups Tab displays a list of groups available to assign permissions. It allows you to:

- Create a New Group.
- Mark a group as default. If you click **Mark as default group** button ER/Studio Team Server will assign this default group to each new user. To clear a group as default you can click **Unmark as default group** button.
- Manage permissions for groups.
- Delete a group.

Topics

- Manage User Permissions on a Resource
- Manage Group Permissions on a Resource
- Creating a Permissions Group
- Deleting a Permissions Group

See Also

- Manage Users
- Working with Resources
- Working with Login Credentials

Manage User Permissions on a Resource

To manage User Permissions:

1. Select Access Control List 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, Terms, ER Objects and Datasources.

Note: Users have the same permissions for Login Credential that the one they have to Data Sources.

It shows the following options fir 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 Stewards of a resource.

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

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

See Also

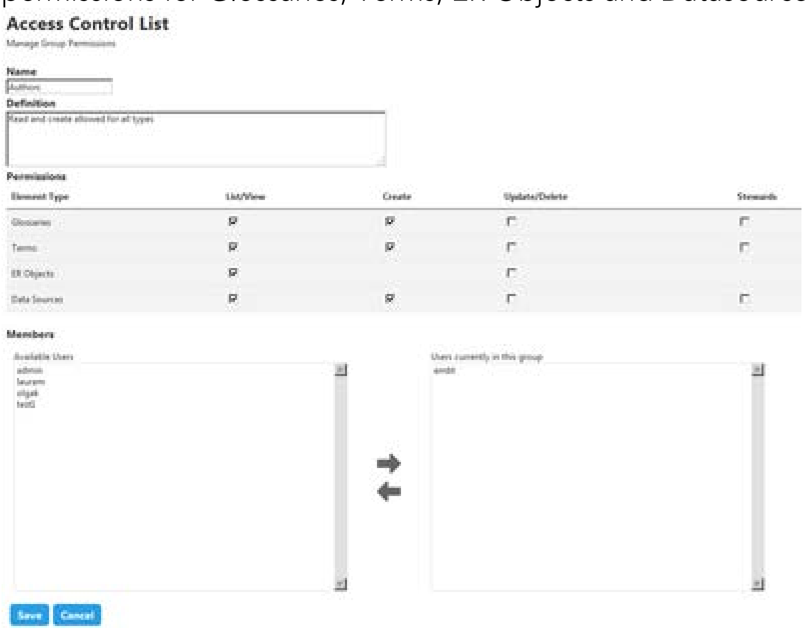
- Admin
- Manage Group Permissions on a Resource
- Deleting a Permissions Group

Manage Group Permissions on a Resource

To manage Groups Permissions:

1. Select Access Control List 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, Terms, ER Objects and Datasources.



Note: Users have the same permissions for Login Credential that the one they have to Data Sources.

It shows the following options fir 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 Stewards 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

Creating a Permissions Group

To create a Permissions Group:

1. Select Access Control List page and then select Groups tab.
2. Click the **New Group** button on the upper-right corner.
3. On the **New Group** dialog box that opens:
    1. Define the **Name** of your new permissions group.
    2. Write a **Description** that provides detailed information about the group, such as its purpose and privileges.
    3. Click **Save** to save your new permissions group.

See Also

- Admin
- Manage Group Permissions on a Resource
- Deleting a Permissions Group

Deleting a Permissions Group

To delete a Permissions Groups from ER/Studio Team Server:

1. Select Access Control List page and then select Groups tab.
2. Click the **Delete** button on the right-hand side of the groups entries.
3. On the confirmation dialog box that opens, click **OK**.

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

Note: Deleting a Permissions Group does not delete any users belonging to it.

See Also

- Admin
- Creating a Permissions Group
- Manage Group Permissions on a Resource

Monitoring

The Data Sources Monitoring tab allows you to turn on Data Source metric alerts.

The monitored metrics are:

- Percentage Space Available.
- Data Source Ping Time.
- Online/Offline availability.

You can also view the data source metrics in the data source description.

See Also

- Working with Data Sources

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

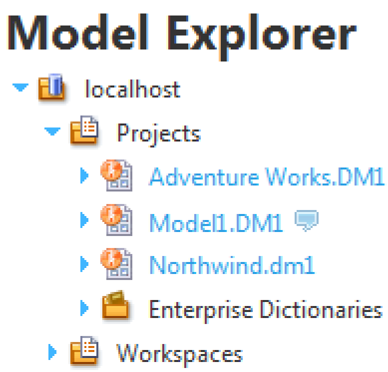
To associate an ER object with an existing term:

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



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

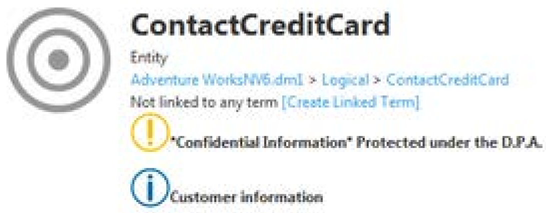
In this hierarchy, you can expand every ER object too see its content, and you can click any ER object to access its description page, which contain links that you can use to continue browsing your ER objects.

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

- Editing a Sensitive Data Alert Condition
- Deleting a Sensitive Data Alert Condition
- 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

- Adding a Sensitive Data Alert Condition
- Editing a Sensitive Data Alert Condition
- 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

- Adding a Sensitive Data Alert Condition
- Deleting a Sensitive Data Alert Condition
- Alerts subpage
- 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

- Matching a Term with ER Objects
- 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.
6. 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.
7. 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:

    0. 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.

    1. 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.
    2. 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.

8. In the **Sorting** combo box, you can select a field to sort the search results.
9. In the **Pagination** combo box, you can select the number of results to show per page.
10. 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

- Writing an Advanced Search String
- Saving Favorite Searches
- 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

- 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 **ts**unami, **tes**t or **t**hi**s**.
- ? represents a single character. For example, **a?h** matches **a**g**h** or **a**t**h**letic, but not **ah** or **a**rg**h**.
  Note: The first character in a search string cannot be a wilcard 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 single-quoted 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

- See the Comments to an ER Object
- Watching ER Objects for New Comments
- Adding a Comment to an ER Object
- Deleting a Comment from an ER Object

See Also

- 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

- Watching ER Objects for New Comments
- Deleting a Comment from an ER Object
- See the Comments to an ER Object
- Discussing Resources

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

- 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

- Changing Your Email Address for Notifications
- Adding a Comment to an ER Object
- See the Comments to an ER Object
- 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.

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

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

- Global Search Box

Simple Search Form

The simple search form is part of the **Simple Search** page.

To preform a search, enter a search string into the search box and click the **Search** button.

See Also

- Global Search Box
- Search Results

Search Results

The search results frame may be 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 Results Panel.
Add to favorites	Opens a window to add the current advanced search to your list of Favorite Searches. See Saving Favorite Searches.
Send by email	Opens a window to send the current advanced search by email. See Sending Searches By Email.
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 **Search Results Configuration** page, where you can customize the search results table view.
Order By (HTML view)	Lets you configure the search field to sort the results, and the order, either ascending or descending. By default, most relevant results come first. 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. **Tip:** You can further customize the search results using the table view with **Configure this view**.

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 ER object description page.
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	The type of filter. This can be: • **Object Type(s)**, to filter the search results by the ER object type of the matching ER object. • An ER object type that one or more matching ER objects have as parent (for example, **Diagram(s)**), to filter the search results by common parent.
/ Hide / Show filters	Click this icon to hide ( ) or show ( ) the filters available in the current filtering option.
/ Limited / Unlimited filters	Click this icon to switch on or off the limit of filters that can be listed in the current filtering option: : Listed filters are limited. : All filters are listed.
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	The name of the filter. The filters depend on the **Field type**: • If it is **Object Type(s)**, each filter name is an ER object type (for example, **Model** or **Entity**). • 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.
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>
...

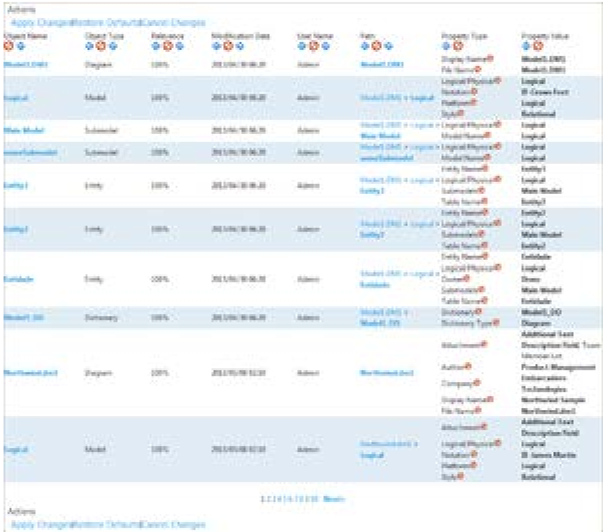
The following table explains each part of the list of active filters in detail:

Item	Description
Remove	You can click the icon on the left-hand side of **Current Active Filter(s)** 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:

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

See Also

- 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.

The following table shows the list of the existing resource pages (first row), as well as their respective subpages (second row):

Glossary Pages	Term Pages	Person Pages	ER Object Pages	Data Source Pages
• Stream • Description • Terms • Discussions • Followers • Children	• Stream • Description • Discussions • Followers • Related Glossaries • Related Terms • Related ER Objects	• Stream • Description • Followers • Following	• Stream • Description • Discussions • Followers • Related Terms • Related Data Sources • Alerts	• Stream • Description • Discussions • Followers • Related ER Models

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

See Also

- Searching

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

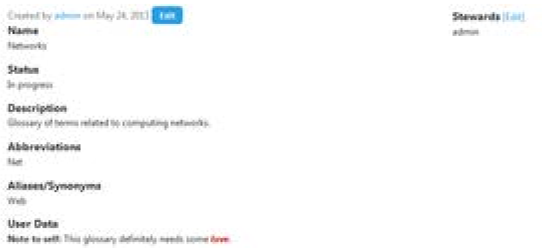
Glossary pages provide a sidebar with the following items:

Item	Description
Stream	Opens the activity stream of the current glossary. It displays entries, for example, when a term is associated with the current glossary. The sidebar shows: • **Followers**. A list of users that are following the current glossary. See the Followers subpage. • **Terms**. A list of terms associated with the current glossary. See the Terms subpage. • **Children**. A list of glossaries that are a child of the current glossary. See the Children subpage.
Description	Provides detailed information about the glossary.
Terms	Shows a list of terms that are associated with the current glossary.
Discussions	Opens the list of discussions about the current glossary.
Followers	Shows a list of users that are following the current glossary.
Children	Shows a list of glossaries that are a child of the current 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:

- The details column on the left-hand side.
- The stewards column on the right-hand side.

Details Column

The details column provides the following fields:

Item	Description
Author and Date	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>
Edit	On the right-hand side of the author and date information, there is an **Edit** button that you can click to enter the edition mode. In the edition mode, you can edit the glossary data, and click **Save** at the bottom of the page to save your changes, or **Cancel** to revert them.
Name	Name of the glossary.
Status	Text describing the status of the glossary.
Description	Detailed description of the glossary.
Abbreviations	List of abbreviations of the glossary.
Aliases/Synonyms	List of aliases and synonyms of the glossary.
User Data	Custom information related to the business object that only you can see. Other users, including super users, 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.

See Also

- Working with Glossaries

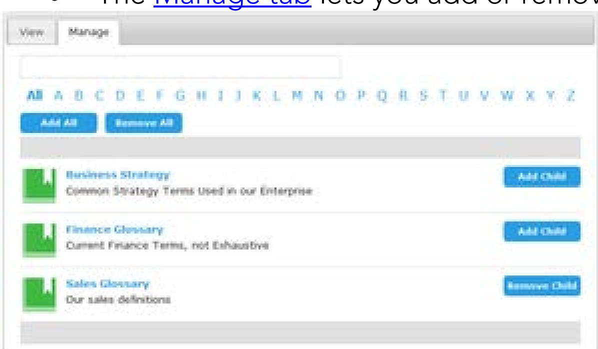
Children

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
Stream	Opens the activity stream of the current term. It displays entries, for example, when a term is related to a glossary. The sidebar shows: • **Followers**. A list of users that are following the current term. See the Followers subpage. • **Related Glossaries**. A list of glossaries that are related to the current term. See the Related Glossaries subpage. • **Related Terms**. A list of terms related to the current term. See the Related Terms subpage. • **Related ER Objects**. A list of ER object related to the current term. See the Related ER Objects subpage.
Description	Provides detailed information about the term.
Discussions	Opens the list of discussions about the current term.
Followers	Shows a list of users that are following the current term.
Related Glossaries	Shows a list of glossaries that are related to the current term.
Related Terms	Shows a list of terms that are related to the current term.
Related ER Objects	Shows a list of ER Objects 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:

- The details column on the left-hand side.
- The stewards column on the right-hand side.

Details Column

The details column provides the following fields:

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 **Edit** button that you can click to enter the edition mode. In the edition mode, you can edit the term data, and click **Save** at the bottom of the page to save your changes, or **Cancel** to revert them.
Name	Name of the term.
Status	Text describing the status of the term.
Description	Detailed description of the term.
Abbreviations	List of abbreviations of the term.
Aliases/Synonyms	List of aliases and synonyms of the term.
User Data	Additional information about the business object.

Stewards Column

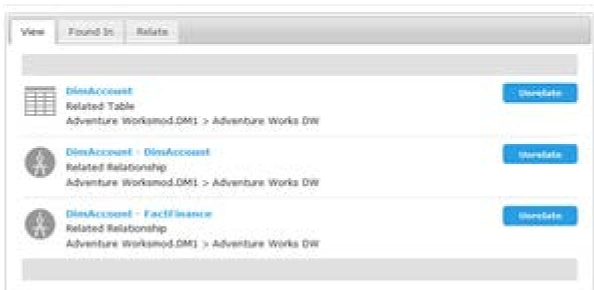
The stewards column provides a list of **Stewards**, users with permission to edit the term.

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

See Also

- Working 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:

- The View Tab.
- The Found In tab lets you match and unmatch ER objects to the current term.
- The Relate tab lets you relate and unrelate ER objects to the current term.

View Tab

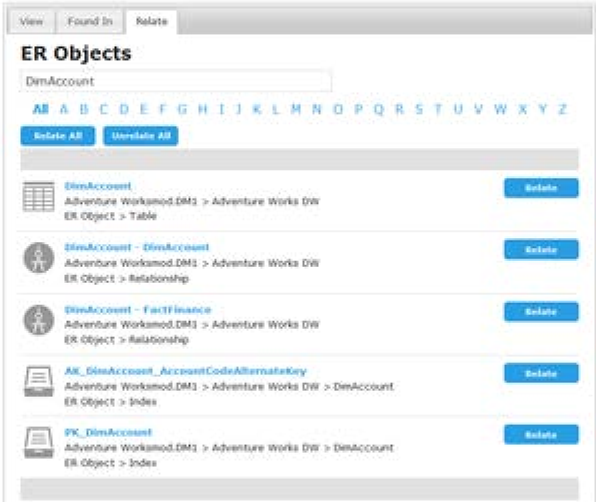
displays a list of related and matching ER objects. The list shows the related ER objects first, and then the matching ER objects.

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

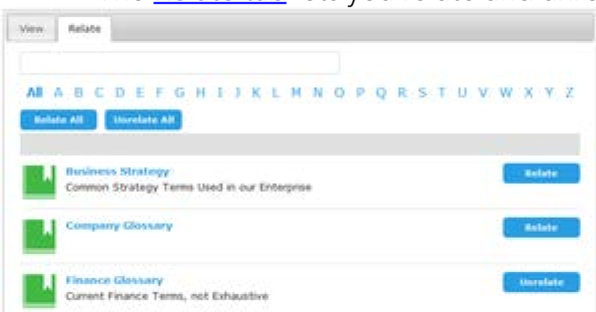
Related Glossaries

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

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

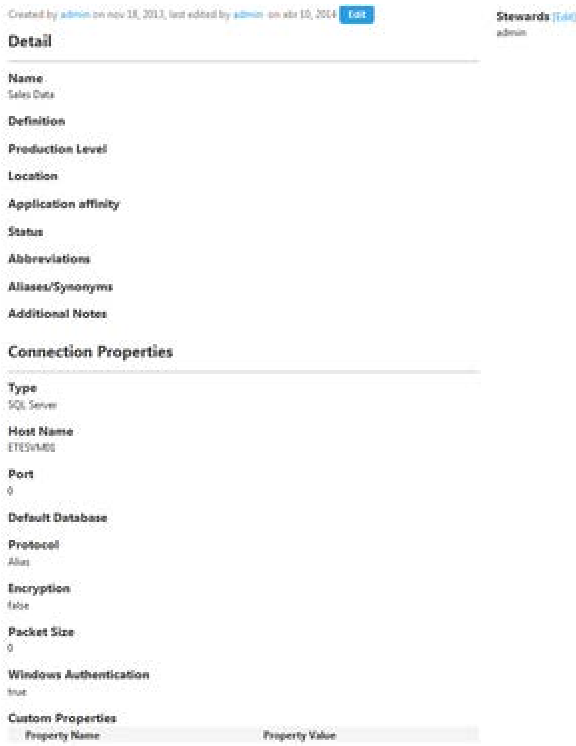
Data source pages provide a sidebar with the following items:

Item	Description
Stream	Opens the activity stream of the current data source. Displays entries, for example, when a data source is related to an ER model. The sidebar shows: • **Followers**. A list of users that are following the current data source. See the Followers subpage.
Description	Provides detailed information about the data source.
Discussions	Opens the list of discussions about the current data source.
Followers	Shows a list of users that are following the current data source.
Related ER Models	Shows a list of ER models that are related to the current data source.
Related Login Credentials	Shows a list of Login Credentials that are related to the current data source.
Monitoring	Shows a list of ER models that are related to the current 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.

Details Column

The details column provides the following fields:

Item	Description
Name	Name of the data source.
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 **Type** of data source, ER/Studio Team Server displays a different set of fields between the **Type** and the **Custom Properties** fields. See Data Source Fields for a Specific Database Management System.
Custom Properties	Custom properties of the data source. For each property you can see a property name and an associated property value.
Description	Detailed description of the data source.
Abbreviations	List of abbreviations of the data source.
Aliases/Synonyms	List of aliases and synonyms of the data source.
User Data	Custom information related to the data source that only you can see. Other users, including super users, cannot see the information in this field.
Monitoring information	List of data source metrics.

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

- Data Source Pages
- ER Objects
- Working with Data Sources

Related Login Credentials

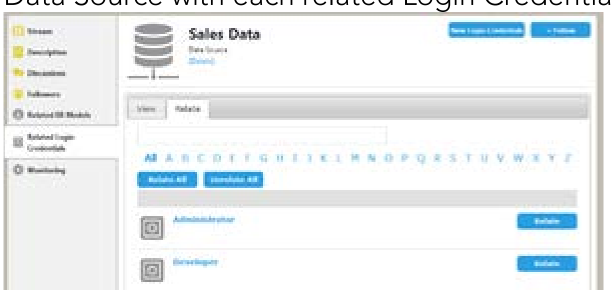
The **Related Login Credentials** subpage of [Data Sources] lists the [Login Credentials] that are either related to the current Data Source, or that can be related to the [Data Source].

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.

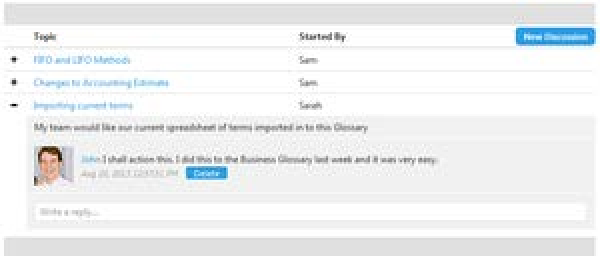
On the right side of the Login Credentials entries, you can click **Relate** to relate a Login Credential to the current Data Source, or you can click **Unrelate** to unrelate the target Login Credential from the current Data Source.

See Also

- [Data Source Pages]
- [Login Credential Pages]

- Working with Data Sources

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

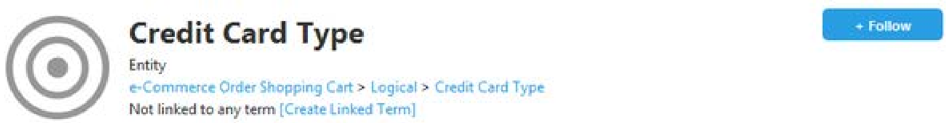
ER Object Pages

ER Object pages provide detailed information about specific ER objects, as well as 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 different 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
Stream	Opens the activity stream of the current ER object.
Description	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.
Discussions	Opens the list of discussions about the current ER object.
Followers	Shows a list of users that are following the current ER object.
Related Terms	Shows a list of terms that are associated with the current ER object.
Related Data Sources	Shows a list of data sources that are associated with the current ER object.
Alerts (only security properties and attachments)	Lets you configure conditions that raise alerts about sensitive data.

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.

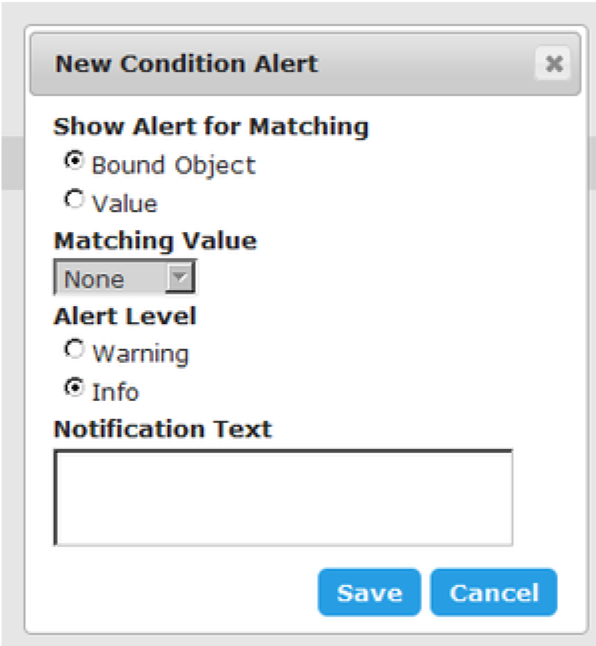
Sidebar for Non-Social Users

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



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.

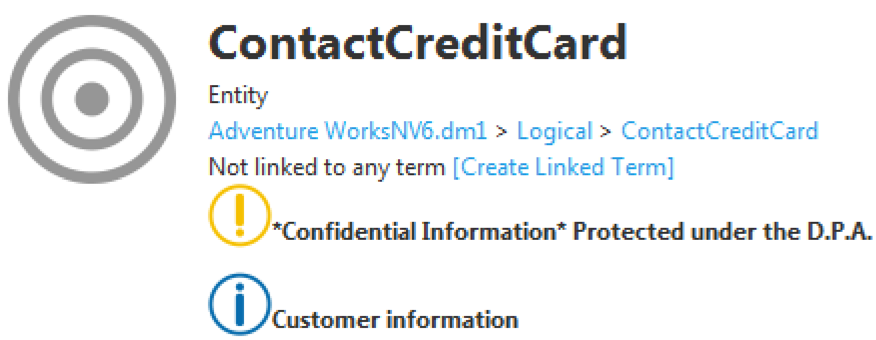
You can access the Alerts subpage by clicking the Alerts Icon at the common sidebar from a Security Property or Attachment page.

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	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: • **Bound Object**. Show the target alert for any object bound to the current security property or attachment. • **Value**. 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 **Value**.
Alert Level	The level of the alert, which determines which icons **ER/Studio Team Server** displays along with the defined **Notification Text**. You may choose any of the following values: • **Info**. • **Notice**. The following image shows the header of an ER object with one alert of each type and a **Notification Text** equal to the name of the chosen **Alert Level**. 
Notification Text	Text of the alert. **ER/Studio Team Server** displays this text on the header of matching ER objects, on the right-hand side of the icon representing the **Alert Level**.
Delete Condition (only super users and alert condition author)	Deletes the target condition.

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

See Also

- Configuring Sensitive Data Alerts
- Object Alerts page

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
Labels	Lets you view and manage the current ER object labels.
Comments	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 super user.

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 Column
    - 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

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

- Search Results page
- 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

- Search Results page
- 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

- Watching ER Objects for New Comments
- Preferences page

Troubleshooting

Here you can find a list of some frequently encountered problems, as well as 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:

- Check that the URL you are trying to access is ER/Studio Team Server's.
- Check that your system has a working connection to the ER/Studio Team Server server.
- Check that ER/Studio Team Server is running. See Starting ER/Studio Team Server.
- 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.

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:

```
SELECT sess.process, sess.status, sess.username, sess.schemaname, SQL.sql_text
FROM v$session sess,  v$sql     SQL
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.

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.

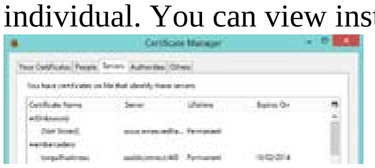
D

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. Since there are choices of identifiers for many entities, the logical model indicates the current identify selection.

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