



Product Documentation

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# ER/Studio® Portal

New Features Guide

Version 1.5.1

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# NAME CHANGE

Please note the following name changes:

- ER/Studio is now ER/Studio Data Architect or ER/Studio DA for short.
- EA/Studio is now ER/Studio Business Architect or ER/Studio BA for short.
- ER/Studio Enterprise Portal is now ER/Studio Portal.
- ER/Studio Enterprise Repository is now ER/Studio Repository.
- ER/Studio Enterprise is now the total solution comprised of ER/Studio DA, ER/Studio BA, ER/Studio Portal, and ER/Studio Repository.

# NEW FEATURES SUMMARY

This guide is organized into the following sections:

- [Top New Features](#)
- [User Interface Improvements](#)
- [Details of Top New Features](#)

# TOP NEW FEATURES

The following are the top new features incorporated in ER/Studio Portal 1.5:

**Better Performance:** The synchronization process between the portal and repository databases has been optimized further to sync diagrams as fast as possible.

**Object Labels on Detailed Reports:** You can add a label to any detailed report. Labels are used like bookmarks or file folders. They are a way to organize and document reports for your own use.

**Commenting on Detailed Reports:** You can also add comments to detail reports that you can share with other users. Commenting on reports enables you to communicate your ideas to other users about the report. Depending on how the administrator has configured the Portal, any comments added may require administrative approval before they display. Approved comments can be seen by any user with the authorization to view the report. Comments are accessible from the Repository Explorer.

**Support for Visual Data Lineage:** ER/Studio Data Architect Data Lineage diagrams are now fully supported in the Portal. You can browse them through the Repository explorer, they are fully searchable, and you can create custom reports for this diagram type.

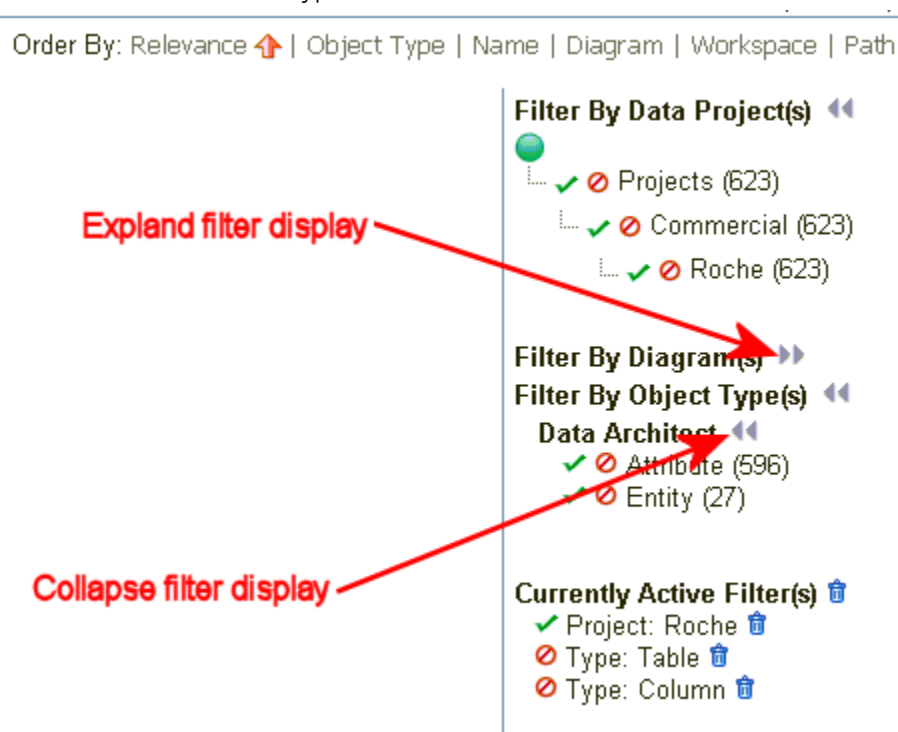
**Support for ER/Studio Business Architect:** You can now browse through ER/Studio BA diagrams in the Workspaces nodes of the Repository explorer. Clicking certain objects will display small images of the diagrams. Clicking an ER/Studio BA object presents a detail report for that object.

You can now limit your search to only ER/Studio BA or ER/Studio DA objects, or you can choose to search through all Repository objects.

## USER INTERFACE IMPROVEMENTS

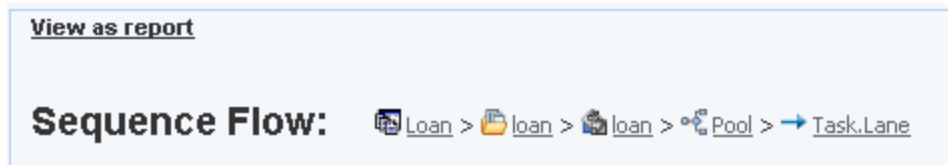
The following illustrate the improvements made to the user interface for this release.

**Show/Hide Filters:** You can now hide or display the default number of filters by clicking the arrow next to the name of the filter type.

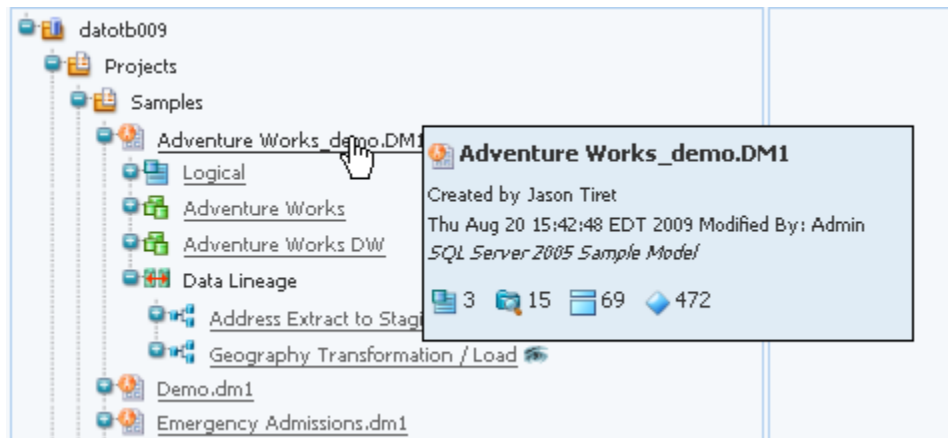


**Interactive images in Repository Explorer:** For ER/Studio DA models and submodels, you can select View Image to view the model as it would appear in the ER/Studio DA Window. Once the image appears, you can then click on an object to view a detail report on that object. For example, clicking on an entity brings up the Entity detail report.

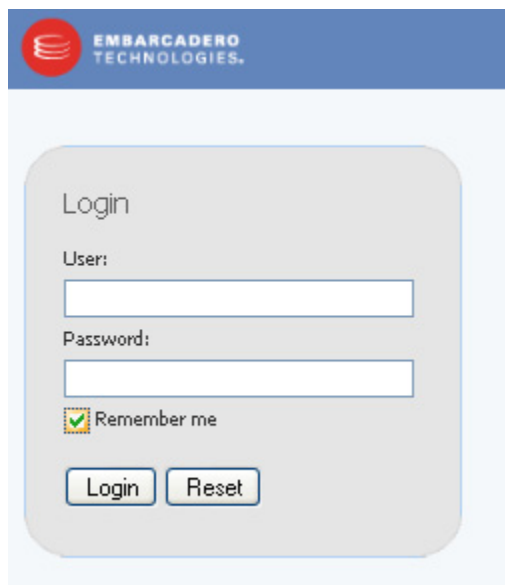
**Navigational Trail for Drill-Down Reports:** Return easily to previous reports by clicking items in the navigational trail.



**Diagram Thumbnails Included in the Explore Dashboard:** Hover your mouse over a diagram to view a snapshot of the diagram contents.



**Remember Me Option for Future Logins:** Click Remember me and when you enter the first few letters of your user name, the system will auto-complete your name and the password field also.



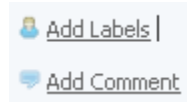
## DETAILS OF TOP NEW FEATURES

Top new features for this release include the following:

- [Object Labels on Detailed Reports](#)
- [Commenting on Detailed Reports](#)
- [Support for Visual Data Lineage](#)
- [Support for ER/Studio Business Architect](#)

## OBJECT LABELS ON DETAILED REPORTS

To add a new Label, at the bottom of the detail report, click Add Labels. Enter the label text in the box provided and then click Add. You can add another label if you like. When you are finished adding labels, click Done.

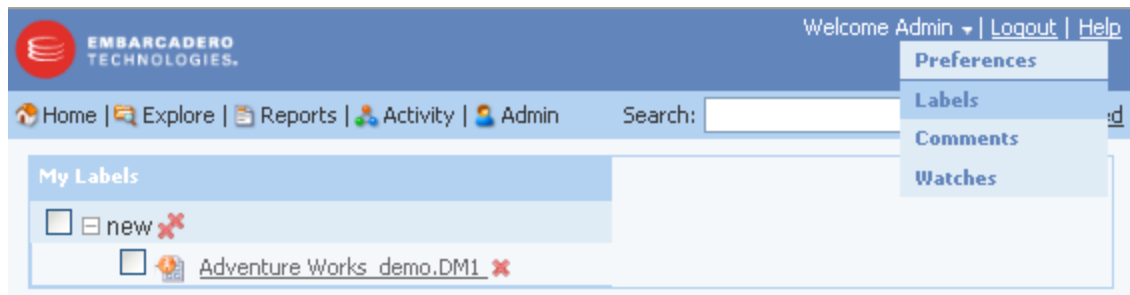


To add an existing label, at the bottom of the detail report, click the check mark next to the label you want to add to the selected report.

To remove a label, at the bottom of the detail report, in the Current labels area click X next to the label you want to remove from the report. You can also remove a label from a report from the My Labels page. In the Labels area at the bottom of the detail report, click the label name to view the My Labels page. Then click X next to the report name to remove the label from that report. Click the checkbox to the left of the label name to remove the label from all reports.

To view where a label is used, in the Labels area at the bottom of the detail report, click the label name. The My Labels page appears where you can see all the labels you have created and which reports you have added them to. Click the report name to view where the label is used.

To view your labels, click your user name at the top of the Browser, just to the left of the Logout and Help links. Then from the list of options that appears, click Labels. The My Labels page appears where you can see each label and the names of the reports the labels have been attached to.



From the My Labels page, you can also:

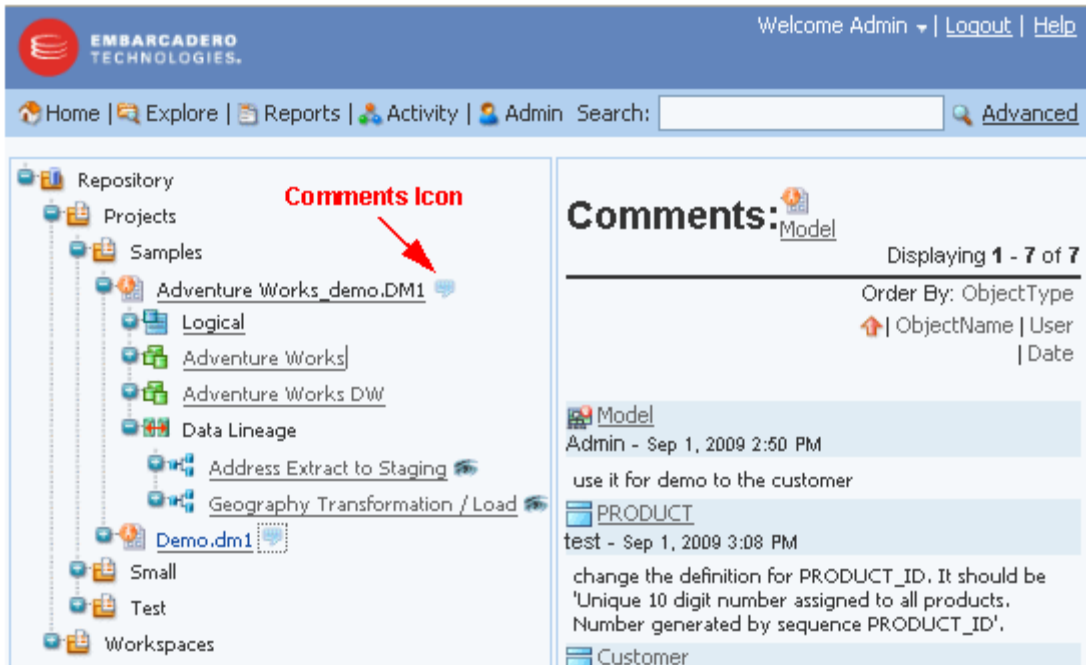
- Delete a label from all reports by selecting the checkbox next to the label name and then clicking X.
- Delete a label from a specific report by clicking the checkbox next to the report name and then clicking X.
- View the report the label is attached to by clicking the link on the report name.



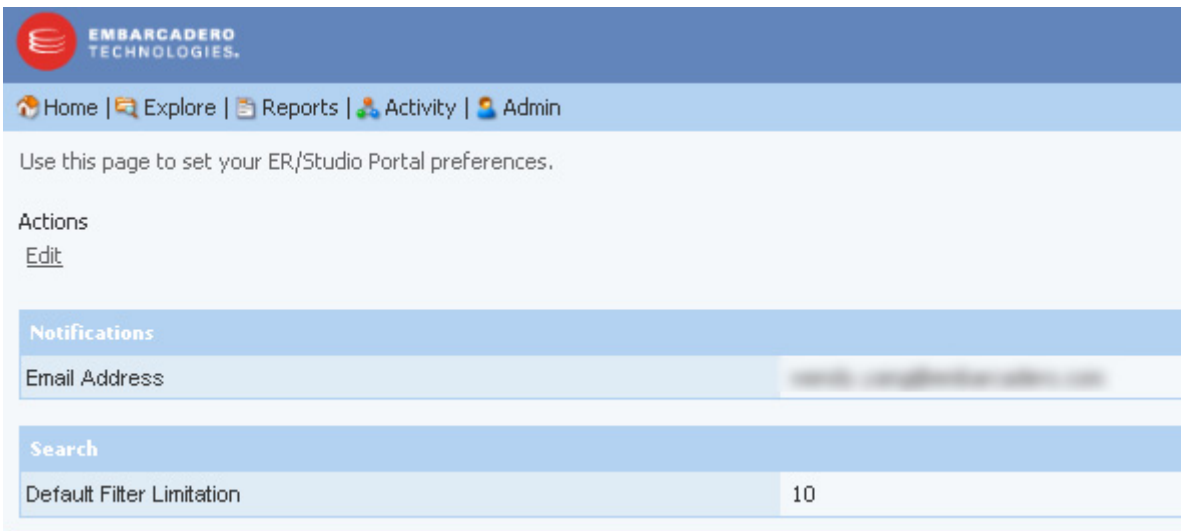
## COMMENTING ON DETAILED REPORTS

### WORKING WITH COMMENTS

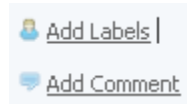
To view a list of all comments for a diagram, click the Comments icon to the right of the diagram name in the Repository Explorer. You can reorder the comments by clicking one of the order options in the Order By area.



To specify the email address where comments watch notifications should be sent, click your user name next to the Logout and Help links near the top of the browser page. From the list of options that appears, select Preferences. On the Portal preferences page that appears, click Edit. In the space provided enter your email address and then click Apply Changes.



To add a new comment, at the bottom of a detail report, click Add Comment. Enter the comment in the Add Comment area and then click Add. The comment can be seen by any user viewing this report, once the moderator has accepted the comment. If the administrator hasn't set the Interaction Settings to require administrative approval for comments, then you can simply click the check mark next to the comment name to enable other users to view the comment.



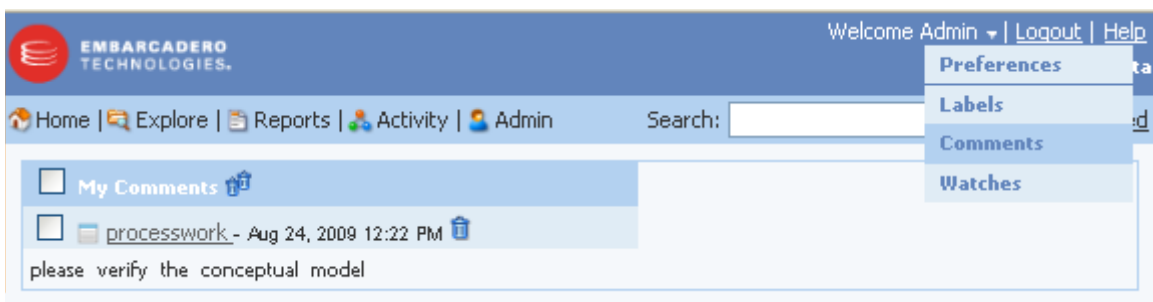
To view the comments in a report, at the bottom of a detail report, click the plus sign (+) to the left of Comments to expand the comments and view all accepted comments.

To delete a comment, at the bottom of a detail report, click the plus sign (+) to the left of Comments to expand the comments, and then click X next to the comment you want to remove.

To watch the comments made by other users on a report, click the watch icon (closed envelope) at the top right-hand corner of the report and an email will be sent to you whenever a comment is added to the watched report by another user. The watch icon changes to an open envelope to indicate that you are watching this report. You will need to specify the email address where the comment update message should be sent to. This you specify in your Preferences, by clicking your user name

To stop watching the comments made by other users on a report, click the watch icon (open envelope) at the top right-hand corner of the report. The watch icon changes to a closed envelope to indicate that you are not watching this report.

To view all your comments, click your user name at the top of the Browser, just to the left of the Logout and Help links. Then, from the list of options that appears, click Comments. The My Comments page appears where you can see each comment and the names of the reports the comments have been attached to.



From the My Comments page you can also:

- Delete a comment from all reports by selecting the checkbox next to My Comments and then clicking the trash can.
- Delete a comment from a specific report by clicking the checkbox next to the report name and then clicking the trash can.
- View the report the comment is attached to by clicking the link on the report name.

## MODERATING COMMENTS

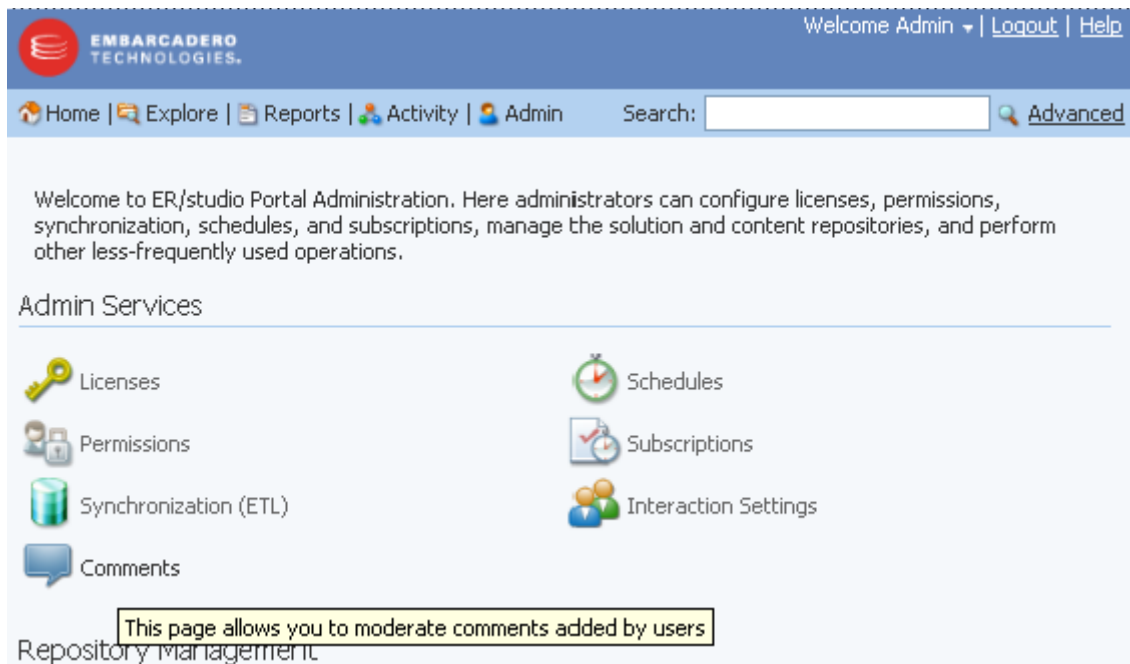
You can use this page to review the comments other users have attached to diagrams and see those comments in context. From this page you can accept or reject the comment. Accepting the comment makes it available to other users to view from the Diagram details report. Rejecting a comment deletes it from the system.

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**NOTE:** Before you can moderate comments, you must enable comment moderation on the Interaction Settings page. For more information, see “Managing User Interactions” in the ER/Studio Portal User Guide.

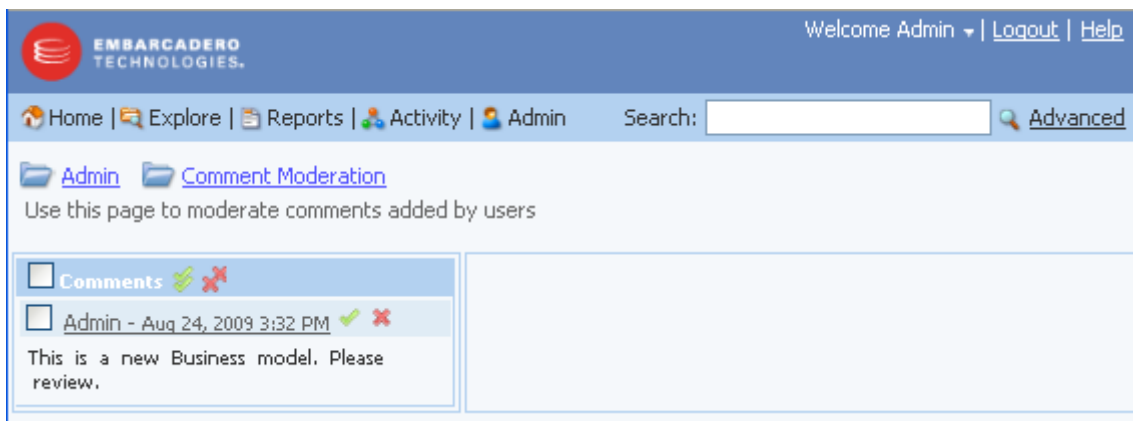
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- 1 Click Admin to open the Admin Services page.



- 2 Click Comments.

The comment moderation page appears.



- 3 To view a comment in context, click the underlined comment name. At the bottom of the report that opens you can choose to accept or delete the comment as required.

To delete a comment, select the checkbox next to the comment name and then click the delete symbol (X).

To accept a comment, select the checkbox next to the comment name and then click the accept symbol (✓).

**TIP:** You can delete or accept all listed comments by selecting the Comments checkbox and then clicking the delete or accept symbol next to Comments.

## MANAGING USER INTERACTIONS

The Administrator can use the Interaction Settings to control whether a moderator must accept or reject comments, and whether users can email search and report results.

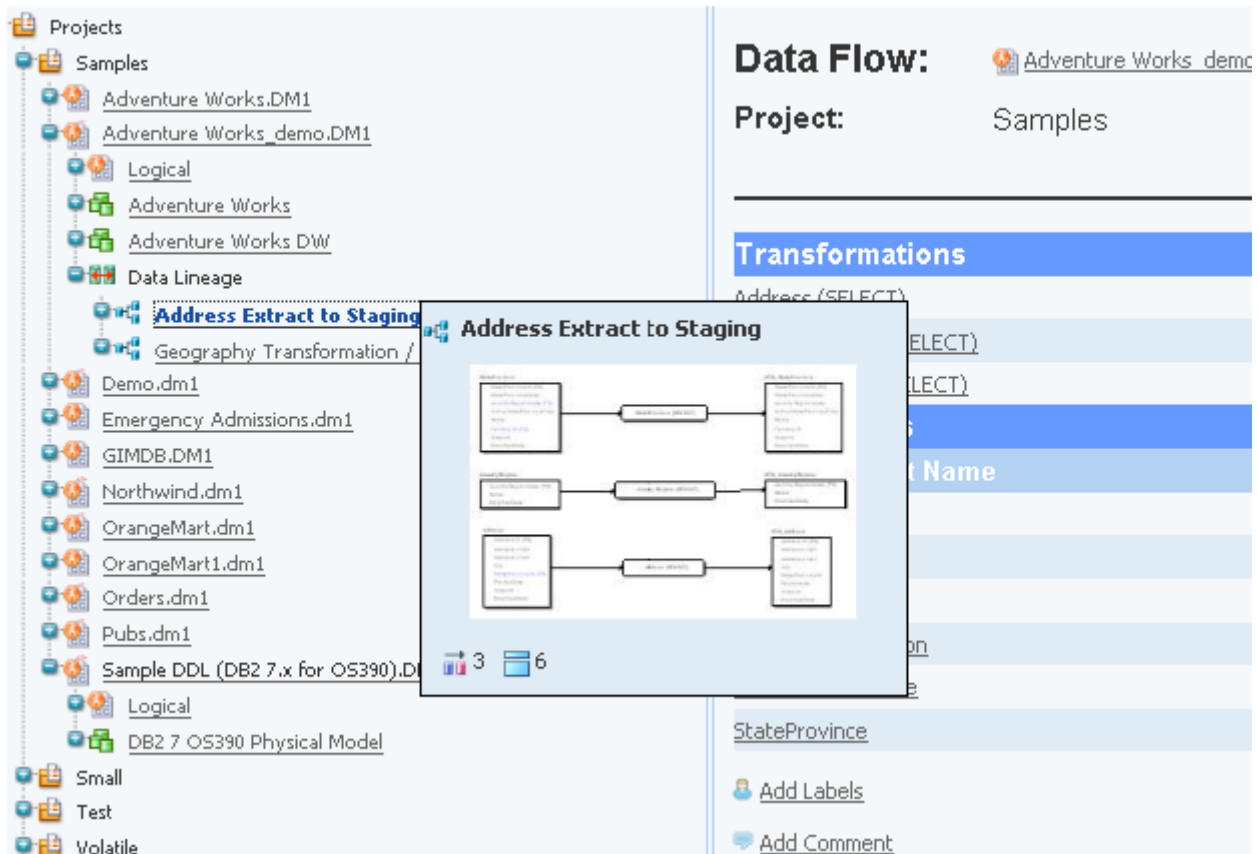
- 1 Click Admin > Interaction Settings.
- 2 Complete the Interaction Settings page as required by selecting the options you want to enable and clearing the checkboxes of options you want to disable.
- 3 If you want comment alerts sent to a specific user, enter their email address in the Comments area.

**TIP:** Email server information, for sending emails of search results or reports, is configured during Portal installation. These options can be overridden in the Configuration Manager. For more information, see "Using the ER/Studio® Portal Configuration Manager" in the ER/Studio Portal User Guide.

## SUPPORT FOR VISUAL DATA LINEAGE

### BROWSE VISUAL DATA LINEAGE REPORTS

Hover your mouse over the name of a visual data lineage diagram and a small image of the diagram is presented. Click the name of a visual data lineage diagram and the basic Data Flow report appears for that diagram.



### Data Flow Detail Report

- You can access this report from the Diagram report or by clicking the name of the visual data lineage diagram in the Repository explorer. From the Diagram report, you can drill down through *Search Results > Diagram > Data Lineage* and click the link of the desired data flow in the Data Lineage column.
- The Data Flow report contains two sections: Transformations and Components. The listings of transformations and source object names are sorted alphabetically by name.
- From this report you can click links to view transformation and entity detail reports.
- This report consists of a header section with properties of the data flow and two sections for data flow transformations and components. The Data Flow name and related reports are displayed at the top of the report.




- This report is accessible from Explore, Browse Repository, search results, and the Diagram report.
- The data for this report is selected for only one dataflow at a time.

### Transformation Detail Report

- You can access this report from the Diagram report. Drill down through *Search Results > Diagram > Data Flow* and click the link of the desired transformation in the Transformations column.
- The transformation report contains four sections: inputs, outputs, data movement rules, parent objects, and child objects. The listing of attributes, entities and rules are sorted alphabetically by Name.
- This report consists of a header section with properties of the physical submodel, related reports, and three sections for model entities, relationships, and views. The physical submodel name and related reports are displayed at the top of the report.
- This report is accessible from Explore, Browse Repository, search results, and the Data Flow report.
- The data for this report is selected for only one transformation at a time.



## CREATE CUSTOM DATA LINEAGE REPORTS

From the Technical Reports area of the Reports dashboard, you can create a custom data lineage report.

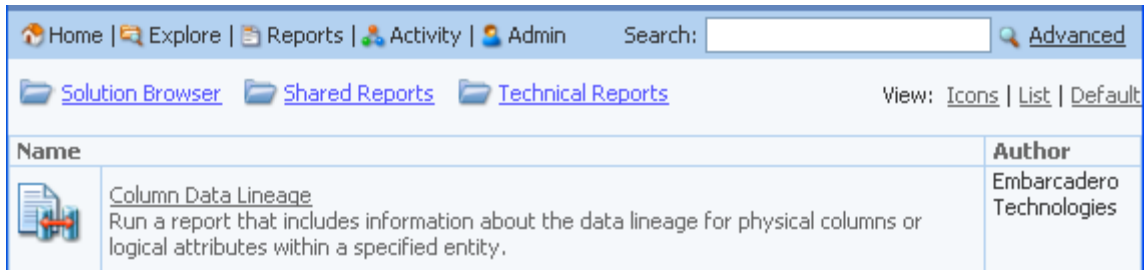
View:  [Icons](#) |  [List](#) |  [Default](#)

**Solution Browser**  
Please select one of the solutions below. The Shared Reports section displays standard reports provided by Embarcadero Technologies as well as any custom reports shared for public use. The User Actions section allows you to view your scheduled reports or create new reports.

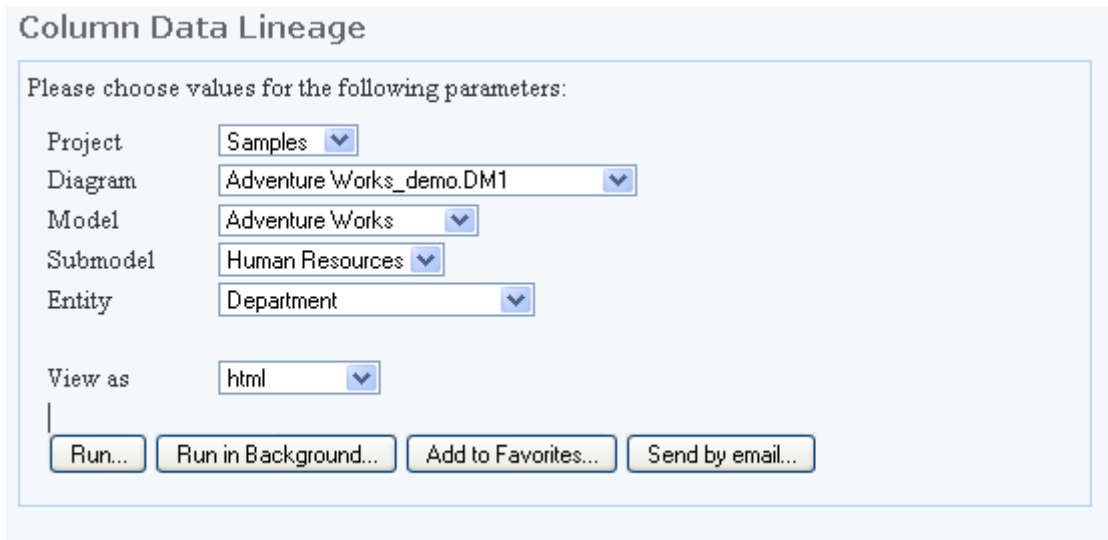
Shared Reports

Name		Author
 <u>Business Reports</u>	Business reports for logical models covering attribute definitions, business rules, and entity definitions.	Embarcadero Technologies
 <u>Technical Reports</u>	Technical reports for ER/Studio objects covering column data lineage, domain bindings, entity listings, entity attachments, reference values, and security classifications.	Embarcadero Technologies

Click Column Data Linage to start creating the report



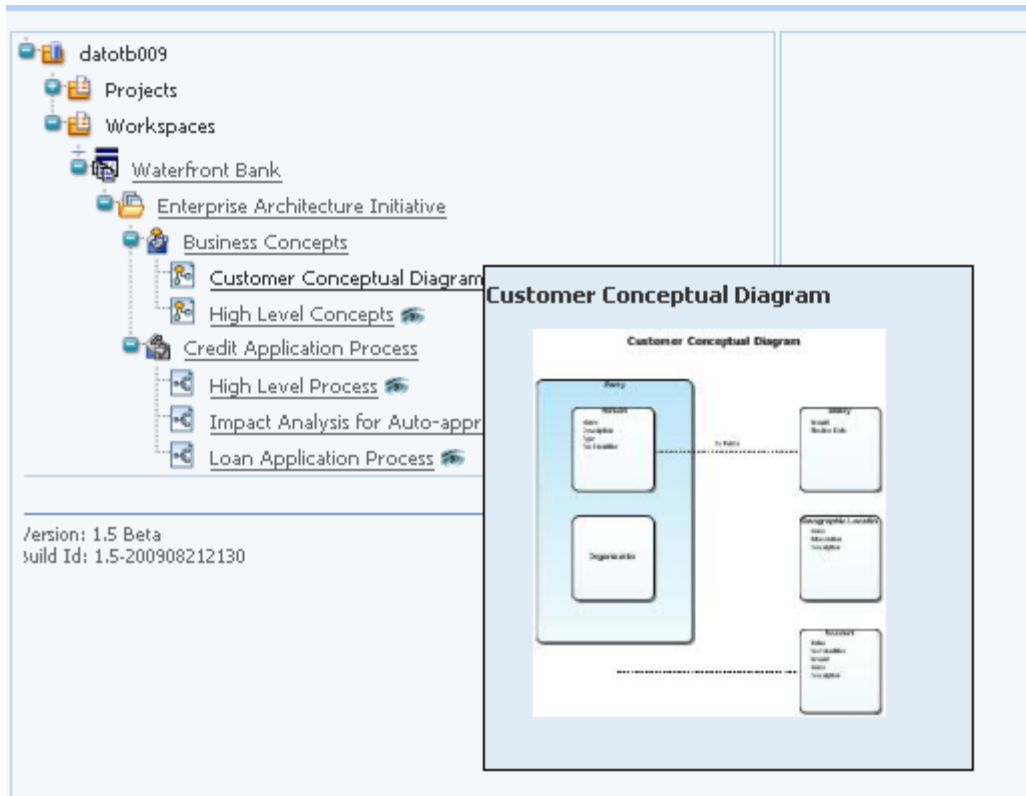
Select your choices and start processing the report.



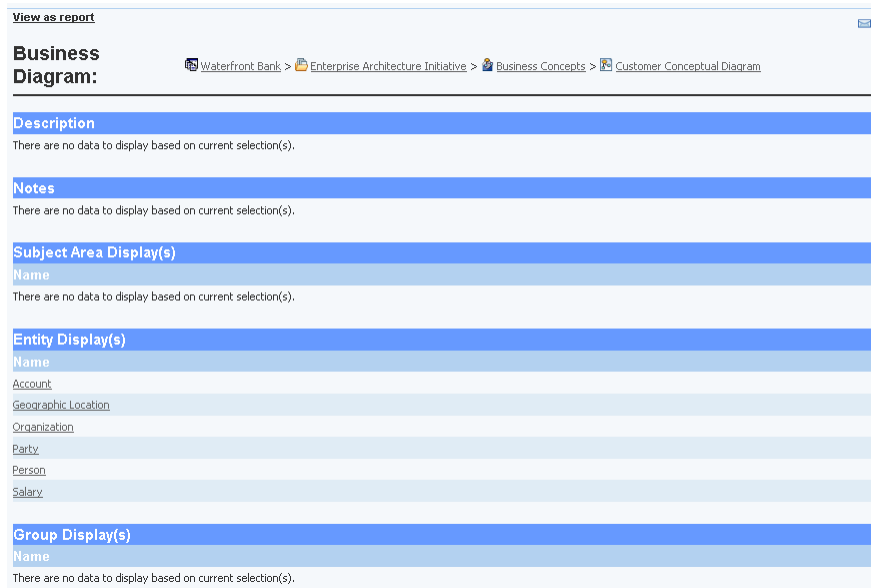
## SUPPORT FOR ER/STUDIO BUSINESS ARCHITECT

### BROWSE ER/STUDIO BUSINESS ARCHITECT REPORTS

Hover your mouse over the name of an ER/Studio BA diagram and a small image of the object is presented.

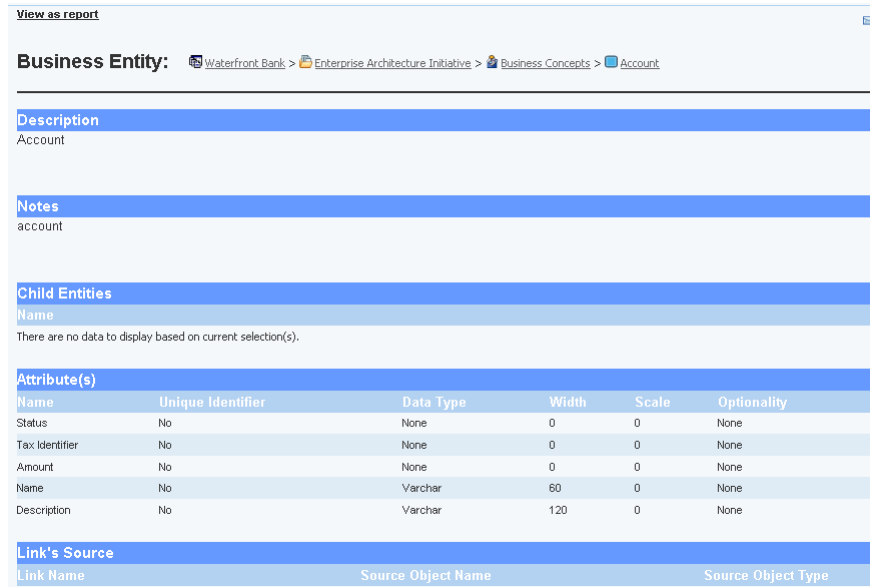


Click the name of an ER/Studio BA object and the basic report appears for that object.



Drill-down through the basic report to see detail reports for other objects. For example, clicking the name of an entity in the Entity Display(s) area of the basic Business Diagram report presents a Business Entity report.





There are detail reports for the following objects:

- Diagrams
- Annotation
- Assignment
- Diagram
- Business Entity
- Business Event
- Gateway
- Group
- Business Link
- Message Flow
- Business Model
- Business Process
- Business Project
- Process Property
- Relationship
- Sequence Flow
- Subject Area
- Business Task
- Business Trigger
- Usage Report
- Workspace Reports

### LIMIT SEARCH TO ER/STUDIO BUSINESS ARCHITECT OBJECTS

When searching using the Advanced Search capability you can choose which object to search through.

- Clicking All searches ER/Studio BA and ER/Studio DA objects.
- Clicking Data searches ER/Studio DA objects only.
- Clicking Business searches ER/Studio BA objects only.

The screenshot displays the Embarcadero Technologies search interface. At the top, the logo and navigation links (Home, Explore, Reports, Activity, Admin) are visible. The main search area includes a text input field for 'Search Text' and a checkbox for 'Include matches for similar-sounding words'. Below this, the 'Filters' section is highlighted with an orange oval, showing 'Scope in:' with three radio button options: 'All', 'Data' (which is selected), and 'Business'. Other filter options include 'Modification' (set to 'anytime'), 'Object Type', and 'Property'. The 'Sorting' dropdown is set to 'Relevance', and 'Pagination' is set to '10 results per page'. A 'Search' button is located at the bottom left of the filter area.