Product Documentation

Team Server / Repository

User Guide

Version 2016 (16.1.4)

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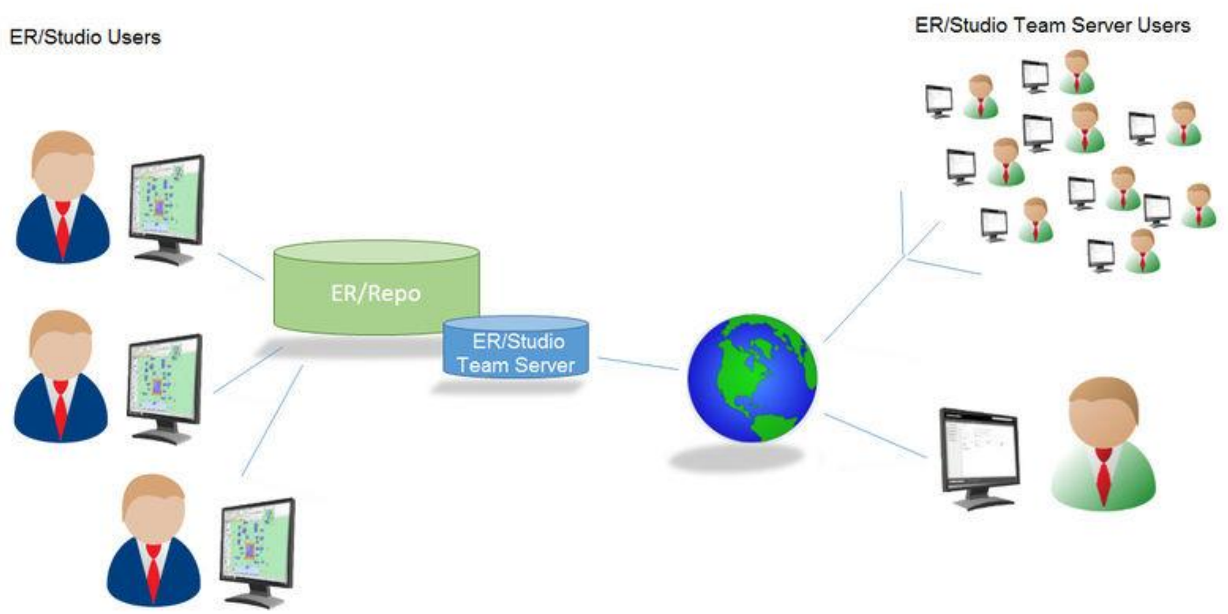
What Is Team Server

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.

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.

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. 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 Team Server internally, via your corporate intranet, or externally, via the internet. This way, you can access all the information you need from anywhere.

User Guide

This volume of help describes how to use Team Server as a authenticated user.

Topics

- Connecting to Team Server
- Searching
- Working with Resources:
  - Glossaries
  - Terms
  - People
  - ER Objects
  - Data Sources
    - Login Credentials
- Using Reports
- User Interface

See Also

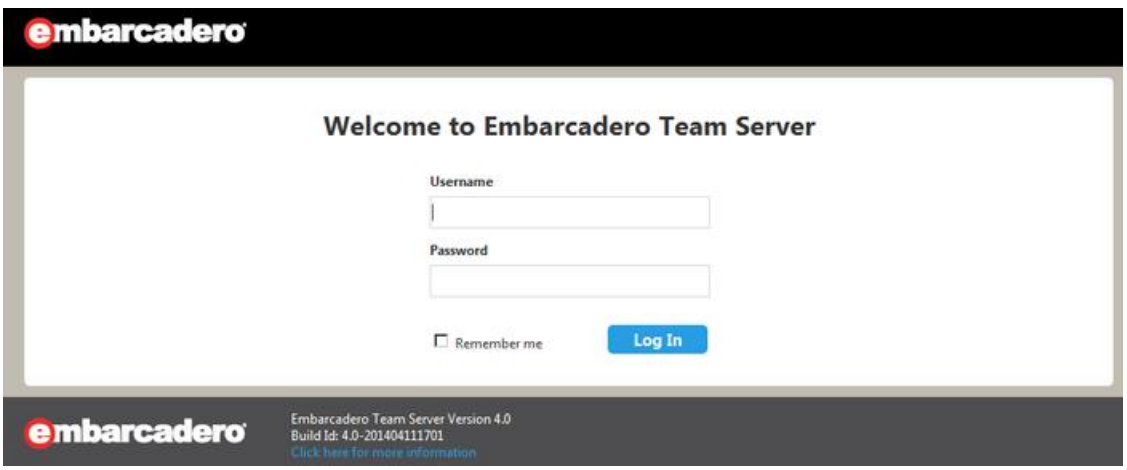
- Overview of the User Interface
- Administrator Guide

Connecting to Team Server

Go Up to [User Guide]

To connect to a running instance of Team Server:

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



You should now be logged in to Team Server. If you are unsure of what to do next, the Start Here Page will guide you.

For further information see the **User Guide**.

See Also

- Troubleshooting, Connecting to Team Server
- Starting Team Server
- Login Page

Configuring Your User Profile

When you are a social user, other social users can search for you and see details about you in your **Description** page.

To configure the information in your description page:

1. Open your person page. For example, click your username or user image in your **Home** page.
2. Click **Edit** on the upper-right corner of your person page.
3. In the **Configure Profile** page:
    1. In **Photo**, click **Browse** and select an image file that you want to represent you in **Team Server**.
    2. Fill **Title** with your job title. This field is mandatory.
    3. You can enter in **First Name** your display name, which **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

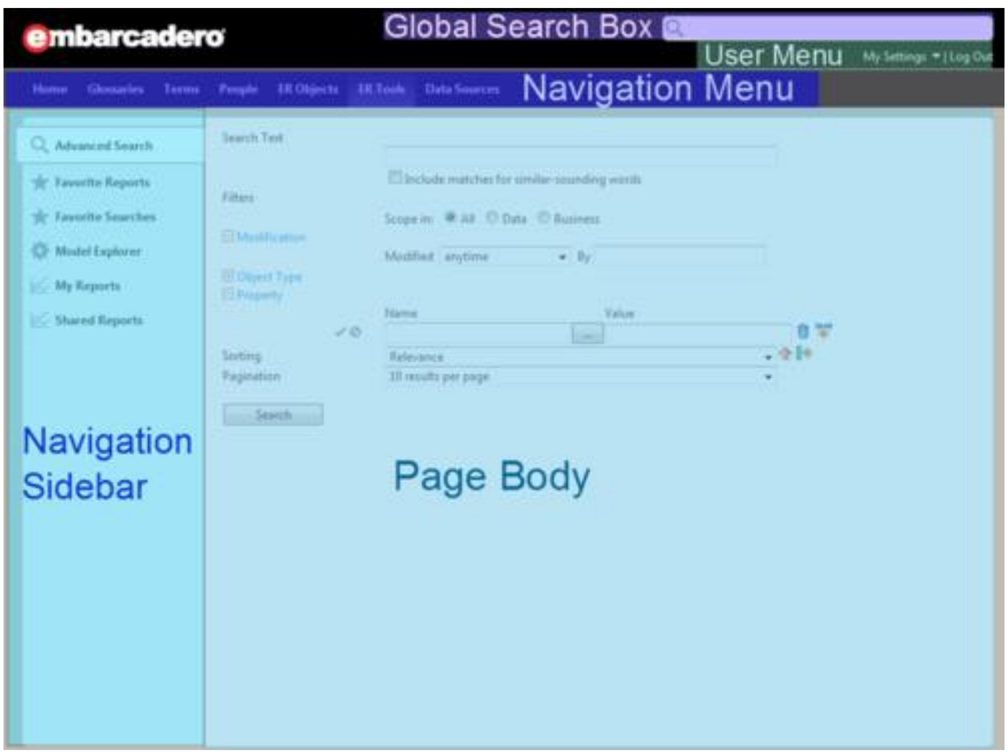
Using Social Features

Team Server provides two different user profiles: social and non-social. The social version of 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 Team Server offers to social users. These features are not available for non-social users. See Overview of User Experiences to understand the main differences between these two experiences.

Interface for Social Users

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

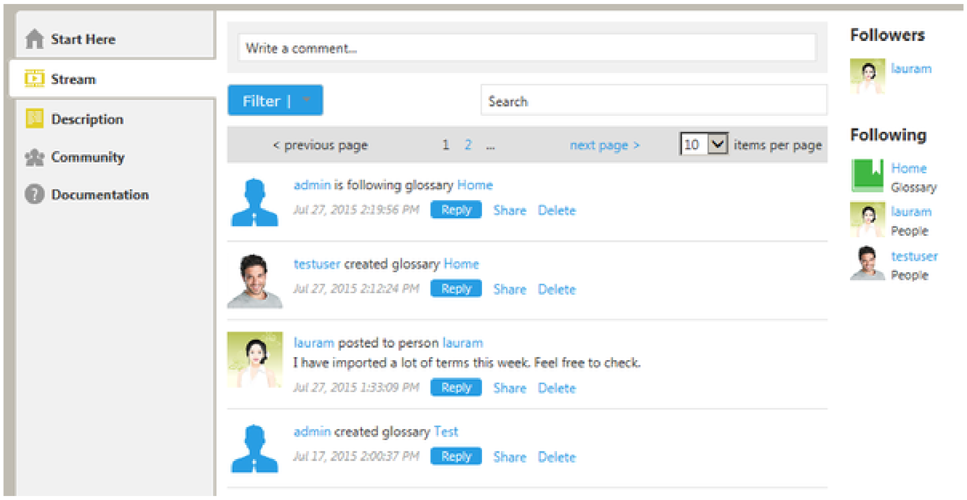


Interaction with Resources

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.



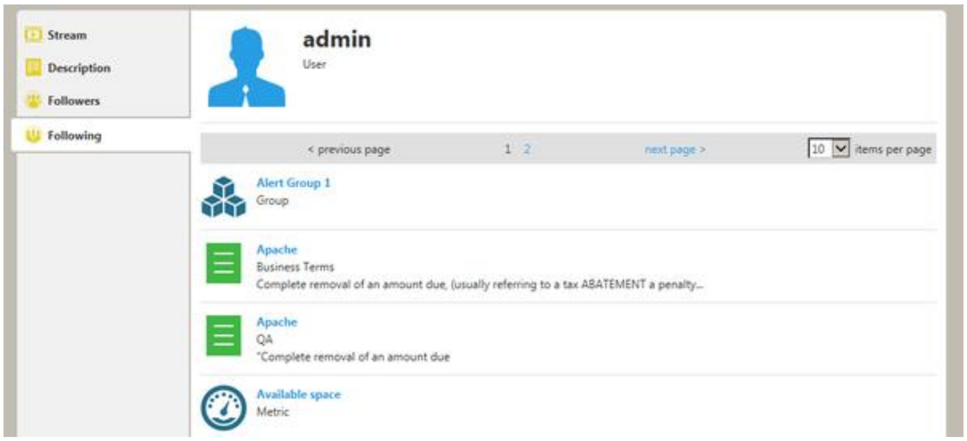
- Discussions

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: 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 are following edit resources, post comments to resources, and so on. The Following a Resource feature provides a practical tool for the personalization of the system according to the user's interests. See Following a Resource for more information.



See Also

- Overview of User Experiences
- Overview of User Roles
- Overview of the User Interface

Using Reports

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.

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

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

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

Topics

- Generating a Shared Report
- Adding a Shared Report to Favorite Reports
- Sending Reports By Email

See Also

- My Reports
- Solution Browser
- Web Adhoc Query and Reporting Wizard

Adding a Shared Report to Favorite Reports

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

To make a shared report favorite:

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

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

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

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

See Also

- Generating a Shared Report
- Favorite Reports

Generating a Shared Report

To generate a shared report:

1. Open the Solution Browser page: ER Tools > Shared Reports.
1. Under **Shared Reports**, click either **Business Reports** or **Technical Reports**.
2. 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.

3. 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 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: ER Tools > **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.

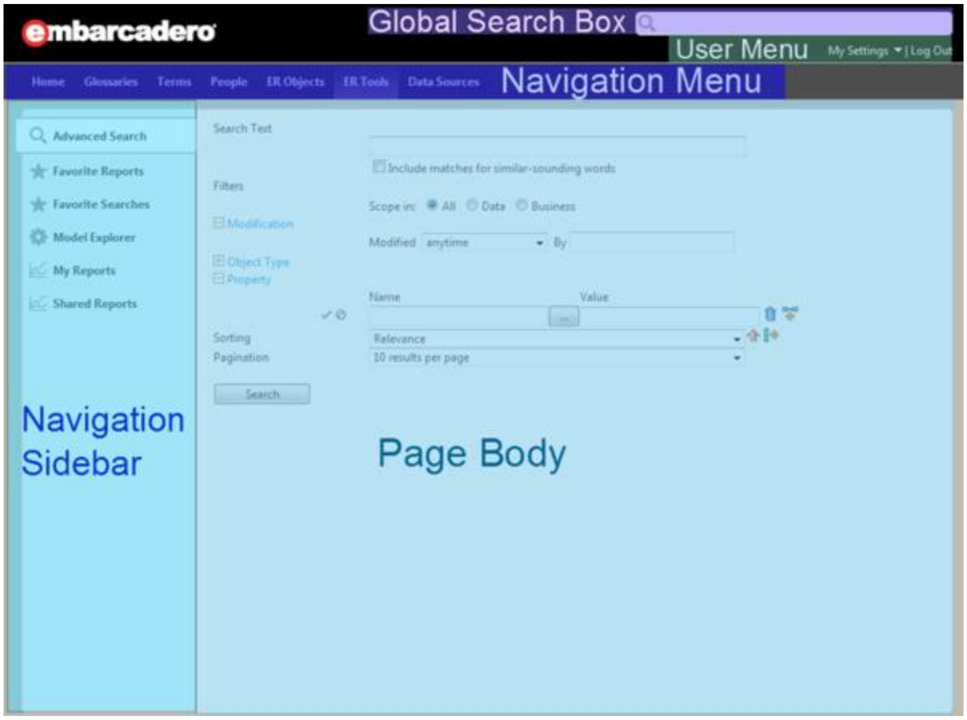
4. On the **Shared Report Configuration Page** page that opens:
    1. Choose the parameters for your report.
    2. In the **View as** combo box, choose the desired type of output for the report results: html, pdf or xls.
    3. Click **Send by Email**.
5. In the **Email Report** dialog that opens: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

See Also

- Generating a Shared Report
- Adding a Shared Report to Favorite Reports
- Enabling Emailing Search Results and Reports
- Favorite Reports

Overview of the User Interface

The **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 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 Team Server:

- [Login Page]()
- [Resource Pages]()
- [Report Pages]()
- [Search Pages]()

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

- Home: Your personal home page, including documentation links, getting started content videos and your **Stream** page, that shows your activity and the activity of the resources that you are following.
- Glossaries: The **Glossaries** page is a search page that allows you to search for glossaries, edit, or create new ones.
- Terms: The **Terms** page is a search page that allows you to search for terms, edit, or create new ones.
- People: The **People** page is a search page that allows you to search, edit, or create new users.
- ER Objects: The **ER Objects** page is a search page that allows you to search for ER objects.
- ER Tools: Allows you to navigate to the business and technical reports, and create custom reports. From here you can also access your favorite and shared searches and reports.
- Data Sources: The Data Sources page is a search page that allows you to create or search for data sources, login credentials and data sources groups.

See Also

- User Guide

Global Search Box

The **Global Search Box** is a search box which is always available in the upper-right corner of the 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, 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, please see: Global Search Box

See Also

- Search Pages

Online Help for Team Server 2016

Getting Started

- ★ What's New
- Release Notes
- Installation Notes | Database Server Requirements
- Install and Configure Team Server and Repository
- Upgrading Team Server and Repository
- Tutorials

Administrator Guide

- Starting Team Server
- Data Synchronization
- Security
- Scheduling
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- Configuration
    - Admin Page
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    - Changing the Interface of Team Server
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    - Optimizing System Performance
- Architecture
- Tools

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User Guide

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- Working with Resources:
  - Glossaries
  - Terms
  - People
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  - Data Sources
    - Login Credentials
- Using Reports
- User Interface

Developer Guide

- Obtaining Authorization to Use the API
- Browsing Resources
- Managing Resources
- Enabling Secure API Requests
- API Reference

ER/Studio Team Server Core
Enterprise model and metadata collaboration
for context, consistency, and compliance

Resource Pages

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

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

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

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

See Also

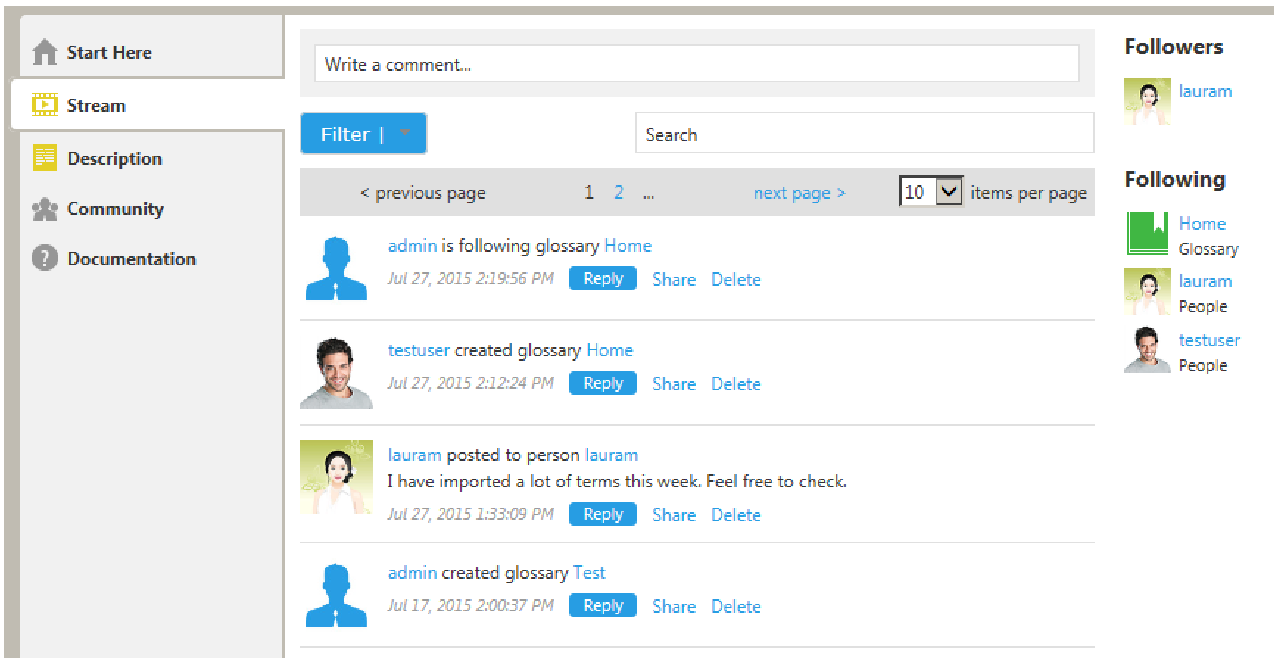
- Searching

Stream

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

This page contains of the following:

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



Stream Header

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

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

Stream Activity

The stream activity is a list of activity items.

Each activity items consists of:

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

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

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

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

Stream Sidebar

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

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

See Also

- Posting a Comment to a Resource
- Following a Resource
- Resource Pages

Discussions

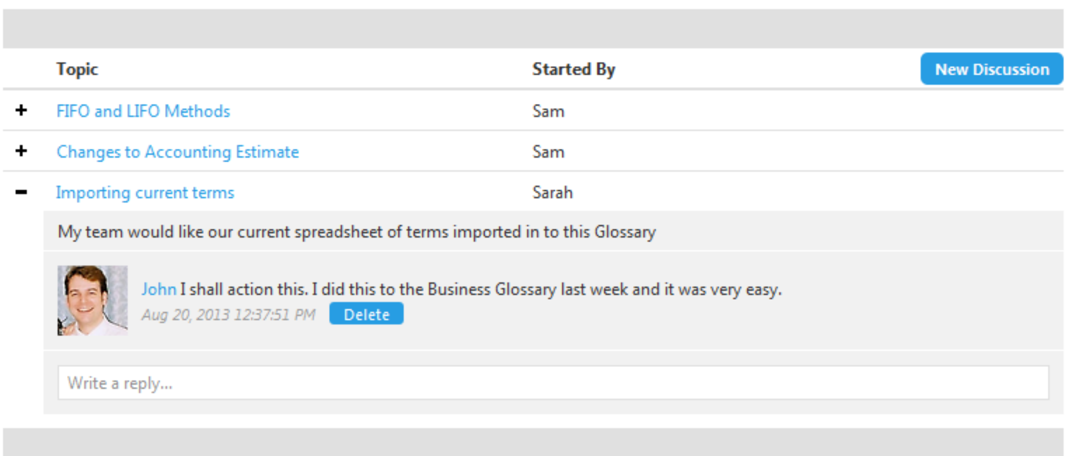
The **Discussions** subpage of glossary pages, term pages, ER object pages, and data source pages lets social users discuss any resource of one of those types.

To start a new discussion, click **New Discussion** on the top-right corner.

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

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

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

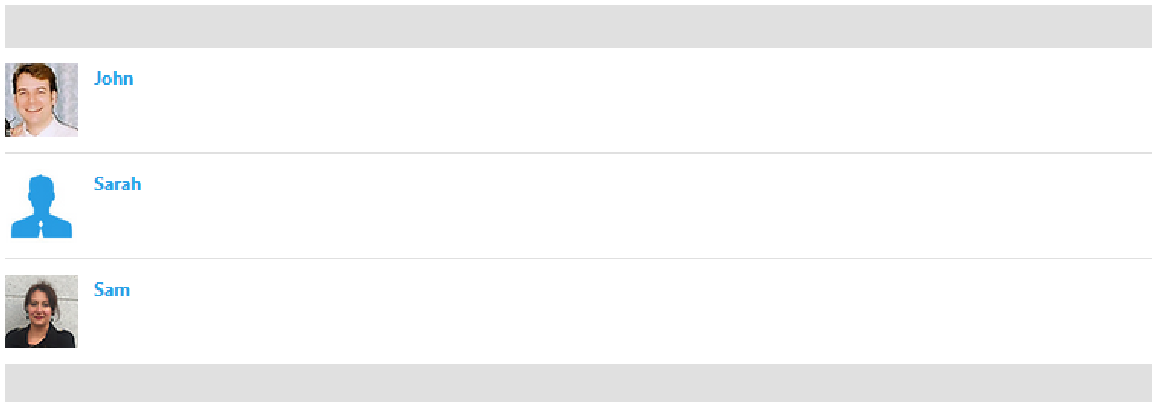


Each entry for a reply to the original discussion message displays:

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

Followers

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



See Also

- Working with Glossaries
- Working with Terms
- Interacting with People
- Working with ER Objects
- Working with Data Sources

Glossary Pages

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

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

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

Glossary Pages Header

The glossary page header shows:

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

On the top-right corner:

- If you are the owner of the glossary or a 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.
Permissions	Opens the users and groups permissions tab for the glossary.

See Also

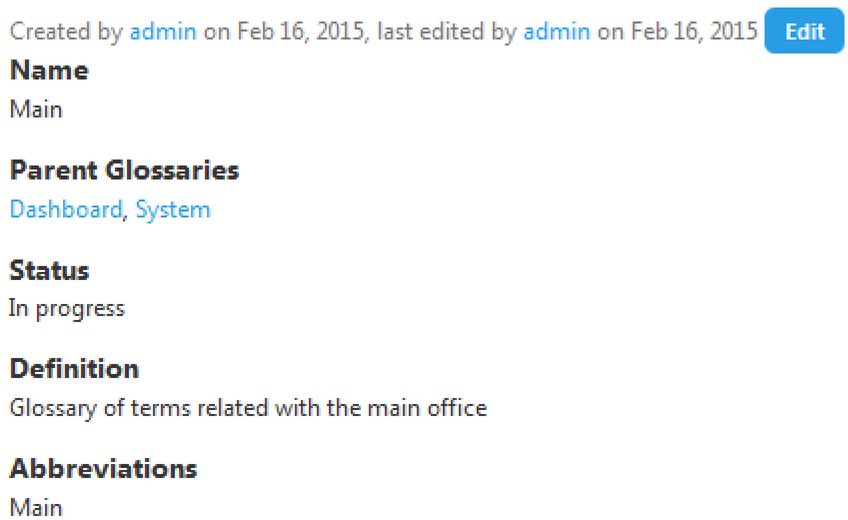
- Working with Glossaries

Glossary Description

The **Description** subpage of glossary pages provides detailed information about a glossary.

The page is divided in two columns:

- 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.
Parent Glossaries	Parents of the glossary.
Status	Text describing the status of the glossary.
Definition	Detailed description of the glossary.
Abbreviations	List of abbreviations of the glossary.
Aliases/Synonyms	List of aliases and synonyms of the glossary.
Additional Notes	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

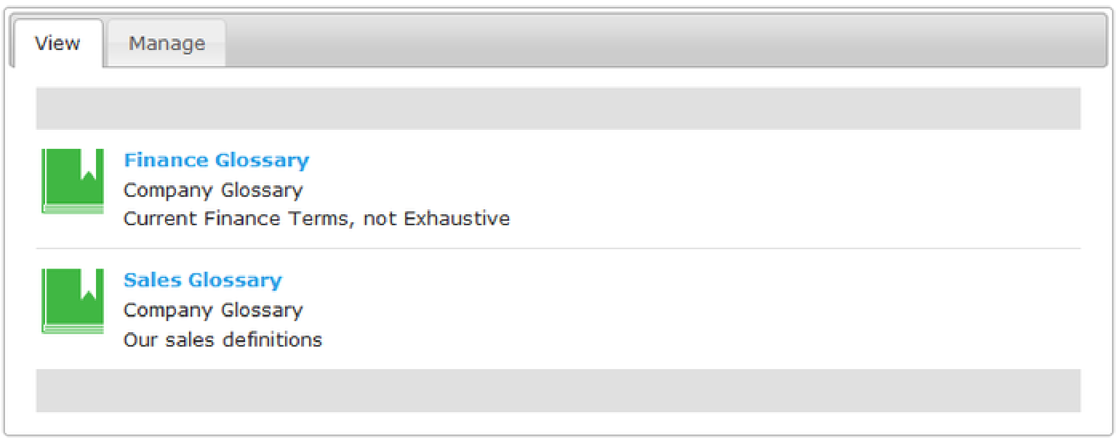
Children

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.

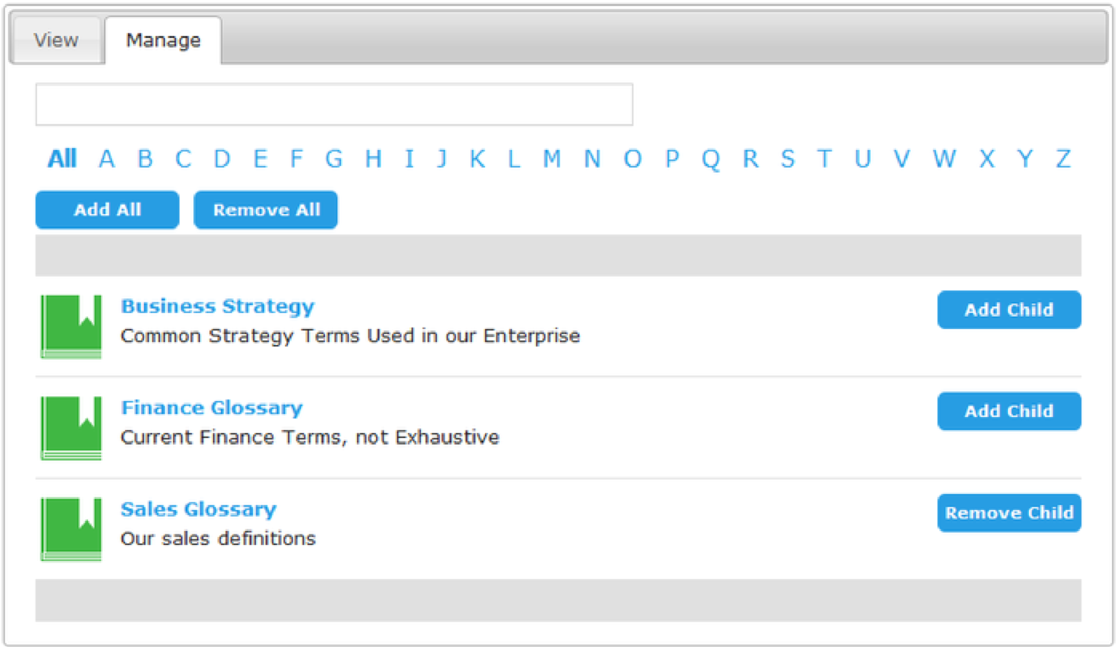


Manage Tab

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

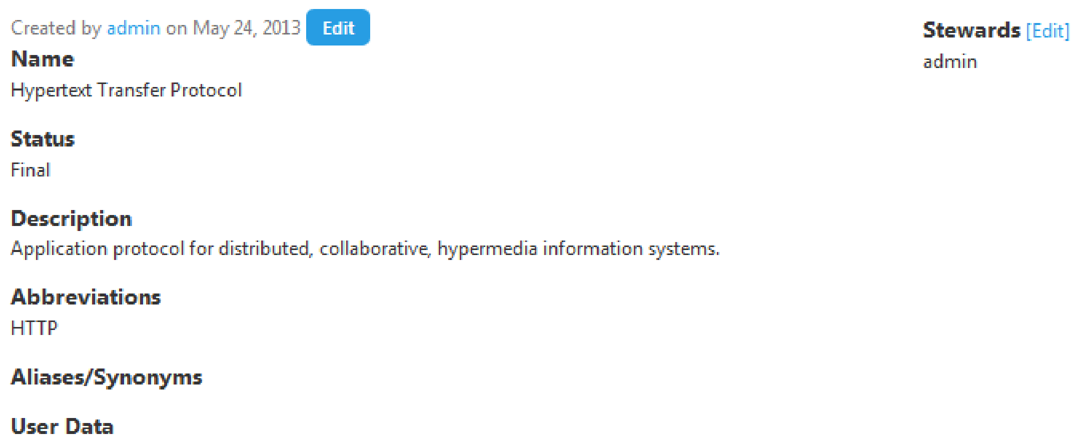
- Working with Terms
- Working with Glossaries
- Working with ER Objects

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.
Definition	Detailed description of the term.
Abbreviations	List of abbreviations of the term.
Aliases/Synonyms	List of aliases and synonyms of the term.
Adidtional Notes	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

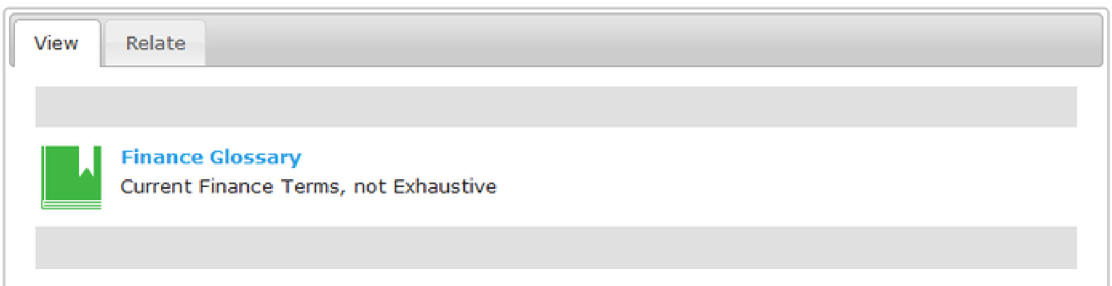
Related Glossaries

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.



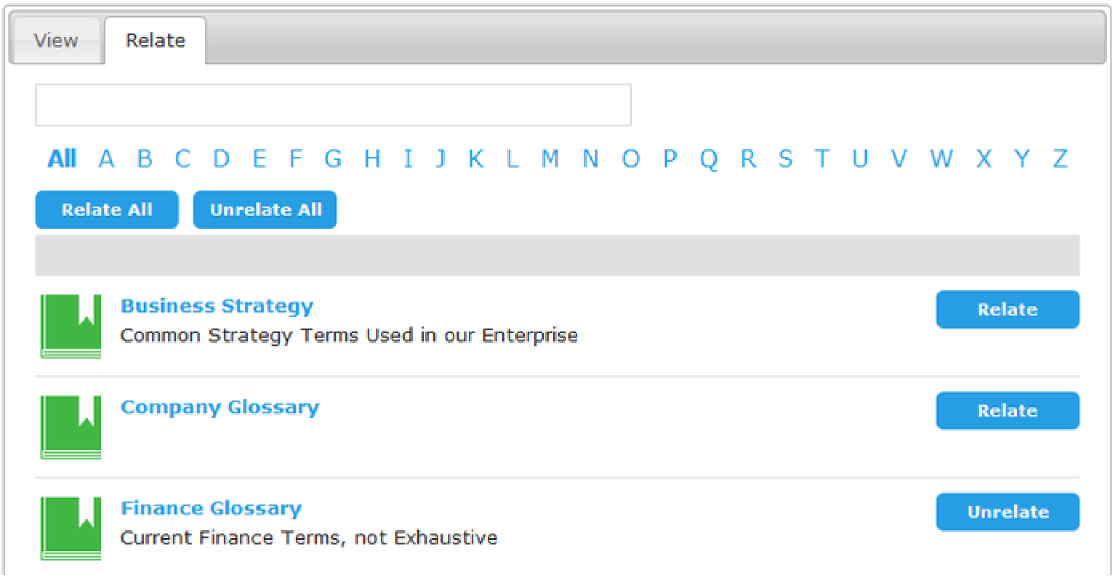
Relate Tab

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.

Related Glossaries



See Also

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

Related Terms

The **Related Terms** subpage (this subpage is called **Terms** in glossary pages) lists the terms related to/from the current resource.

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

The page is divided in two tabs:

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

View Tab

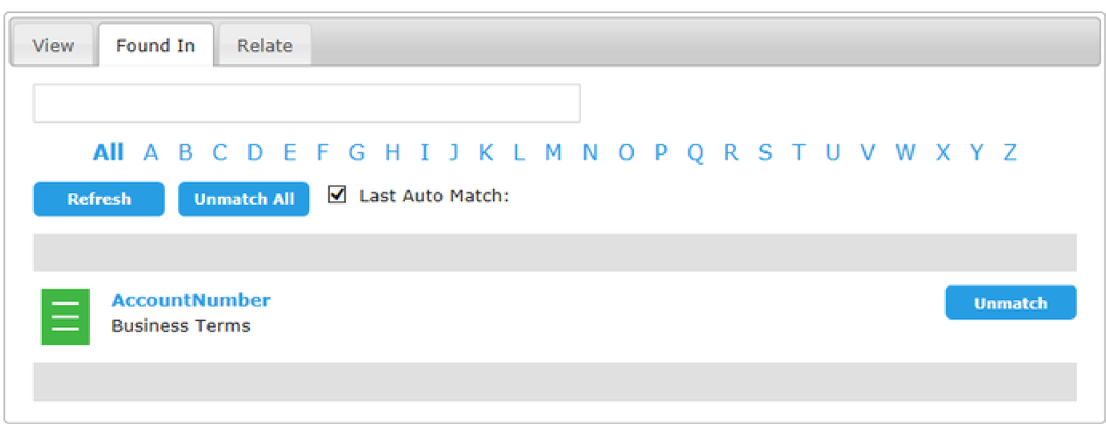
The content of the **View** Tab is a list of related Terms for the resource that you are currently viewing. In ER Objects, there will be all the Terms that are related or matched to the Term. In the Glossary subpage there will be related Terms to the Glossary or to the *Parent Glossary*.

Found In Tab

The content of the **Found In** tab is similar to the content of the Terms page. For example, it has a search box, and letters to navigate the matching terms.

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

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



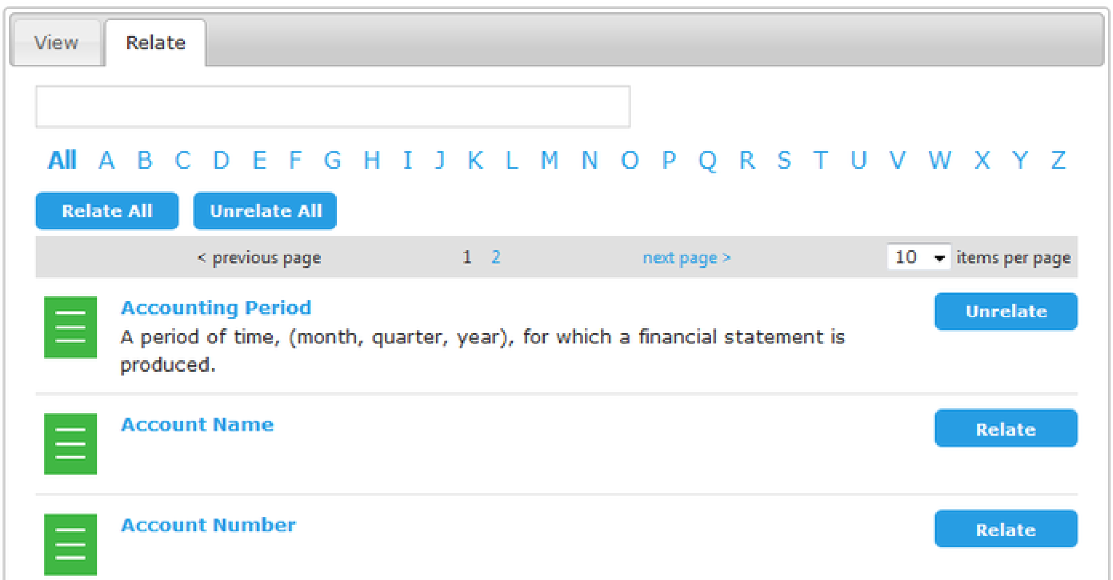
Relate Tab

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

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

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

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



See Also

- Adding a Term to a Glossary
- Associating a Term with Another Term
- Associating an ER Object with a Term
- Matching an ER Object with Terms

Related ER Objects

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

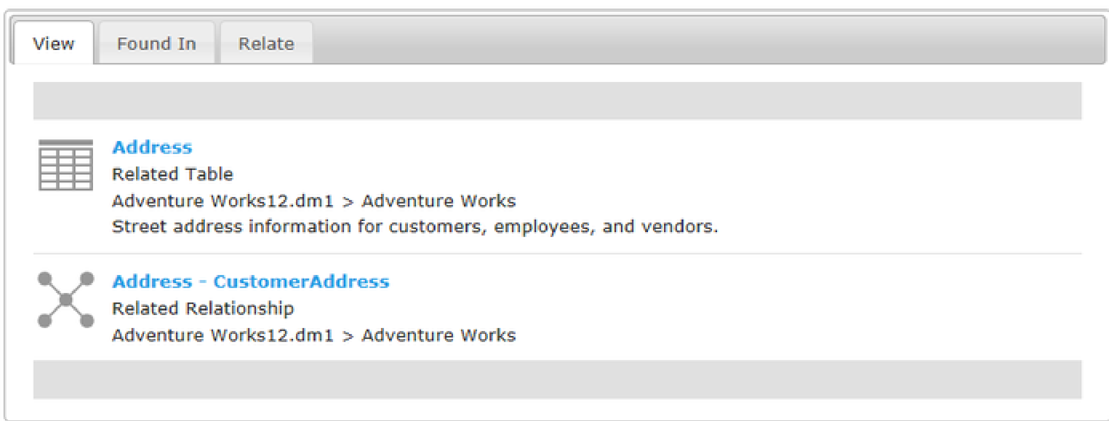
You can use the **related ER Objects** page to relate or unrelate and match or unmatch ER objects to the current term.

The page is divided in three tabs:

- 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. Team Server automatically matches any ER object containing the current term.

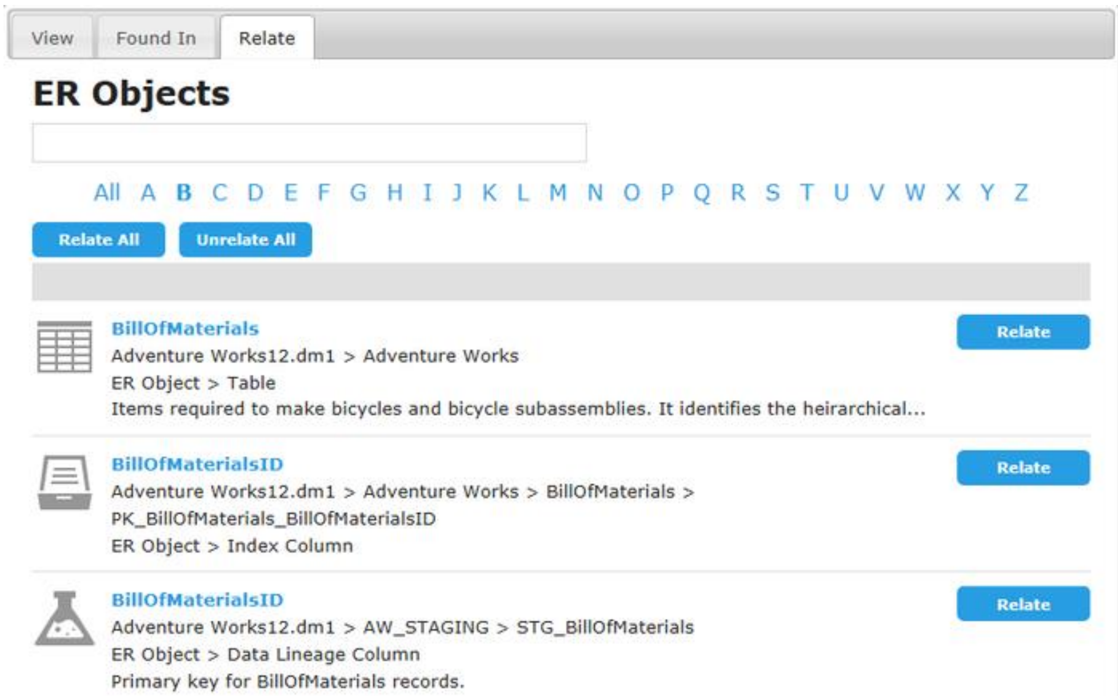
On the right-hand side of the ER object entries, you can click **Unmatch** to unmatch matching ER objects, or click **Re-Match** to match ER objects that you manually unmatched.

Relate Tab

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

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

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



See Also

- Associating a Term with an ER Object
- Matching a Term with ER Objects

Person Pages

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

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

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

Person Pages Header

The person page header shows:

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

On the top-right corner:

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

Person Pages Sidebar

Person pages provide a sidebar with the following items:

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

See Also

- Interacting with People

Configure Profile

Home | click your name or image | **Edit**.

From the **Configure Profile** page you can configure your user profile to share some of your personal data with other Team Server social users.

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

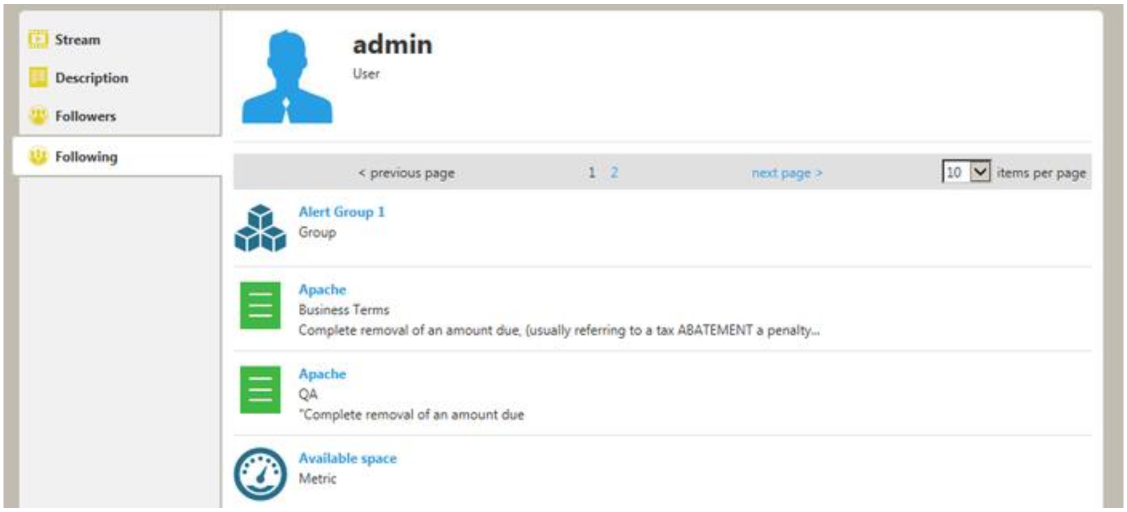
Item	Description
Photo	Click **Browse** to open a file manager dialog where you can select a local image file. After you select an image file, click **Upload** to upload the image to Team Server and use it as your user image. **Note:** Under the **Browse** button there is a description of the format and size limitations that Team Server enforces on user images. If your image does not fit those limitations, uploading your image fails.
Title	Your job title. For example, "Quality Assurance Engineer" or "Technical Writer".
First Name	Your first name. For example, "Jane" or "John".
Job Description	A brief description of your job responsibilities.
Phone	Your phone number.
Email	Your email address.
Stream Moderation	You can toggle 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.

See Also

- Configuring Your User Profile
- Stream

Following

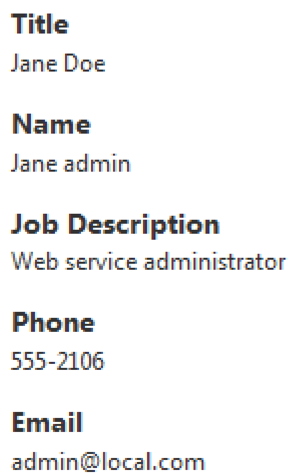
The **Following** subpage of person pages lists the resources (glossaries, terms, people, ER objects, data sources) that the user is following.



See Also

- Interacting with People

User Description



The **Description** subpage of person pages provides detailed information about a user.

The page provides the following fields:

Item	Description
Title	User display name. Team Server displays the user display name in the header of person pages, below the user name.
Name	First and last names of the user.
Job Description	Detailed description of the user's job.
Phone	Telephone number where you can reach the user.
Email	Email address of the user.

See Also

- Interacting with People

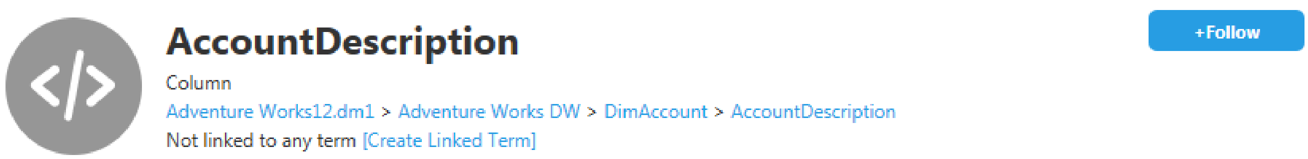
ER Object Pages

ER Object pages provide detailed information about specific ER objects, in addition to links to related ER objects.

You can access ER object pages by browsing and searching on **Team Server**.

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

ER Object Pages Header



The ER object page header shows:

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

On the top-right corner you can click + **Follow** to start following the current ER object, or **Following** to stop following it. See Following Resources.

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 (only for physical models)	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.
Permissions	Opens the users and groups permissions tab for the current diagram, model or submodel.

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

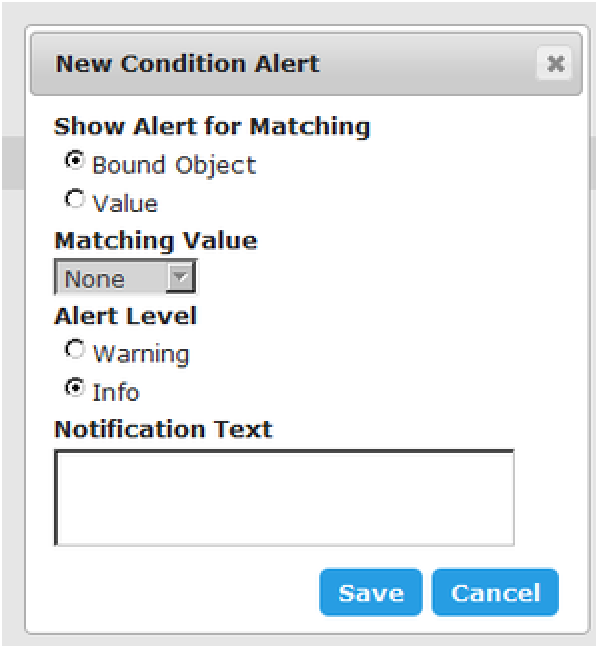
Non-Social Users

For Non-Social users please see: http://docwiki.embarcadero.com/TeamServer/ERStudio/XE7/en/ER_Object_Pages

See Also

- Working with ER Objects

Condition 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, **Team Server** displays on the header of an ER object page, the alert message and icon defined in the alert condition.

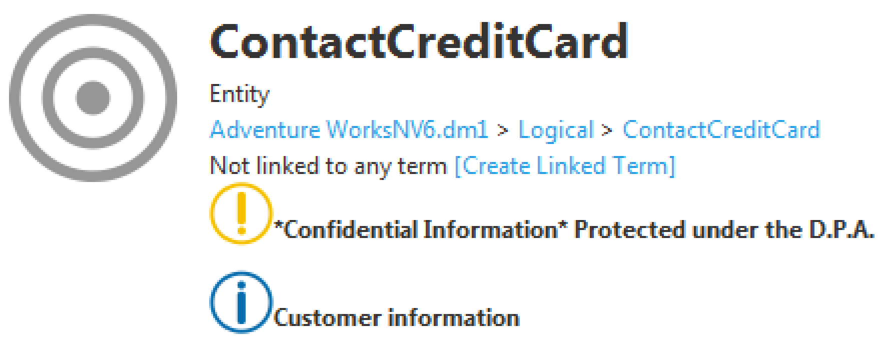
You can access the Alerts subpage by clicking the Alerts Icon at the common sidebar from a Security Property or Attachment page.

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:

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Show Alert for Matching</td><td>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.</td></tr>
<tr><td>Alert Level</td><td>The level of the alert, which determines which icons 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.

</td></tr>
<tr><td>Notification Text</td><td>Text of the alert.
Team Server displays this text on the header of matching ER objects, on the right-hand side of the icon representing the Alert Level.</td></tr>
<tr><td>Delete Condition (only super users and alert condition author)</td><td>Deletes the target condition.</td></tr>
</table>

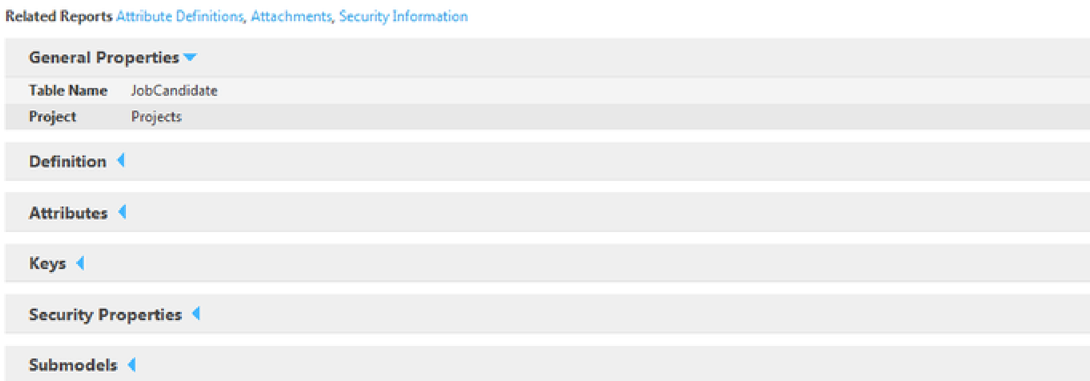
Note:Team Server saves changes to field values as fields lose focus.

See Also

- Configuring Sensitive Data Alerts

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
  - Business Data Object
  - Data Lineage Column
  - Data Lineage Source/Target
  - Data Lineage Table

        - Data Movement Rule
        - Default
        - Diagram
        - Dictionary
        - DL Transformation
        - Domain
        - Entity/Table
        - Key/Index
        - Lineage Data Flow
        - Lineage Data Stream
        - Model
        - Reference Value
        - Relationship
        - Security Property
        - Security Type
        - Submodel
        - User Datatype
        - View
        - View Column
    - ER Object description pages for **ER/Studio Business Architect** object types:
        - BM_Annotation
        - BM_Assignment
        - BM_Association
        - BM_BusinessAttribute
        - BM_BusinessElement
        - BM_BusinessEntity
        - BM_BusinessUnit
        - BM_DataElement
        - BM_DataObject

- BM_DataSource
- BM_DataStore
- BM_Diagram
- BM_Domain
- BM_Event
- BM_Gateway
- BM_Group
- BM_Lane
- BM_Link
- BM_Model
- BM_Message_Flow
- BM_PDiagram
- BM_Pool
- BM_Process
- BM_Project
- BM_Property
- BM_PProperty
- BM_ReferenceColumn
- BM_ReferenceEntity
- BM_Relationship
- BM_Rule
- BM_Sequence_Flow
- BM_Steward
- BM_SubjectArea
- BM_Task
- BM_Trigger
- BM_Usage
- BM_Workspace

Data Source Pages

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

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

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

Data Source Pages Header

The data source page header shows:

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

On the upper-right corner:

- You can click + **Follow** to start following the current data source, or **Following** to stop following it. See Following Resources.

Data Source Pages Sidebar

Data source pages provide a sidebar with the following items:

Note: The **Related ER Model** tab is available if there is an **ER/Studio Team Server** License registered.

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.
Permissions	Opens the users and groups permissions tab for the data source.

See Also

- Working with Data Sources

Data Source Description

The **Description** subpage of data source pages provides detailed information about a data source.

The page is divided in two columns:

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

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 data source.
Definition	Detailed description of the data source.
Production Level	Production Level of the data source.
Location	Location of the data source.
Application Affinity	Application Affinity of the data source.
Status	Status of the data source.
Abbreviations	List of abbreviations of the data source.
Aliases/Synonyms	List of aliases and synonyms of the data source.
Additional Notes	Custom information related to the data source that only you can see. Other users, including super users, cannot see the information in this field.
Type	Type of database management system (DBMS) of the data source. The following DBMS are supported: DB2 LUW, DB2 z/OS, InterBase, Firebird, JDBC, MySQL, ODBC, Oracle, SQL Azure, SQL Server, Sybase, Sybase IQ.
<Database Management System Fields>	Depending on the **Type** of data source, 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.

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.

Related ER Models

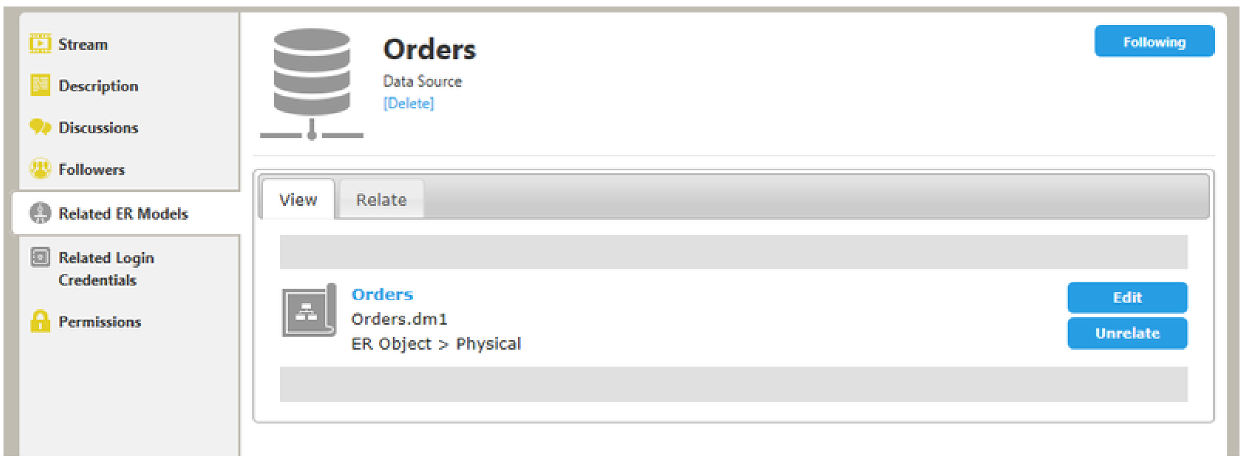
The **Related ER Models** subpage of Data Sources lists the ER Models that are either related to the current Data Source, or that can be related to the Data Source.

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.



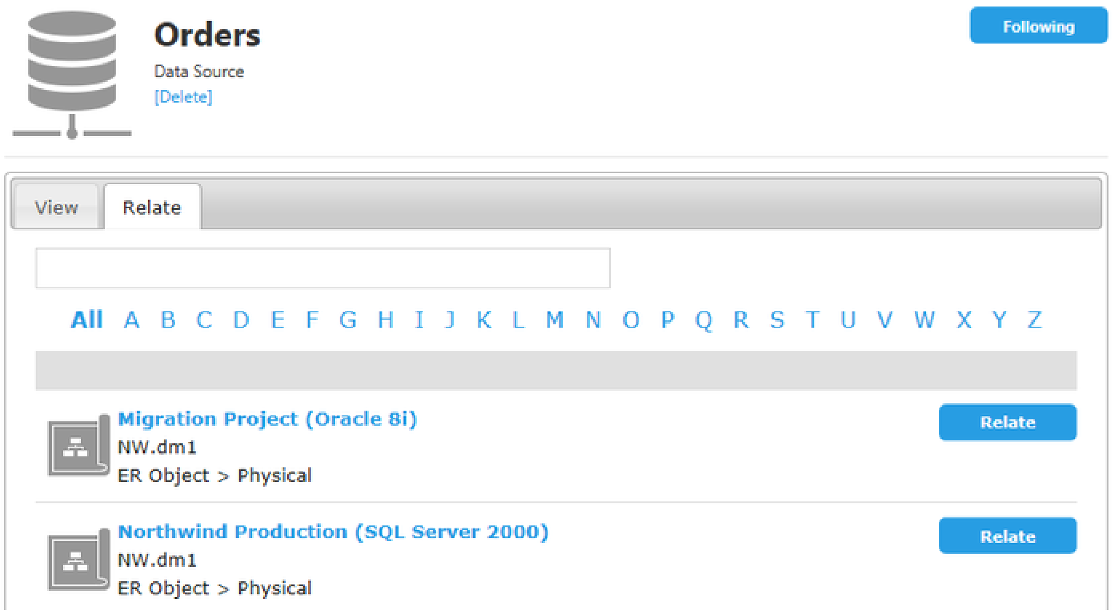
Relate Tab

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.

Related ER Models



See Also

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

Related Login Credentials

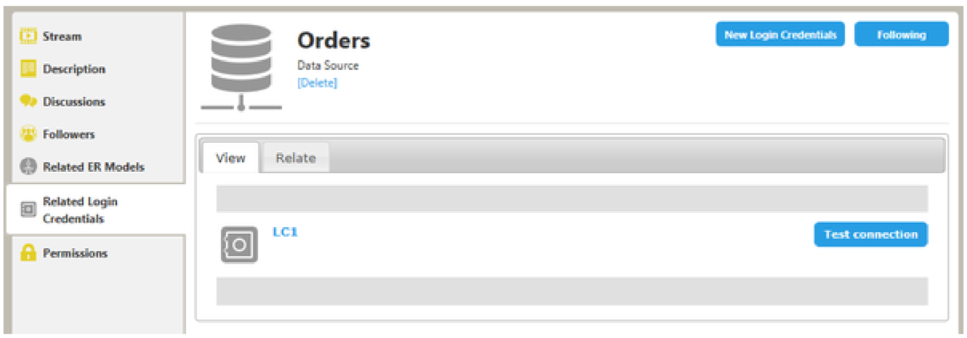
The **Related Login Credentials** subpage of Data Sources lists the Login Credentials that are either related to the current Data Source, or that can be related to the Data Source.

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. For **Test Connection** issues please check troubleshooting guide.



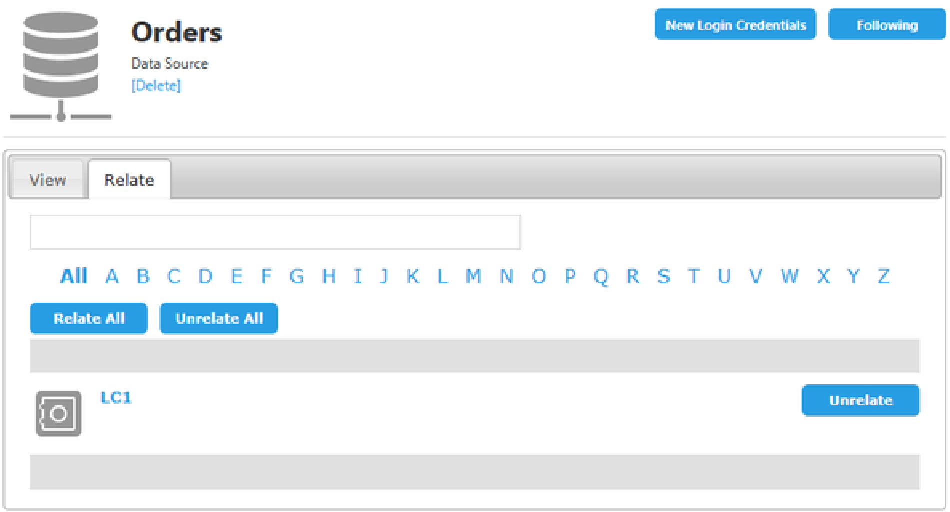
Relate Tab

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.

Related Login Credentials



See Also

- Data Source Pages
- Login Credential Pages
- Working with Data Sources

Group Pages

Groups pages provide information about groups: activity, details, discussions about them, people who are following them, members, relationships, and permissions.

To open a group page, follow a group link.

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

Group Pages Header

The group page header shows:

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

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

Group Pages Sidebar

Group pages provide a sidebar with the following items. The item shown may change depending on the type of group.

Item	Description
Stream	Opens the activity stream of the current group. The sidebar shows **Followers** (a list of users that are following the current group). See the Followers subpage.
Description	Provides detailed information about the group.
Discussions	Opens the list of discussions about the current group.
Followers	Shows a list of users that are following the current group.
Members	Shows the list of Data Sources or Alerts that are included into the current group depending of the type of group.
Permissions	Opens the users and groups permissions tab for the group.

See Also

- Working with Groups
- Working with Data Sources

Group Description

The **Description** subpage of group pages provides detailed information about a group.

The page is divided in two columns:

- 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.
Definition	Detailed description of the term.
Abbreviations	List of abbreviations of the term.
Aliases/Synonyms	List of aliases and synonyms of the term.
Additional Notes	Additional information about the business object.

Stewards Column

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

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

See Also

- Working with Data Sources
- Data Source Fields for a Specific Database Management System

Login Page

The **Login** page lets you enter your user credentials to access an Team Server installation.

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

This page provides the following items:

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

See Also

- Connecting to Team Server

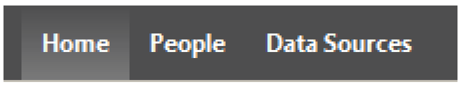
Navigation Menu

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

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

Basic and Performance IQ Navigation Menu

This are the available features on the navigation menu when you do not have any license registered yet and when you have a **Performance IQ** license registered:



The navigation menu when you have no registered license allows you to have access to the following items:

Item	Description
Home	See recent activity of ER objects and people that your are following.
People	Search for users.
Data Sources	Search and manage Data Sources. Including Login Credentials.

ER/Studio Navigation Menu

When you have an **Team Server** license registered, you will access to the basic features explained previously and also to the following items:

Item	Description
Glossaries	Search for glossaries.
Terms	Search for terms.
ER Objects	Search for ER objects of the Reporting Repository.
ER Tools	Lets you navigate to the business and technical reports and create custom reports. From here you can also access your favorite and shared searches and reports.
Data Sources	Search and manage Data Sources, including the capability of relating models.

See Also

- Overview of User Experiences

Report Pages

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

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

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

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

Report Pages

This is a list of available report pages:

- Reports that super users can open from the Activity page:
  - Login Activity Details
  - Updated Object Details
  - Connection Activity Details

Connection Activity Details

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

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

The report contains the following columns:

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

See Also

- Activity
- Login Activity Details
- Updated Object Details

Login Activity Details

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

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

The report contains the following columns:

Column	Description
User Name	The name of the user that logged in.
User Description	The description of the user that logged in.
Login Time	The date when the user session started.
Connection Type	The connection type that the user consumed.

See Also

- Activity
- Connection Activity Details
- Updated Object Details

Updated Object Details

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

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

The report contains the following columns:

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

See Also

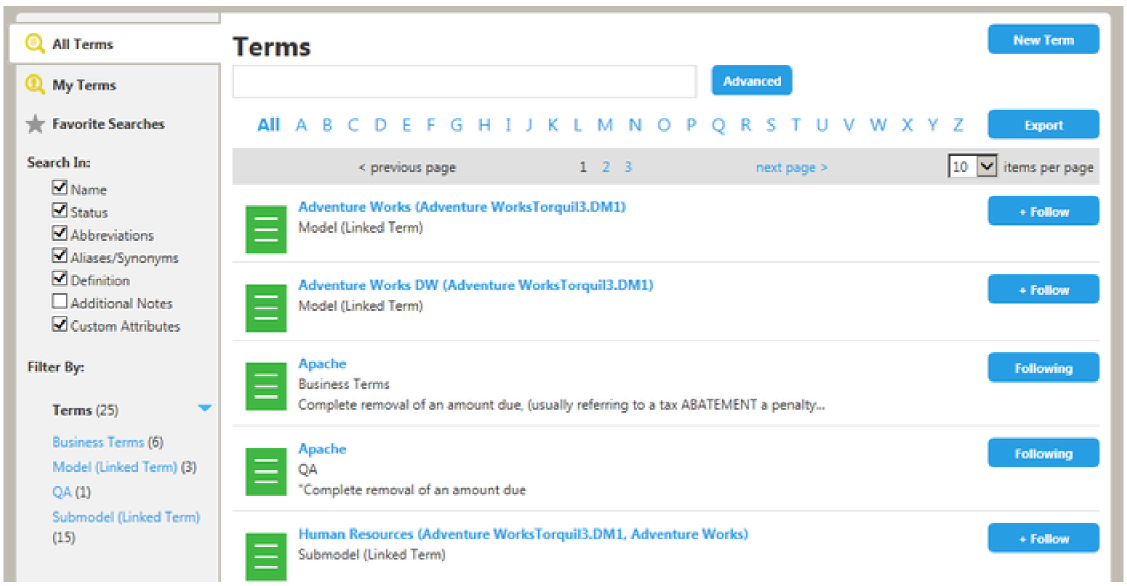
- Activity
- Connection Activity Details
- Login Activity Details

Search Pages

Search pages let you search for a certain type of resources within **Team Server**: glossaries, terms, people, ER objects, etc.

Search pages are only available for social users, and you can open them from the navigation menu.

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



For a list of search pages, see the following index.

Search Page Body

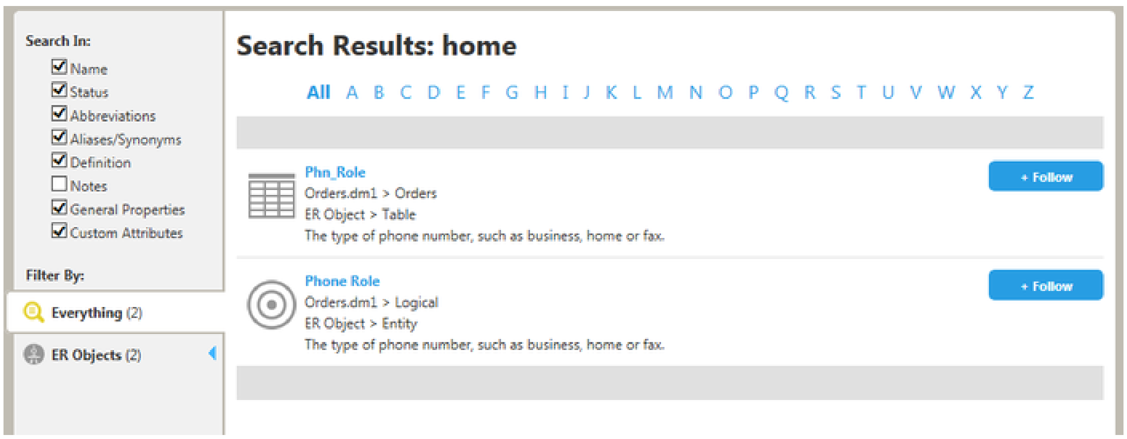
The body of every search page contains a header with at least the following items:

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

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

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

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



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

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

This pagination bar provides the following items:

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

Search Page Sidebar

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

Global Search Page Sidebar

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

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

- Name
- Aliases/Synonyms

- Definition
- Notes (searching includes both notes and additional notes)
- General Properties
- Custom Attributes

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

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

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

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

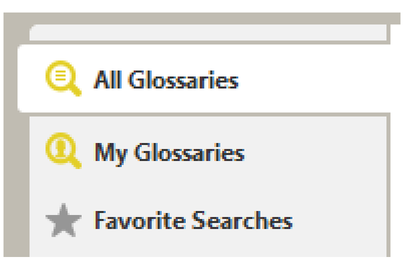
The **ER Objects** resource type, when listed under **Filter By**, has an icon on the right-hand side: . You can click that icon to display a list of subtypes (types of ER objects), and you can click any subtype to filter the search results by that type of ER object.

Resource-specific Search Page Sidebar

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

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

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



Search Pages Index

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

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

See Also

- ER Object Pages
- Navigation Menu

Glossaries

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

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

Item	Description
New Glossary	Opens the **New Glossary** dialog box to create a new glossary.
Export Glossaries	Allows you to export glossaries and terms to a CSV file.
Load Glossaries	Opens the **Load CSV File** page to load glossaries and terms from a CSV file.
Glossary Tool Tip	Opens the **Glossary Tool Tip** start page.

See Also

- Searching for a Resource of a Specific Resource Type
- Search Pages

Load CSV File

Glossaries | click **Load Glossaries**

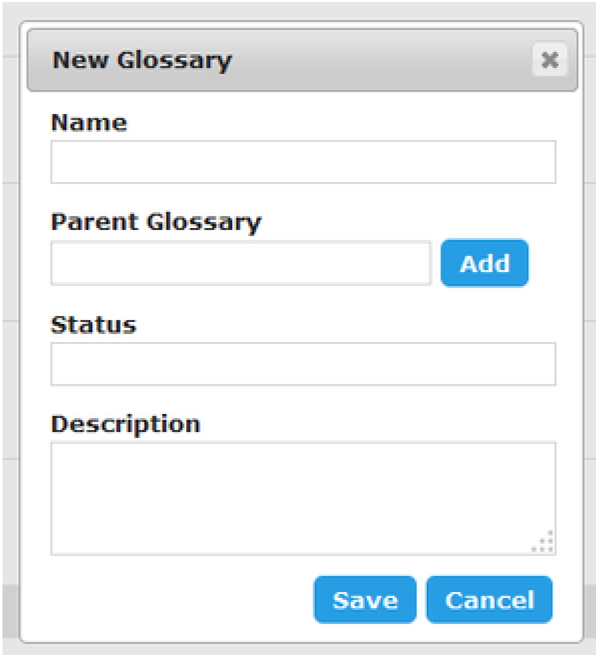
The **Load CSV File** page provides a field, **Choose a File**, where you can specify the path to a CSV file of glossaries and terms that you want to load.

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

See Also

- Loading Glossaries and Terms from a CSV File

New Glossary



Glossaries | click **New Glossary**

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

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

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

Item	Description
Name	The name of the glossary. This is the only field required to create a new glossary. As soon as you fill the **Name**, you can click **Save**. You can edit any other details later.
Parent Glossary	An existing glossary that is a parent of the new glossary. As you write, **Team Server** offers names of existing glossaries for autocompletion. After you write the name of the parent glossary, click **Add** to actually select it. After you select a parent glossary, you can click on the right-hand side of the parent glossary name to remove it, so that you can select a different parent glossary.
Status	Text that describes 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".
Description	Detailed information about the glossary, such as its purpose and audience.

See Also

- Creating a Glossary

Terms

The **Terms** page is a search page that lets you search for terms or create new terms.

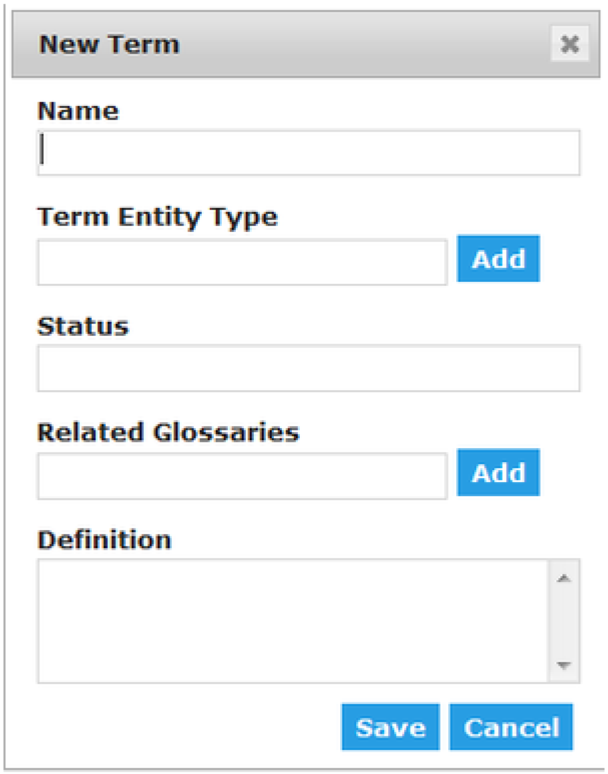
On the upper-right corner you can access the following command:

Item	Description
New Term	Opens the **New Term** dialog box to create a new term.

See Also

- Working with Terms
- Search Pages

New Term



Terms | click **New Term**

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

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

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

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

See Also

- Creating a Term

People

The **People** page is a search page that lets you search and create new **Team Server** users.

See Also

- Interacting with People
- Search Pages

ER Objects

The **ER Objects** page is a search page that lets you search for ER objects.

See Also

- Searching for a Resource of a Specific Resource Type
- Search Pages

Data Sources

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

To use the Data Source Advanced Search feature, click the link to the right of the search box.

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

Item	Description
New Data Source	Opens the **New Data Source** dialog box to create a new data source.
New Group	Opens the **New Group** dialog box to create a new group.

Advanced Search Feature

The data source advanced search feature allows you to add one or more search filters to narrow your search criteria.

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

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

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

See Also

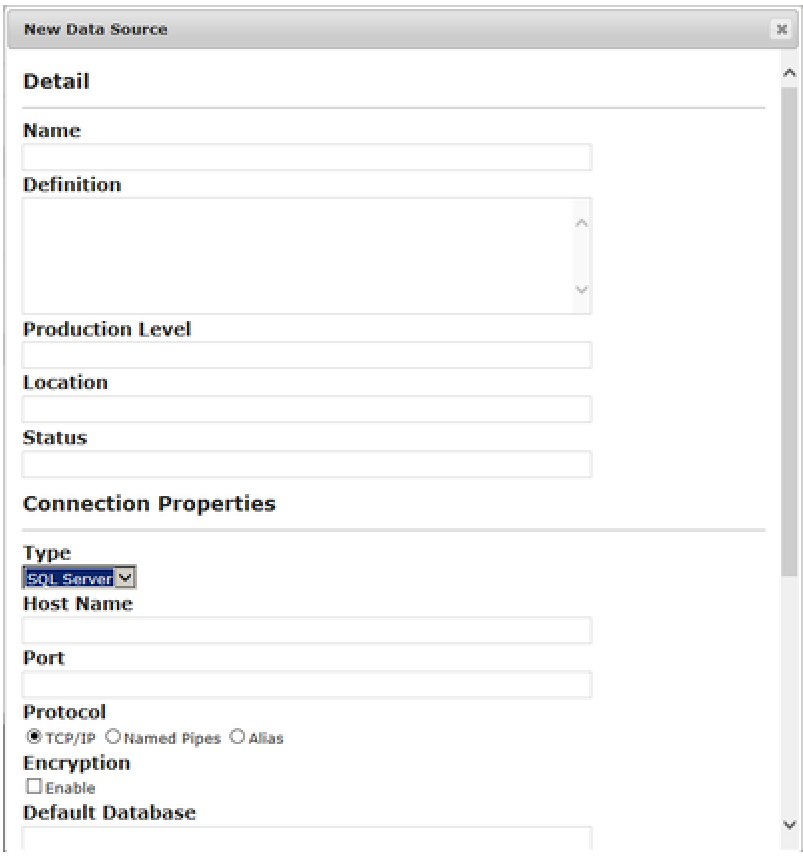
- Working with Data Sources
- Working with Groups
- Search Pages

New Data Source

Data Sources | click **New Data Source**

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

After you finish filling the information about the new data source, you can click **Save** to create your new data source.



You can click **Cancel** at any moment to abort.

See Also

- Creating a Data Source

User Menu

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

The user menu contains two items:

- **My Settings**. Hover this item to show a context menu with additional menu items.
- **Log Out**. Logs you out of Team Server, ending your current user session.

My Settings Context Menu Items

Item	Description
Help	Displays the online help.
Preferences	Lets you define your email address, as well as your search and filtering preferences.
Configurator	Lets you to change the settings that you decided when you first install and configure Team Server and Repository.
Admin	Gives you access to administrative functions. Manage licenses, permissions, publications, and more.
Activity	Displays graphics of login activity, connection activity, and ER object history. You can click the bars on the graphics to access detailed reports.
SystemSettings	Gives you access to social administrator configuration.
Notifications	Lets you configure your notification settings.

Non-Social Users

For Non-Social users, please see: User Menu.

See Also

- User Guide

Activity

My Settings > Activity (super users)

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

This page provides the following graphics:

- Denials
- Users
- API Usage
- Web Site Usage

Denials

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

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

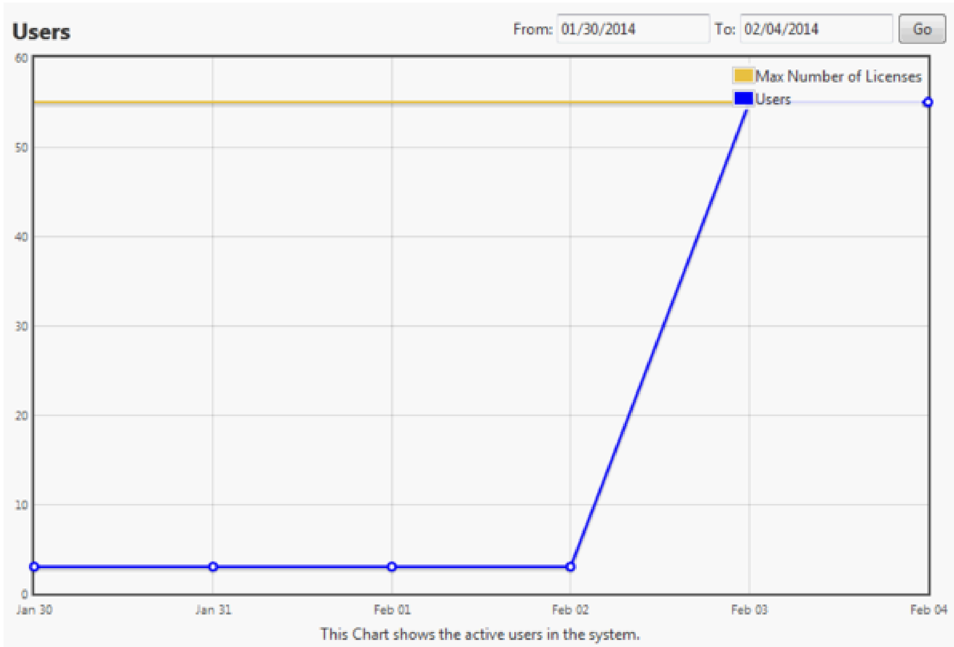
When you hover the pointer over a node representing activity for a specific day, Team Server displays information about the graph node.

Users

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

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

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



API Usage

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

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

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

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

Web Site Usage

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

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

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

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

See Also

- Tracking User Activity
- Overview of Connection Licenses

Working with Resources

Team Server gives you access to various types of resources:

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

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

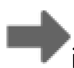
- Resource Pages

Adding an Attachment Attribute to a Resource Type

You can associate enterprise data dictionary attachments with the following 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 **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 resource 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 **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 **Team Server**.

See Also

- Creating a Glossary
- Creating a Term
- Creating a Data Source

Discussing Resources

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

You can access the discussions about a specific resource from the **Discussions** subpage of the target resource page.

Topics

- Starting a Discussion about a Resource

See Also

- Following Resources

Starting a Discussion about a Resource

To start a discussion about a resource:

1. Open the page of that resource.
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 resource:

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

Tip: For information about the fields that you can edit, check the documentation of the description page of the type of resource that you are editing.

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 **Manage** 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 the name that appears 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 the **Save** button below the steward list. If you want to discard changes, click **Cancel**.

Note: Only the users with the super user role, steward, and users with steward permission will be able to manage the stewards of it.

See Also

- Overview of Stewards
- Editing a Resource

Following Resources

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
- 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 **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.
2. Open the **Stream** subpage.
3. Write your comment into the field with the text "Write a comment...", and click ↵ to send your comment.

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.

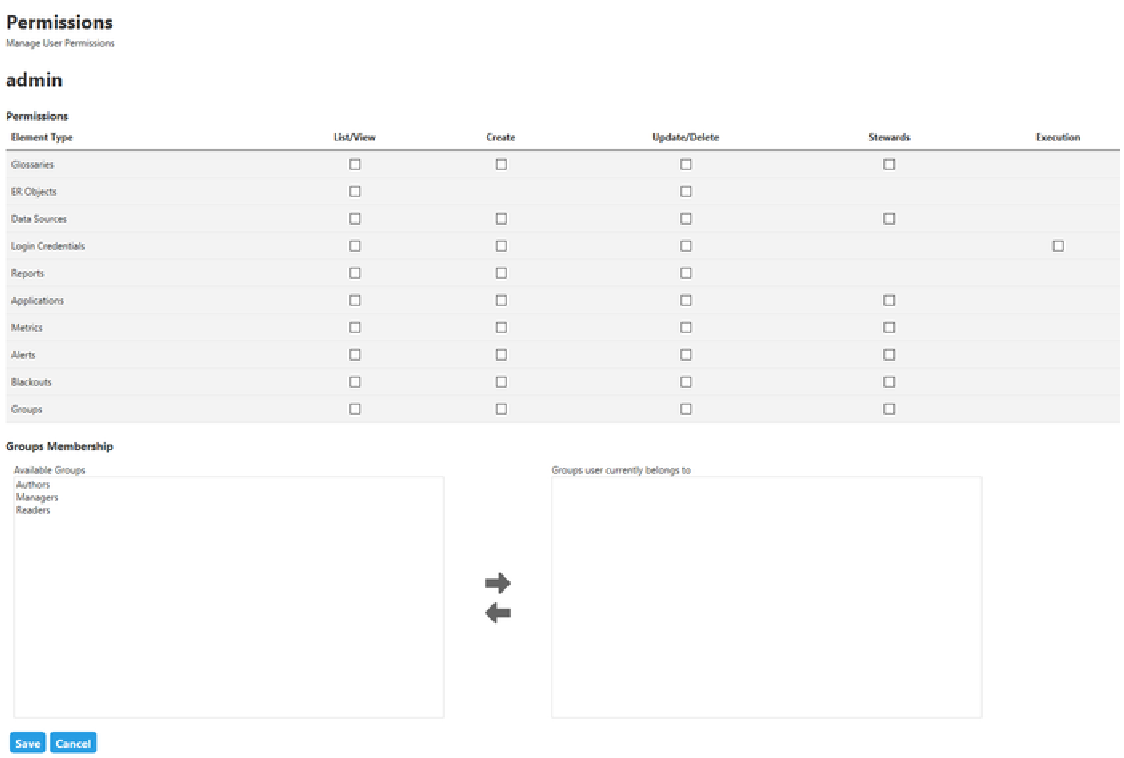
See Also

- Following a Resource

Manage User Permissions on a Resource

To manage User Permissions:

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



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

It shows the following options for each element type:

Item	Description
List/View	Check this option to allow read-only 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 the **Save** button to save your settings.

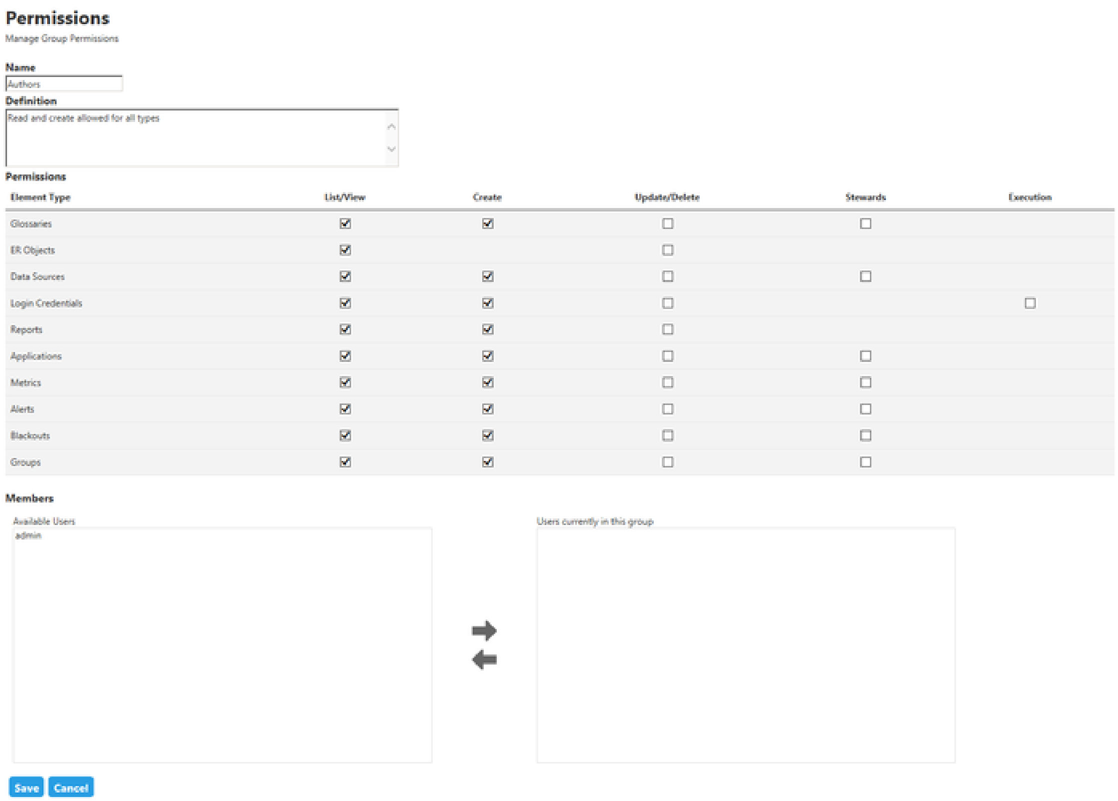
See Also

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

Manage Group Permissions on a Resource

To manage Groups Permissions:

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



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

It shows the following options for each element type:

Item	Description
List/View	Check this option to allow only read permissions.
Create	Check this option to allow creating the resources.
Update/Delete	Check this option to allow editing and deleting the resources.
Stewards	Check this option to allow user to manage the 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

Interacting with People

You can interact with social users (people) as you interact with any other **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

- Creating a New User
- Editing an User
- Searching for a User
- Following People
- Adding an Attachment Attribute to People
- Deleting an User

See Also

- People search page
- Person Pages

Loading Glossaries and Terms from a CSV File

You can load into **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**.

Team Server loads the glossaries and terms on the CSV file.

Note: If you have any formatting errors in your csv file, you may receive an error message. The log file that you can check for any import errors is located at: ..\Embarcadero Team Server 2016\logs\ersportal.log

See Also

- Creating a Glossary
- Creating a Term

CSV Format to Load Glossaries and Terms

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

Later in this topic there 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** allows you to modify the glossary 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 **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** allows you to modify the term 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 **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.
RelatedGlossaries	Name of any related glossaries. Separate values with a semicolon. For example: `Glossary1;Glossary2`.
RelatedTerms	Name of any related terms. Separate values with a semicolon. For example: `Term1;Term2`.
TermEntityType	Name of the Term Entity Type. This can be predefined by you when creating terms, or from the **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.

Note: Please note that linked terms cannot be updated.

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 **Team Server**.

Single Glossary

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

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

Terms

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

```
+++ Terms Begin +++
Key,Name,Status,Definition,Abbreviations,Aliases,AdditionalNotes,Stewards,Relat
edGlossaries,RelatedTerms,TermEntityType
,AMT,Approved,"Tax imposed to back up the regular income tax imposed on
CORPORATION and individuals to assure that taxpayers with economically measured
income exceeding certain thresholds pay at least some income
tax.",,,,admin,Accounting,,
,Abatement,Approved,"Complete removal of an amount due, (usually referring to a
tax ABATEMENT a penalty abatement or an INTEREST abatement within a governing
agency).",,,,admin,Accounting,AMT,
+++ Terms End +++
```

Note: When relating more than one term to another, term entity types must be specified with the format "RelatedTermName1,TermEntityType1";"RelatedTermName2,TermEntityType2".

Searching for a Resource of a Specific Resource Type

To search for resources of a specific resource type:

1. Select the search page of the target resource type.
2. Enter your search terms in the search field.

As soon as you stop typing, **Team Server** filters the list of resources and displays only resources that meet your search criteria. Click their name to open their resource page.

Advanced Search

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

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

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

Favorite Searches

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

To save an advanced search as favorite:

1. Perform an advanced search.
2. Click **Save Search As**.
3. On the **New Search** dialog box that opens:
   - Enter a descriptive **Name** for your search.
   - Optionally, write a **Description** that provides additional details that would not fit the search name.
   - Optionally, check the **Shared** checkbox to make your new favorite search public, so that any other user can access your search from the Favorite Searches page. If you leave this option unchecked, you will be the only

user able to access your new favorite search from the **Favorite Searches** page.

After you save your new Advanced Search as favorite, you can find it in the Favorite Searches page.

See Also

- Search Pages
- Global Search Box

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 Glossaries** the name of an existing glossary.

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

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

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

    3. Define the **Status** of the glossary using nomenclature you decide upon. You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", and "Deprecated".
    4. Write a **Definition** that provides detailed information about the glossary, such as its purpose and audience.
    5. Click **Save** to save your new glossary.

See Also

- 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 **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 **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 Team Server pages of the related Term, where you can browse your company Glossaries for other related Terms and ER Objects.

After your Glossary Tool Tips are enabled, browsing on any web page that has been configured to be included will cross reference any matching Terms in your 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 Team Server to use Glossary Tool Tip, however if your **Team Server** installation uses a secure HTTPS connection then the 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

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.

Enable Linked Terms Creation

To enable Linked Terms to be automatically created you need to modify a property value in the configuration file located at <installation dir>\tomcat\webapps\ROOT\WEB-INF\config.properties .

The property is **linkedtermsetl.enabled=false**. Change the value to true to enable the creation of Linked Terms. It is necessary to restart Tomcat after changing the property.

Enable Linked Terms Creation on Repositorty Standalone Upgrade Scenario

To enable Linked Terms when upgrading from an environment having only Repository installed, an extra step needs to be performed.

First enable the Linked Term creation with the procedure above and then execute the following query against the database before performing the data migration.

```
Update SYNC_PROPERTY set VALUE = (select min(Object_History_ID) from
Object_History) where NAME= 'Object_History_LastId';
```

See Also

- Creating a Term
- Related Terms subpage

Matching a Term with ER Objects

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**.

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 ER Objects

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

Topics

- Browsing ER Objects
- Searching for an ER Object
- 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

See Also

- 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.

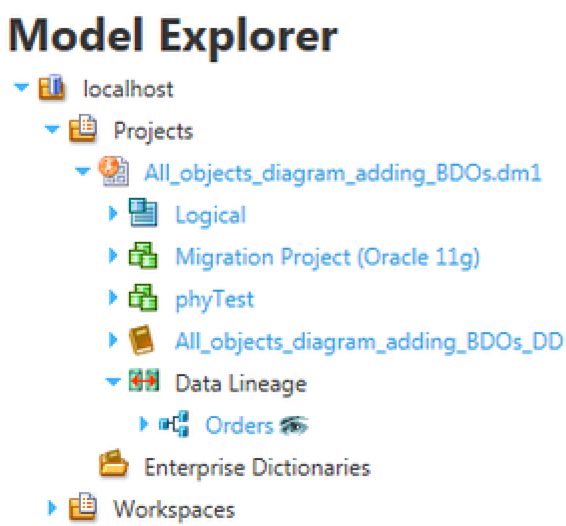
See Also

- Linked Terms
- Associating a Term with an ER Object
- Related Terms subpage

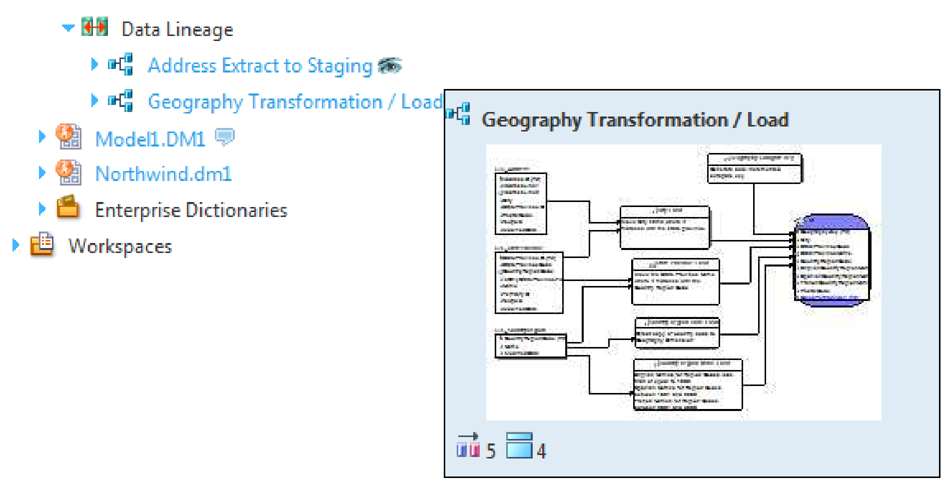
Browsing ER Objects

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 contains links that you can use to continue browsing your ER objects.



As you hover over certain ER objects, such as diagrams, 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.



Configuring Sensitive Data Alerts

Header of an ER object that matches two alert conditions.

You can configure security properties and attachments so that **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** subpage 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

- Condition Alerts
- Object Alerts Tab

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 **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. **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
- Condition Alerts

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

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.

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 **Team Server** saves your changes.

Alternatively, if you are a super user, you can edit any existing alert condition from the **Object Alerts Tab** of your **Admin** menu.

See Also

- Adding a Sensitive Data Alert Condition
- Deleting a Sensitive Data Alert Condition
- Object Alerts Tab

Matching an ER Object with Terms

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**.

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

Online Help for Team Server 2016

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ER/Studio Team Server Core
Enterprise model and metadata collaboration for context, consistency, and compliance

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 an ER Model with a Data Source
- 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

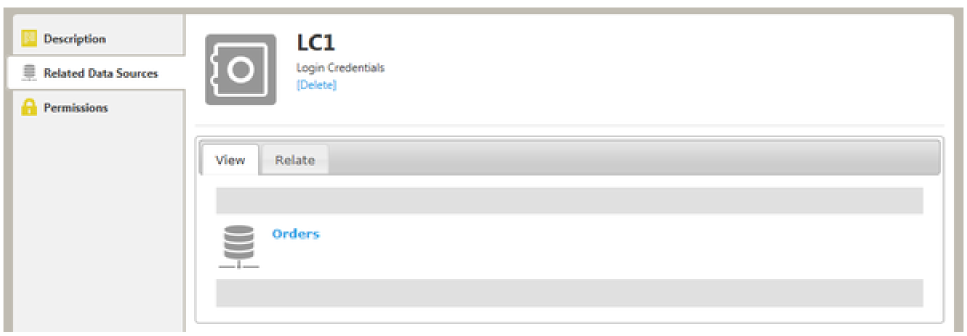
The **Related Data Sources** subpage of Login Credentials lists the Data Sources that are either related to the current Login Credential, or that can be related to the Login Credential.

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.

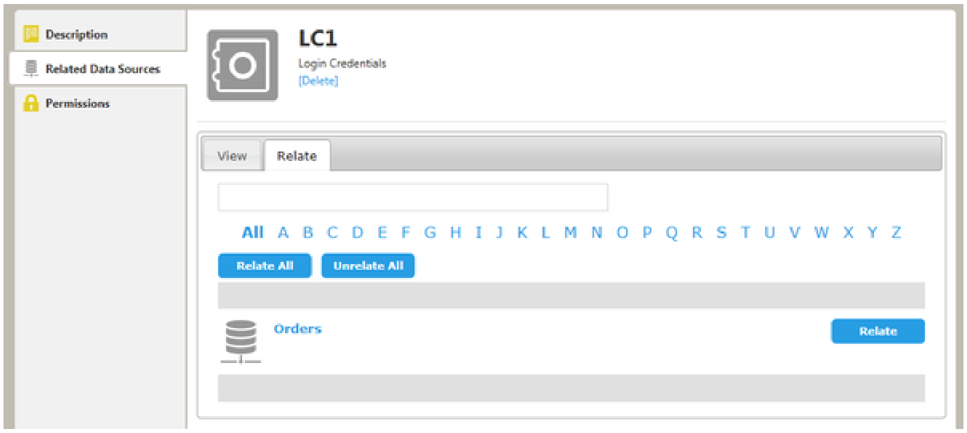


Relate Tab

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 Team Server must be unique.
    2. Write a **Definition** that provides detailed information about the data source, such as its purpose and audience. You can also optionally enter a **Production Level**, **Location**, and **Status** as per your convenience.
    3. Select from the **Type** combo box the database management system (DBMS) that stores the database.
    4. 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.
    5. 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.
    6. Under **Login Credentials**, you can define the login credential to connect the data source. If you prefer, you can do this step later.
        1. Select one option:
            - **User/Password**: Define **User Name** and **Password** for the login credential. You can edit it later to modify or include more information.
            - **OS Authentication**: Enter **Trusted Host** and **Role**.
            - **Use existent Login Credenditals**. Allow you to choose one that already exists.
            - **No login information**. Allows you to create or relate the login credential later.
    7. Click **Save** to save your new data source.

Note: Adding data sources in **Team Server** makes them available into **ER/Studio Data Architect** for the purposes of connecting or mapping.

See Also

- Deleting a Resource
- New Data Source dialog box

Data Source Fields for a Specific Database Management System

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

You can access these fields when you create a data source or when you access the description page of an existing data source.

DB2 LUW

Item	Description
Use DB2 client aliases	Check **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: o **TCP/IP** (default). Standard network protocol. o **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 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 to common users.

To see the details of a Login Credentials, browse to it and open the corresponding Login Credential page.

Topics

- Creating Login Credentials
- Editing Login Credentials
- Deleting Login Credentials
- Browsing Login Credentials
- Associating a Login Credential with a Data Source
- Auditing the Usage of Login Credentials by other Product

See Also

- Login Credential Pages
- Login Credentials Search Page
- Data Sources

Creating Login Credentials

You can create a Data Source Login Credential at the same moment you are creating the data source or you can do it later.

To create a Login Credentials:

1. Select the Data Sources search page and then select **Related Login Credentials** on the left-hand sidebar.
2. Click the **New Login Credentials** button on the upper-right corner.
3. On the **New Login Credentials** dialog box that opens:
    1. Define the **Name** of your new Login Credential.
    2. Choose the type of authentication you prefer:
        - Type the **User Name**. User Name is a login name for a Data Source. Then enter and confirm the **Password**. The password that allows access to the Data Source. For platforms that may not require a password such as Sybase, this field may be left empty.
        - Select **OS Authentication**. This option disables **Name**, **Password** and **Confirm Password** fields since the information will be read from the current OS login. The **Trusted Host** field appears.

Note: Include the name of the host in **Trusted Host** in case your server requires it. If you do not include it when necesary, **Team Server** will show the exception that your database server provides.

3. Define a **Role** for the Login Credential.
4. Write a **Definition** that provides detailed information about the Login Credential, such as its purpose and users group.
5. Click **Save** to save your new Login Credential.

See Also

- Associating a Login Credential with a Data Source
- Deleting Login Credential
- Login Credentials Search page

Editing a Resource

To edit a resource:

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

Tip: For information about the fields that you can edit, check the documentation of the description page of the type of resource that you are editing.

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 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 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, **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

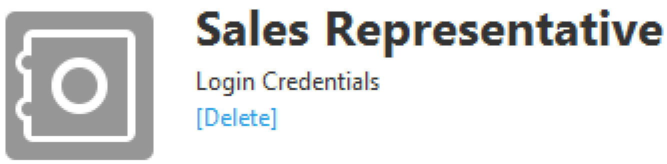
Login Credential Pages

Login Credential pages provide information about the Description and the 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, as well as 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.
Permissions	Opens the users and groups permissions tab for the login credential.

See Also

- Working with Login Credentials

Working with Groups

Groups are designed as a shortcut to get in touch with other elements. It also allows you to have related elements concentrated in one place.

When you create a group, you become its owner. To see the details of an existing group, find it and open its group page. You can then includedata sources.

Topics

- Creating a Group
- Searching for a Group
- Editing a Group
- Including a Member into a Group
- Discussing Groups
- Following Groups
- Editing the Stewards of a Group
- Deleting a Group
- Manage Permissions for a Group

See Also

- Group Pages
- Working with Resources

Creating a Group

To create a group:

1. Select Data Sources.
2. Click the **New Group** button on the upper-right corner.
3. In the New Group dialog box that opens:
    1. Enter a **Name** to identify your new group.
    2. Optionally, if you want your new group to be a child of an existing group:
        1. Write in **Parent Group** the name of an existing group.

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

2. Click the group name to set the parent.

Note: Click the ✖ icon to the right-hand side of the parent name to unset the parent group.

3. Define the **Status** of the group using nomenclature you decide upon. You can use for example the following nomenclature: "Approved", "Not Yet Approved", "Implemented", "Not Yet Implemented", and "Deprecated".
4. Write a **Definition** that provides detailed information about the group, such as its purpose and audience.
5. Click **Save** to save your new group.

See Also

- Deleting a Group
- New Group Dialog Box

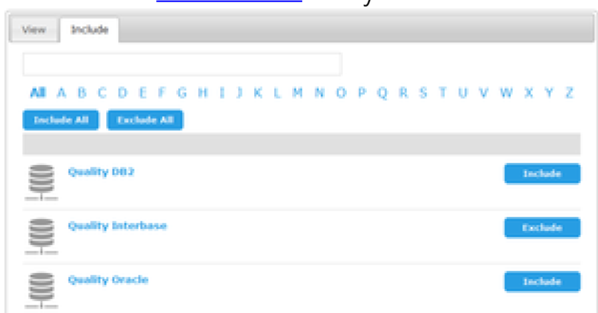
Members

The **Members** subpage of group pages lists the data sources included into the group.

If you are a steward of the group, you can also use this page to include or exclude data sources to the group.

The page is divided in two tabs:

- The View tab displays a list with the data sources included into the group.
- The Include tab lets you include and exclude data sources.



Include Tab

The content of the **Include** tab is similar to the content of the Data Sources page. For example, it has a search box, and letters to navigate the matching data sources.

On the right-hand side of the data sources entries, you can click **Include** to include a data source into a group, or you can click **Exclude** to exclude the target data source from the current group.

On the top of the list of data sources, you can click **Include All** to include all the listed data sources to the current group, or you can click **Exclude All** to exclude all the listed data sources from the current group.

See Also

- Working with Data Sources
- Working with Groups

Troubleshooting

Here you can find a list of some frequently encountered problems and their solutions or workarounds.

Most problems can be fixed by making sure that your system is running the latest software. Before you start troubleshooting, it is advised that you make sure your product is up to date.

Cannot Connect to Team Server

Unable to Connect

If your web browser cannot establish a connection to the **Team Server** server:

- Check that the URL you are trying to access is Team Server's.
- Check that your system has a working connection to the Team Server server.
- Check that Team Server is running. See Starting Team Server.
- Try increasing the maximum memory assigned to Team Server. See Changing the Memory Limit of Team Server.

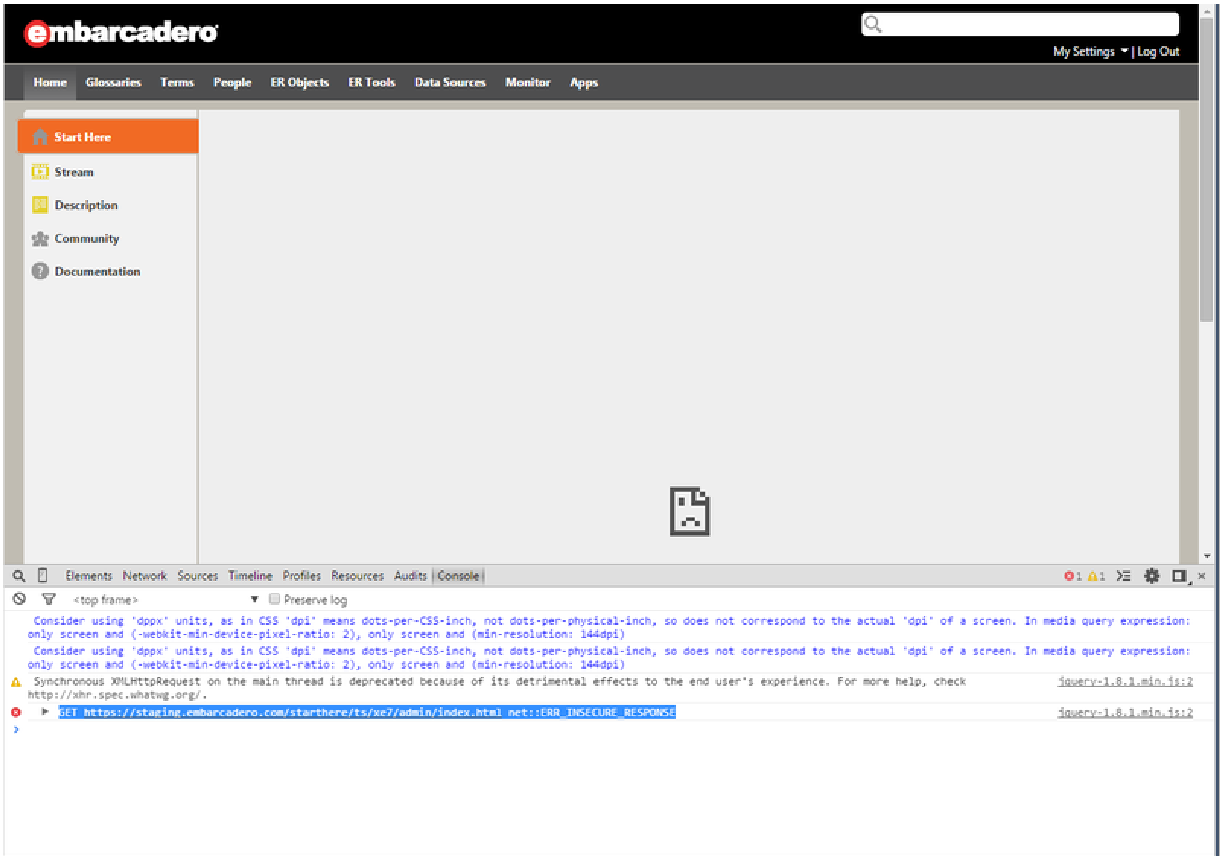
Template Could Not be Loaded

"Template could not be loaded..."

If you get this error message, you might need to restart the Team Server server. Contact your super user.

Team Server is not showing the Start Here page

Start Here page may be not shown the first time you access the home page using https connection. To solve this and obtain the certificate open http://www.embarcadero.com on the same browser and then refresh the **Team Server** home page.



Loading Pages Takes Too Much Time

Try increasing the maximum memory assigned to **Team Server**. See Changing the Memory Limit of Team Server.

Log Error Messages

There are some log files in the **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 Team Server. See Changing the Memory Limit of 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 Team Server than is available on the virtual machine.

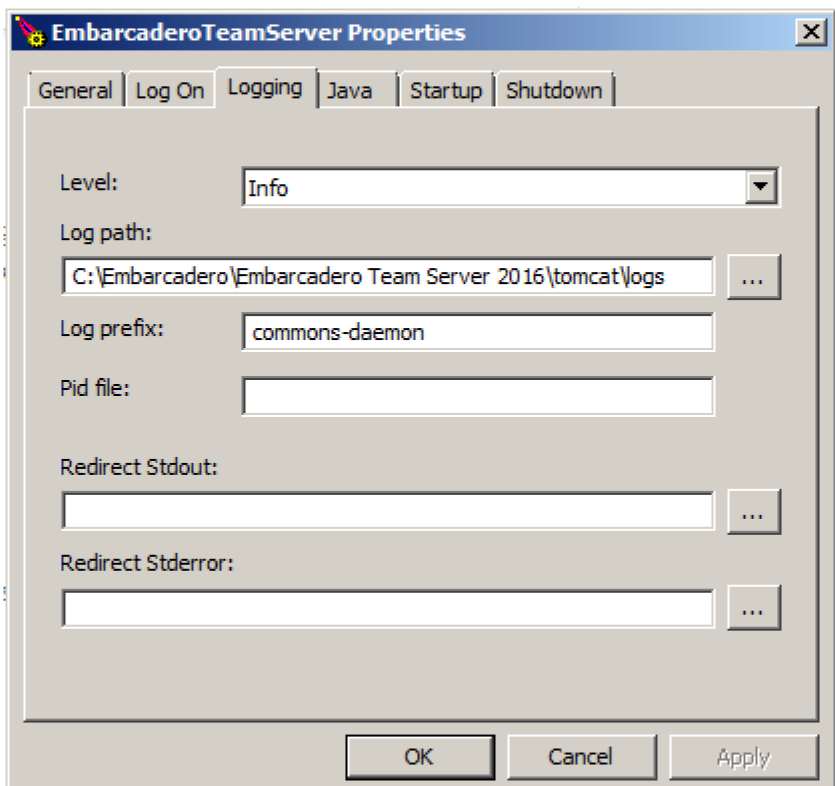
You need to decrease the maximum memory assigned to Team Server. See Changing the Memory Limit of Team Server.

tomcat\logs\embarcaderoteamserver-stdout.log & tomcat\logs\embarcaderoteamserver-stderr.log

The creation of these logs is turned off by default. You may want to enable it for debugging purpose.

From Windows: Start > All Programs > Team Server 2016 > Configure Tomcat Service.

On the **Logging tab** set **Redirect Stdout** and **Redirect Stderror** values to "auto" (without quotes) and restart the service.



Synchronization Issues

Synchronization fails if Tomcat Service Runs by Domain Administrator (16.0.0)

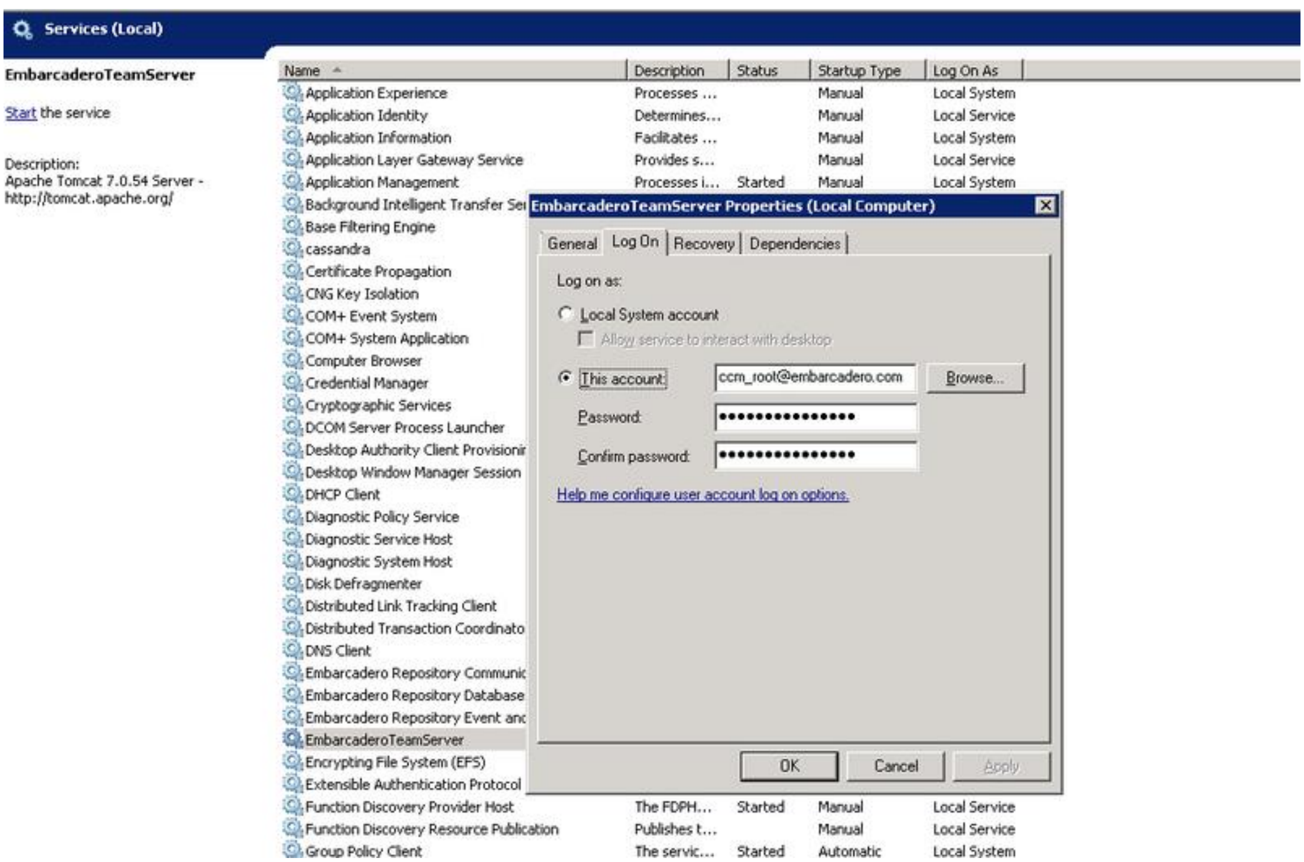
See ERStudioLauncher.log:

```
An error was detected after process was created. ERROR CODE: 1314, ERROR MSG: A
required privilege is not held by the client.
```

If the Synch process is not working because of this error, please follow next steps:

1. Go to the Windows Services Panel and right-click on *EmbacaderoTeamServer* service, then click on **Properties**.
2. Go to **Log On** tab and check **This Account**. Introduce the domain account you want to use.

Note: The account needs to have "Log in as Service" privileges in the Local Security Policy. This is actually assigned automatically if you enter in the credentials in the Windows Services Panel.

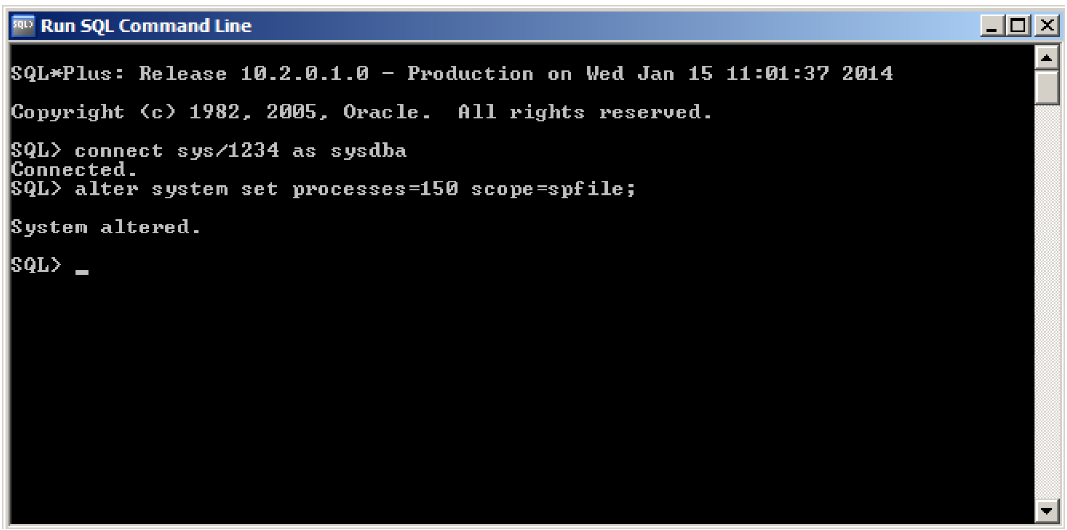


3. Now you have to modify the RepoDiagrams.bat file under <installdir>\portalIntf directory, so that it always runs PortalIntf.exe directly instead of using ERStudioLauncher. The contents of the batch file could be like:

```
@echo off
set SELECTED_DIAGRAM=%1
Start /wait /min "erstudio" portalintf.exe -m "ProcessDiagramObjects.bas"
```

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 have 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 not 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:

```
SELECT COUNT(*) FROM v$process;
SELECT COUNT(*) FROM v$session;
```

For Oracle 11g, the default maximum number of processes is 150 (149 available).

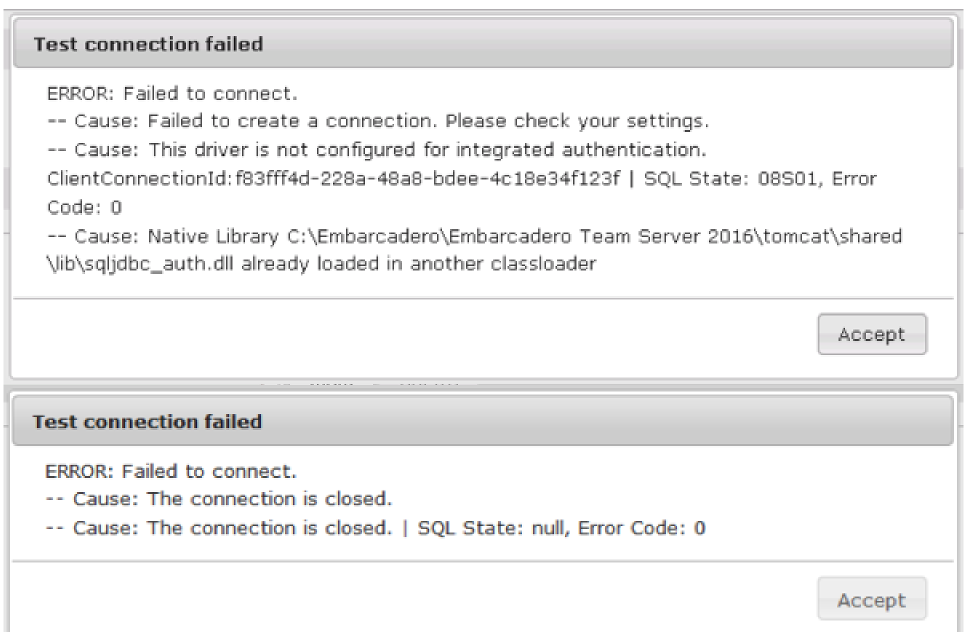
Once you have confirmed that you have definitely reached the maximum number of processes, you can use this query to see what they all are and if they are active:

```
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;
```

Test Data Source Connection Issues

Microsoft SQL Server

If you are trying to connect to one Microsoft SQL Server data sources with ssl enabled with version 2008 or less, you will get these errors.



Migration issue with HTTPS enabled

There is a known issue regarding the migration process with HTTPS enabled. If you have HTTPS enabled, the migration process will fail. In order to solve this issue, perform the following steps:

1. Configure https using the configurator.
2. End the configuration process without running the migration.
3. Log into Team Server and access the configurator page through My Settings menu and then perform the migration process.

See Also

- Overview of the 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 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 Team Server. See Solution Browser, Business Reports.

C

Connection Types

These are the type of connections that people can use to connect to Team Server. Not to be confused with user types. See Overview of User Connections.

CRUD

Create, Read, Update, Delete usage relationships.

D

Diagram

A graphical presentation of a collection of model elements.

Digital Certificate

A digital certificate (also known as a public key certificate or identity certificate) is an electronic document that uses a digital signature to bind a public key with identity information. The certificate can be used to verify that a public key belongs to an individual. You can view installed certificates in Firefox > Options > Advanced Menu.

E

ETL

Extraction, Transformation and Load, a process in data warehousing that involves extracting data from other sources, transforming it to fit business need, and then loading it into an end target, such as the data warehouse.

L

Logical Model

A logical entity-relationship model conforms to relational theory and contain only fully-normalized entities. For a logical data model to be normalized, it must include the full population of attributes to be implemented and those attributes must be defined in terms of their domains or logical data types.

A logical data model requires a complete schema of identifiers or candidate keys for unique identification of each occurrence in every entity. The logical model indicates the current identify selection because there are choices of identifiers for many entities.

P

Pentaho BI Platform

Architecture and infrastructure to build solutions to business intelligence (BI) problems. 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

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 Team Server stores and maintains data. For 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 Team Server. See Solution Browser, Technical Reports.

See Also

- What Is Team Server
- Overview of the Team Server Architecture