ER/Studio® Enterprise Portal 1.0.2 Evaluation Guide

Published: December 1, 2008

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Introduction to ER/Studio Enterprise Portal 1.0.2

ER/Studio Enterprise Portal is a web-based reporting tool used to access and search the ER/Studio repository for enterprise metadata for improved data and metadata management practices. The Enterprise Portal is accessed by a browser internally via the corporate intranet or externally via the internet browser for cross-model and repository-wide searching of data definitions and objects. It includes standardized HTML reporting capabilities and structured browsing in the repository to enable sophisticated reporting of the repository metadata.

The Enterprise Portal enables Data Management Executives, Data Modelers, Data Stewards and Business Users the capability to use, share, and better manage centralized metadata and improve data governance and standards. In addition, application development teams can use the Enterprise Portal to see what types of data already exist in the company. This eliminates replicating new data or deviating from the standard format data types needed to be implemented in existing applications.

The Enterprise Portal enables you to communicate all the information you need and lets you view the data model diagrams. You always know where to get the up-to-date information you need.

Product Benefits:

- With the Enterprise Portal you can do repository-wide browsing and reporting of the metadata.
- Developers, Database Administrators, Business Analysts, and Data Analysts can use the customized reporting interface to mine the repository to quickly produce usable and meaningful reports.
- The portal has simple and advanced searching capabilities of the repository to determine the location of objects, as well as their reuse and impact analysis.
- A browsing interface allows you to easily navigate to the models and dictionaries in the repository.

Session 1: Getting Started with the Enterprise Portal

Download and Start Enterprise Portal

The exercises used in the Evaluation Guide are based on the repository from a hosted trial. Please refer to Step 3.b below on how to access this repository. If you want to try the Enterprise Portal in your own environment, you will have to request a download link from Sales@embarcadero.com. You can also contact support@embarcadero.com for more information.

Take the following steps to access the Enterprise Portal:

1. Go to http://www.embarcadero.com/downloads/downloaderstudioent.jsp.
2. Complete the registration page.
3. You have two options after completing the page,
   a. Request the portal download
      i. This sends an email with your contact information to Sales@embarcadero.com.
      ii. Your sales representative will contact you and send the relevant information (URL and password to the hidden page).
   b. Request the URL and Login information for the hosted trial
      i. You are sent an email with the URL, user name, and password to the portal. It also includes various logins to look at different aspects of the portal.
      ii. Enter the URL in the Browser to display the Enterprise Portal login page.
      iii. Enter the User and Password.

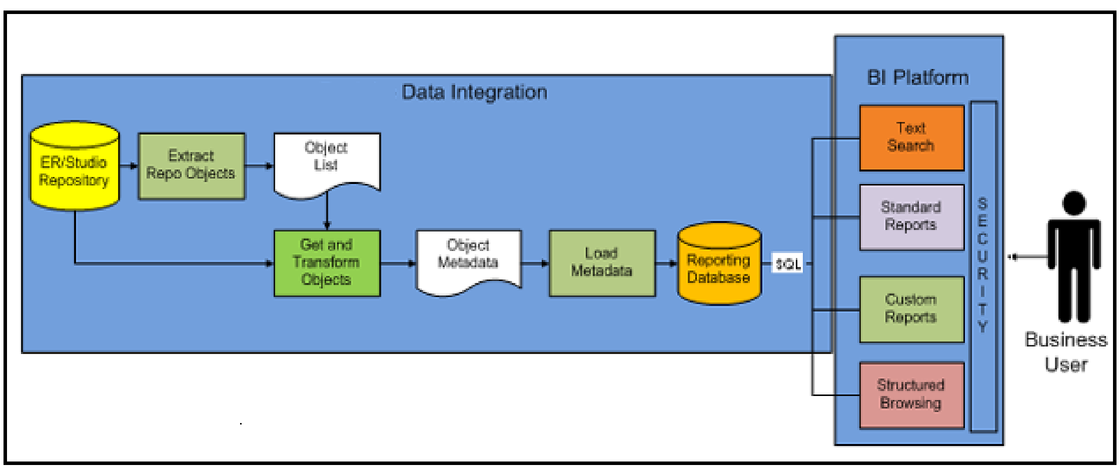
Overview

The ER/Studio Enterprise Portal enables you to search for all kinds of data in your ER/Studio Repository database, create reports, and then read the generated reports in an easy-to-read format.

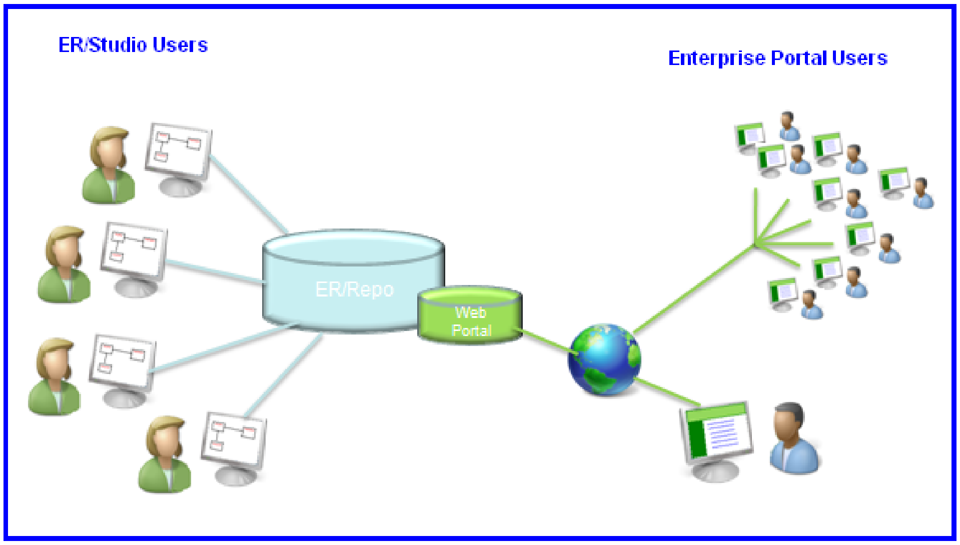
In addition, application development teams can use the portal to see what types of data already exist in the company. This eliminates replicating new data or deviating from the standard format data types needed to be implemented in existing applications.

The Enterprise Portal enables you to communicate all the information you need and lets you view the data model diagram as well. You will always know where to get the up-to-date information you need.

The progression of data integration and the different ways to access ER/Studio Repository data is illustrated below.



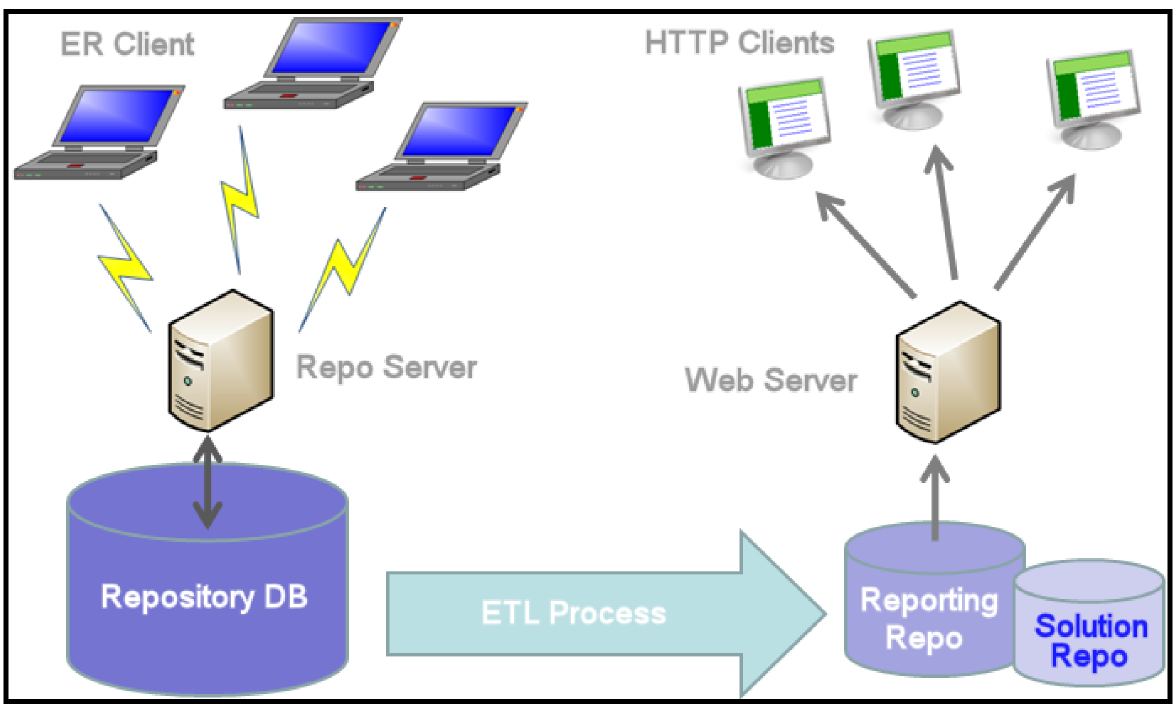
The following graphic shows a simplified example of the creation, storage, and user access to the ER/Studio Repository.



Understanding the Enterprise Portal Infrastructure

The Enterprise Portal is an add-on for the ER/Studio Enterprise edition which allows easy distribution of the repository metadata to the enterprise. The following lists the process of creating and accessing the metadata:

- The metadata is created and maintained by ER/Studio Clients.
- That metadata is stored in the ER/Studio Repository database.
- Through an extract, transform, and load process (ETL), that metadata is pulled into the reporting database which is synchronized on a scheduled basis with the source metadata.
- The Enterprise Portal users can then browse, search, and report on the synchronized metadata in the reporting database.



Before we begin, let’s cover some of the basic elements of the Enterprise Portal:

Custom Reports: This is a wizard which steps you through the creation of a business model report. You can select a business model type, apply a pre-set template, select the items you want included, set constraints, calculations, and sorting filters, and set the formatting.

Portal: The portal is the gateway to the reporting database. It uses HTML browsers through a Web server to deliver HTML pages.

Repository: The database created and maintained by the ER/Studio Enterprise application.

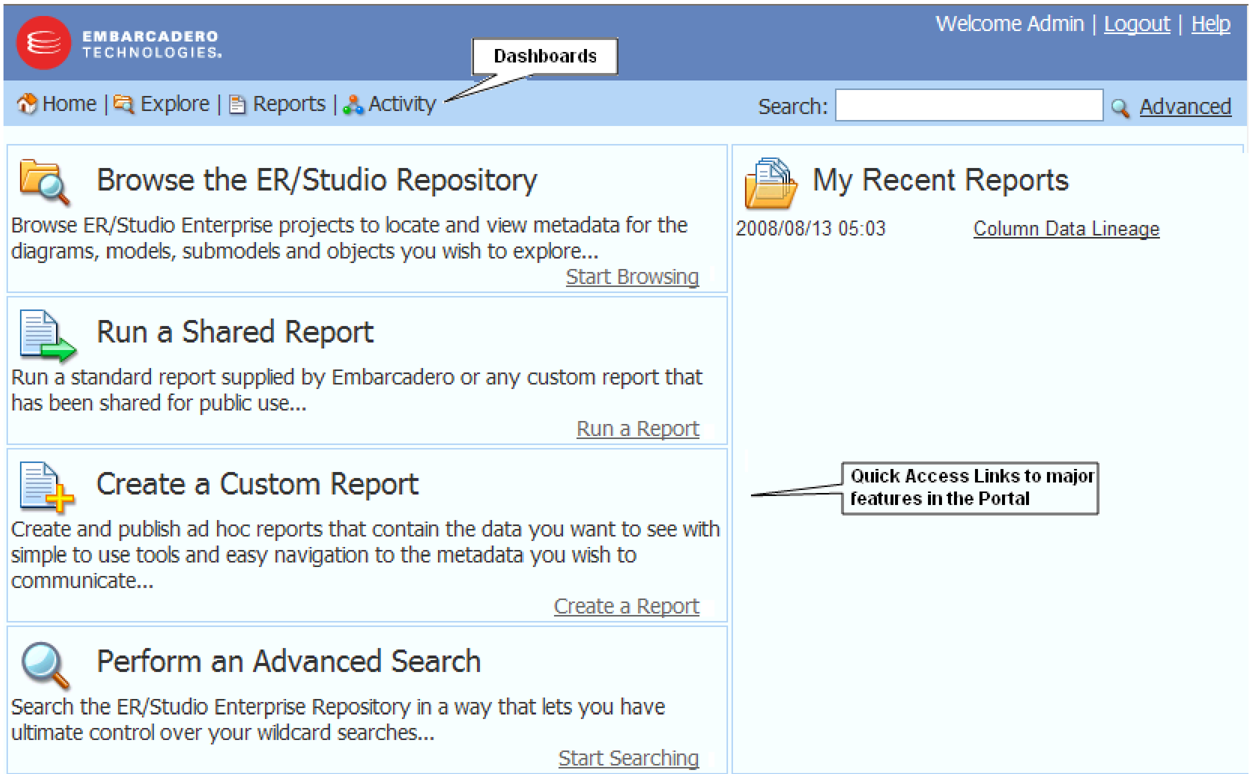
Reporting Repository: This is the repository that is extracted from the ER/Studio repository using the Extract, Transform, and Load process and made available to the Enterprise Portal user. This repository can be synchronized on a scheduled basis with the ER/Studio Repository.

Solution Repository: This Repository is the location where the reports from previous queries and the metadata they rely on is stored and maintained.

Standard Reports: You can choose the parameters for these reports by selecting the Project, Diagram, Model, Submodel, and Entity you want included. The format of these reports is pre-set and is installed with the Enterprise Portal. Business Reports include Attribute Definitions, Business Rules, and Entity Definitions. The Technical Reports include Column Data Lineage; Domain Bindings; Entity, Model, Submodel, Diagram; Entity Attachments, Reference Values; and Security Classifications. Reports can be added to the Standard Reports list using the custom reports wizard.

Session 2: Understanding the User Interface

The graphic below illustrates the main elements of the Enterprise Portal User Interface:



There are four dashboards available:

Dashboard	Description
Home	Interacts with the Enterprise Portal through the Home Page. You can navigate to the Business and Technical reports, and create custom reports.
Explore	Browse the contents of the repository. A list of projects and the diagrams contained within each project folder of the repository are available. From this list, browse the contents of any diagram by selecting the diagram you want to navigate. When a diagram is selected, a detailed report is displayed for that diagram.
Reports	Several standard reports are available that can be executed. Reports are grouped and organized into folders: Business Reports and Technical Reports.
Activity	See who is currently logged in to the Enterprise Portal, view objects that have recently been updated, and display a historical chart of connection activity.

Session 3: Tracking User Activity

The Enterprise Portal gives you the ability to quickly generate and view reports of various activities by you and other users. You can track login activity by date; what objects have been updated by object, date, and business model; and view the connection activity by date.

Login Activity

1. Click **Activity** to view the three information panels: Login Activity, Updated Objects, and Connection Activity.
2. The **Login Activity** information page displays the login activity by all users for a given time period. Enter the start and end dates of `08/01/2008` and `08/15/2008` and then click **Go**.
3. In the newly generated chart, click one of the bars to view all the logins for that date.

View as pdf View as xls

Login Activity Details

Activity Date: 08/08/2008

User Name	Login Time
Admin	15:03:56.427
Admin	15:12:09.763
Admin	15:26:57.617
Admin	21:46:02.677
Admin	22:53:04.157
Admin	22:53:34.433

4. You can view or save this report in PDF and XLS formats. You can also print the report by using the standard browser print function.
5. Return to the Activity dashboard by closing this Web page.

Updated Objects

The Updated Objects information panel displays a count of each object type in the reporting database updated in the time frame specified. You can adjust the time frame and the types of objects displayed.

Click on a particular object type in the graph, for example Attribute, and a report listing each object of that type modified during the time frame is displayed. From this list, you can drill down into the appropriate detail report for that object.

1. In the **Updated Objects** information panel, change the start date to `7/15/2008`.
2. All three business views, Model, Dictionary, and Data Lineage, are selected by default. Leave the default selections and click **Go**.
3. In the newly generated bar chart, click **Attachment** to view the results. This chart shows the Event Date, Parent Name, Name, User Name, and Operation.

View as pdf View as xls

Updated Object Details

Start Date: 07/01/2008
End Date: 08/13/2008
Object Type: Attachment

Event Date	Parent Name	Name	User Name	Operation
2008-07-22 23:12:05.0	Data Access	Client	Admin	Add_Object
2008-07-22 23:12:05.0	Data Access	Client Services	Admin	Add_Object
2008-07-22 23:12:05.0	Data Access	Internal IT - BI	Admin	Add_Object
2008-07-22 23:12:05.0	Data Access	Internal IT - DBA	Admin	Add_Object
2008-07-22 23:12:05.0	Data Access	Website Guest	Admin	Add_Object
2008-07-22 23:12:05.0	Entity/Table Properties	Business Unit	Admin	Add_Object
2008-07-22 23:12:05.0	Entity/Table Properties	Data Quality Steward	Admin	Add_Object
2008-07-22 23:12:05.0	Entity/Table Properties	Design Steward	Admin	Add_Object

4. From this report you can drill down to view the properties for the Object Name. Click the Object Name, **Client Services** to view this report.

View as pdf View as xls

Properties of Objects

Diagram Name: Global Investment Management
Object Type: Attachment
Object Name: Client Services

Property Type	Property Value
DEFINITION	Brokers who manage customer relationships are part of Client Services
NAME	Client Services
VALUE_TYPE	5

5. We are going to save this report as an Excel spreadsheet, so click **View as xls**.

6. Click **Open** in the File download dialog and the spreadsheet appears. You can also right-click in the report and select **Export to Microsoft Excel** from the context menu.

ViewAction [Read-Only] [Compatibility Mode]

Properties of Objects

Diagram Name:	Global Investment Management
Object Type:	Attachment
Object Name:	Client Services

Property Type	Property Value
DEFINITION	Brokers who manage customer relationships are part of Client Services
NAME	Client Services
VALUE_TYPE	5

7. The spreadsheet is created as a read-only file. Give the file a new name in the **Save As** dialog, save it, and then close the spreadsheet.

8. In the Enterprise Portal, return to the Activity dashboard by closing the report Web page.

Connection Activity

The Connection Activity information panel tracks all connection activity for the portal for a given time period.

1. For purposes of the exercise, change the start and end dates to `08/01/2008` and `08/18/2008` and then click **Go**.

2. In the newly generated chart, click the bar dated **08/12/2008** to view the detailed report. This report shows the user name, host, IP, Login Time, and Logout Time.

View as pdf View as xls

Connection Activity Details

Activity Date: 08/12/2008

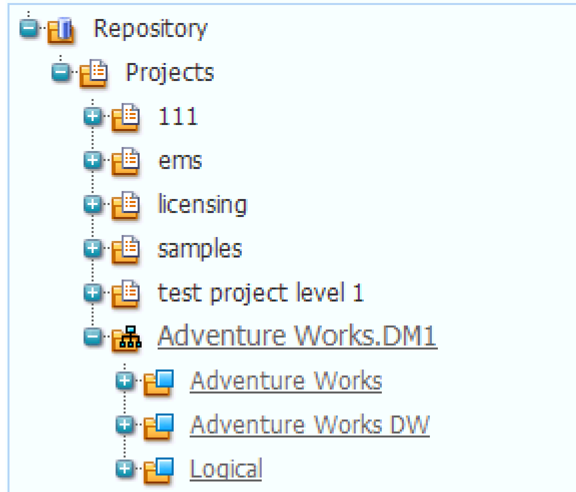
User Name	Host	IP	Login Time	Logout Time
Admin	towbborbely01.embarcadero.com	10.40.40.26	12/08/2008 00:13	12/08/2008 00:55
Admin	towbborbely01.embarcadero.com	10.40.40.26	12/08/2008 00:34	12/08/2008 00:36
Admin	towbborbely01.embarcadero.com	10.40.40.26	12/08/2008 07:20	12/08/2008 07:51
Admin	towbborbely01.embarcadero.com	10.40.40.26	12/08/2008 07:24	12/08/2008 07:55
Admin	towbborbely01.embarcadero.com	10.40.40.26	12/08/2008 08:39	12/08/2008 09:10
Admin	dewkbrow01.embarcadero.com	10.20.10.20	12/08/2008 09:03	
Admin	towbborbely01.embarcadero.com	10.40.40.26	12/08/2008 09:31	
Admin	rowaciocan01.embarcadero.com	10.100.40.31	12/08/2008 09:35	

3. Return to the Activity dashboard by closing the report Web pages.

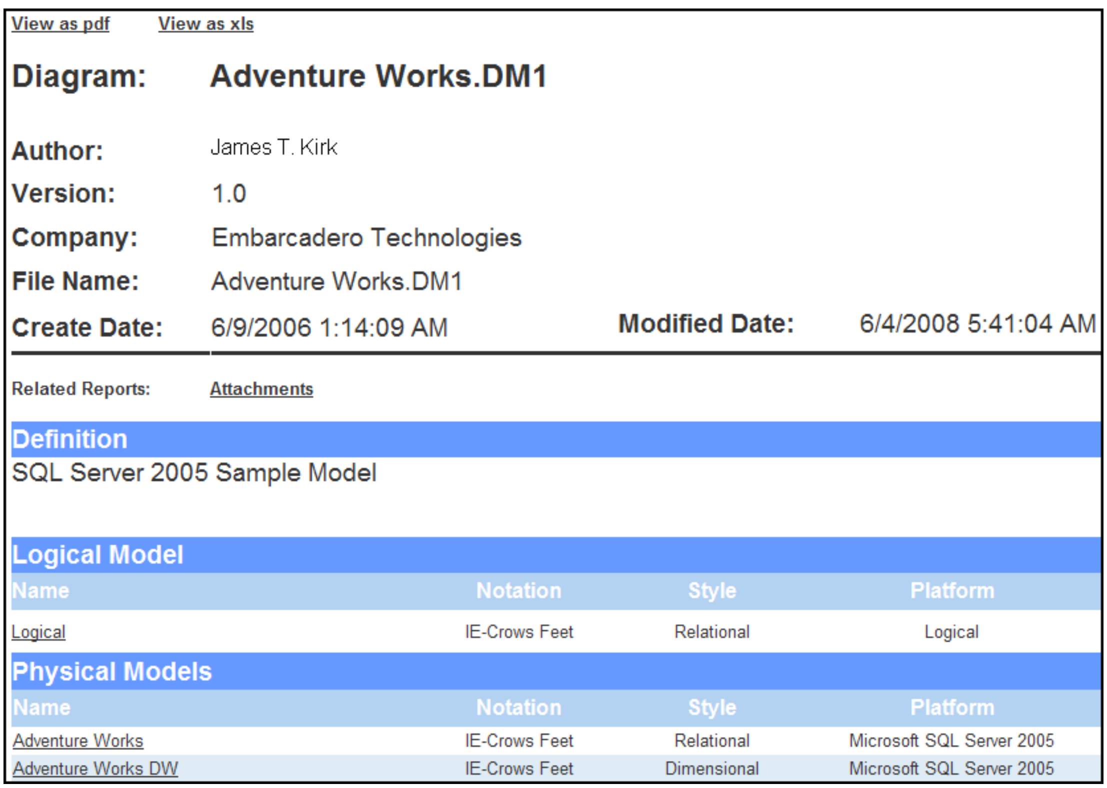
Session 4: Using the Structured Browsing Function

Structured Browsing allows you to navigate or "browse" the repository diagrams for detailed information on diagrams, models, and submodels.

From the diagrams you can either explore the models contained in the diagram or drill down into the diagram report. From that point, you can continue to browse the contents of the diagram by navigating the detailed report links.



1. On the dashboard click **Explore**. This Web page displays a hierarchy of all projects, diagrams, models, and submodels.
2. Expand the hierarchy and select **Adventure Works.dm1** to display the diagram report.
3. Click **View as report** located at the top of the report and the HTML report appears.



View as pdf   View as xls

Diagram: **Adventure Works.DM1**

Author: James T. Kirk
Version: 1.0
Company: Embarcadero Technologies
File Name: Adventure Works.DM1
Create Date: 6/9/2006 1:14:09 AM   **Modified Date:** 6/4/2008 5:41:04 AM

Related Reports: Attachments

Definition
SQL Server 2005 Sample Model

Logical Model

Name	Notation	Style	Platform
Logical	IE-Crows Feet	Relational	Logical

Physical Models

Name	Notation	Style	Platform
Adventure Works	IE-Crows Feet	Relational	Microsoft SQL Server 2005
Adventure Works DW	IE-Crows Feet	Dimensional	Microsoft SQL Server 2005

4. Close that Web page to return to the Explore dashboard.
5. Next, we can view a detailed report for one of the models associated with this diagram. Expand the hierarchy and then select the **Adventure Works** model.
6. Click **View as report** and the HTML report opens. All the associated submodels, entities, relationships, and views are listed.

Viewing Images

You can view the diagram images associated with the submodels in this report.

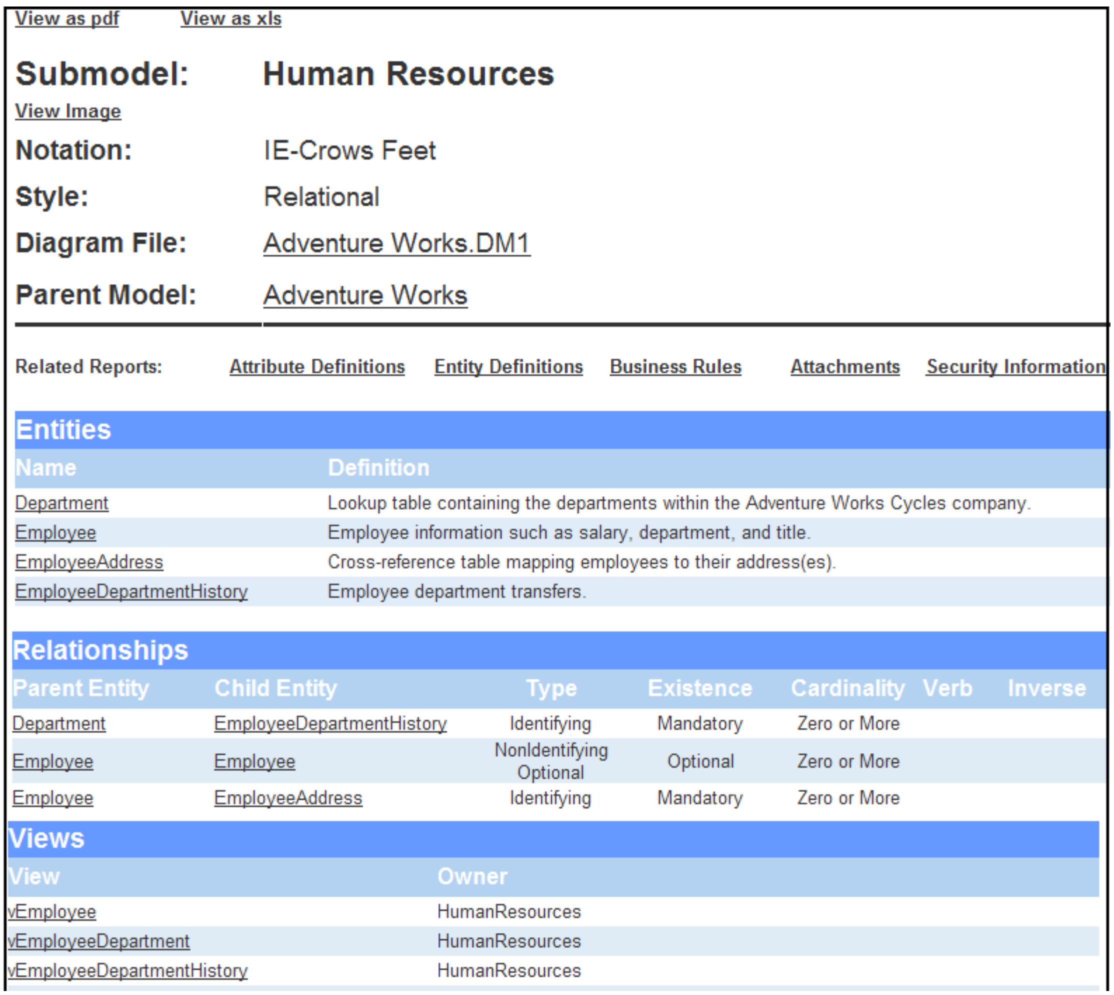
1. In the report that appears, click **View Image** for the submodel “Human Resources”.
2. The submodel diagram, which has been reduced to fit on one page, appears.
3. Zoom in to view the details on the diagram.

   The zoom behavior is browser-specific. For example, in Internet Explorer, you can use `Ctrl` + the mouse wheel to zoom to an arbitrary level of detail.

4. Close the diagram by clicking the back arrow in the browser.

Viewing the Submodel Report

1. From the opened Model report, click the submodel **Human Resources**. A detailed report appears displaying the entities, relationships, and views for the selected submodel.



View as pdf View as xls

Submodel: **Human Resources**

View Image

Notation: IE-Crows Feet

Style: Relational

Diagram File: Adventure Works.DM1

Parent Model: Adventure Works

Related Reports: Attribute Definitions Entity Definitions Business Rules Attachments Security Information

Entities

Name	Definition
Department	Lookup table containing the departments within the Adventure Works Cycles company.
Employee	Employee information such as salary, department, and title.
EmployeeAddress	Cross-reference table mapping employees to their address(es).
EmployeeDepartmentHistory	Employee department transfers.

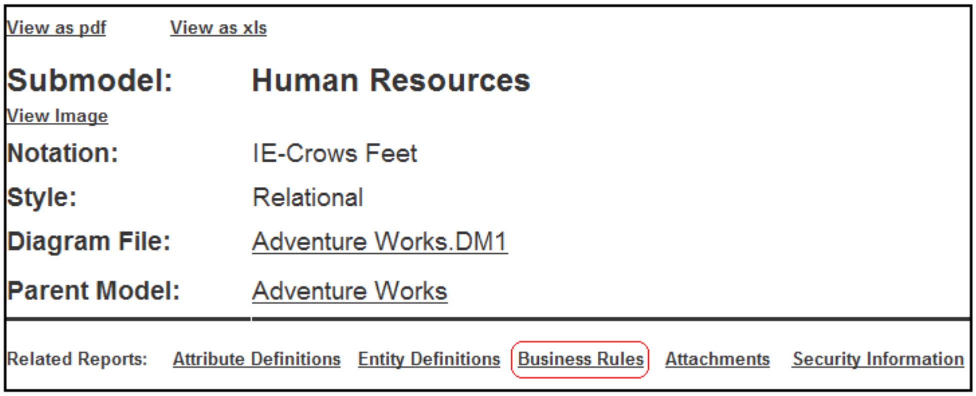
Relationships

Parent Entity	Child Entity	Type	Existence	Cardinality	Verb	Inverse
Department	EmployeeDepartmentHistory	Identifying	Mandatory	Zero or More		
Employee	Employee	NonIdentifying Optional	Optional	Zero or More		
Employee	EmployeeAddress	Identifying	Mandatory	Zero or More		

Views

View	Owner
vEmployee	HumanResources
vEmployeeDepartment	HumanResources
vEmployeeDepartmentHistory	HumanResources

2. We can also view related reports for the selected submodel. Click **Business Rules** in the report.



View as pdf View as xls

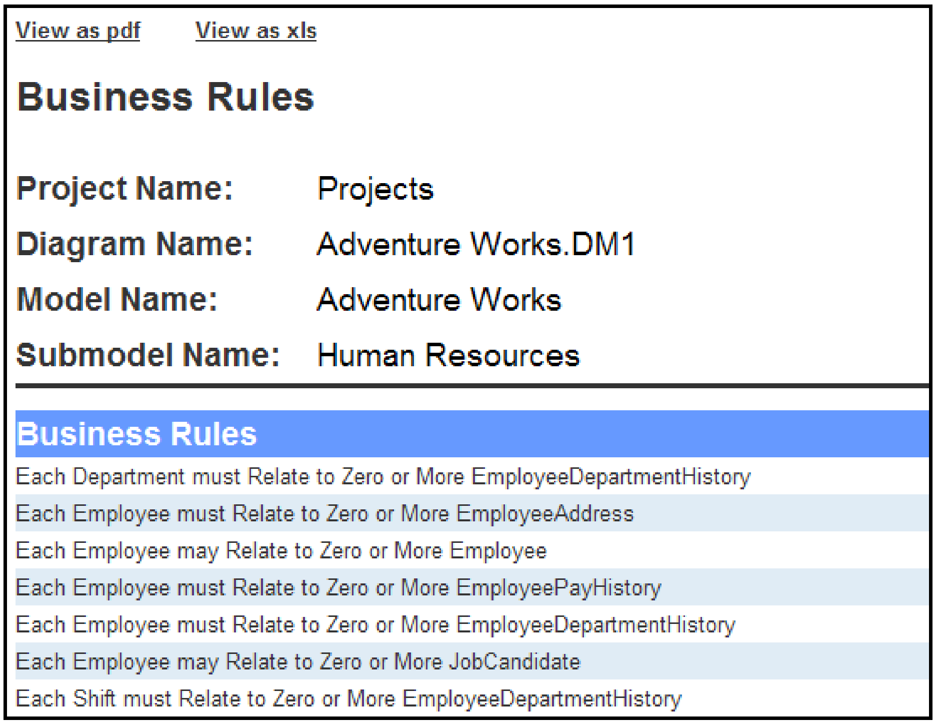
Submodel: **Human Resources**

View Image

Notation:	IE-Crows Feet
Style:	Relational
Diagram File:	Adventure Works.DM1
Parent Model:	Adventure Works

Related Reports: Attribute Definitions Entity Definitions Business Rules Attachments Security Information

A report showing all the business rules for this submodel is generated.



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Business Rules

Project Name:	Projects
Diagram Name:	Adventure Works.DM1
Model Name:	Adventure Works
Submodel Name:	Human Resources

Business Rules
Each Department must Relate to Zero or More EmployeeDepartmentHistory
Each Employee must Relate to Zero or More EmployeeAddress
Each Employee may Relate to Zero or More Employee
Each Employee must Relate to Zero or More EmployeePayHistory
Each Employee must Relate to Zero or More EmployeeDepartmentHistory
Each Employee may Relate to Zero or More JobCandidate
Each Shift must Relate to Zero or More EmployeeDepartmentHistory

3. Return to the Explore dashboard by closing the report Web page.

Session 5: Using the Search Function

Next we are going to do a simple search within the reporting database. The search results show the location of your entered text string in a search results table. You can then drill-down through the reports to view more details on the object.

1. On the Home dashboard enter `customer` in the **Search** area and then click **Enter**. The search will find all instances of your text string in the database. Note that the search string is not case sensitive. The following screen shot shows a partial listing of the results.

View as pdf   View as xls

Search Results

Result Matches: 483

Search Text: customer

Diagram File	Object Type	Object Name	Property Type	Property Value
activation-db.DM1	Entity	customer history property	ENTITY_NAME	customer history property
activation-db.DM1	Entity	customer history property	NAME	customer history property
activation-db.DM1	Entity	customer history property	TABLE_NAME	customer history property
activation-db.DM1	Entity	customer property	ENTITY_NAME	customer property
activation-db.DM1	Entity	machine customer	ENTITY_NAME	machine customer
Adventure Works.DM1	Entity	ContactCreditCard	DEFINITION	Cross-reference table mapping c table to their credit card informa
Adventure Works.DM1	Entity	ProductReview	DEFINITION	Customer reviews of products th
Adventure Works.DM1	Entity	SalesReason	DEFINITION	Lookup table of customer purch

2. You can continue to drill-down through the reports. For example, click **machine customer** under **Object Name** on the report shown above and the report for that entity appears.

View as pdf   View as xls

Entity: machine customer

Table Name: machine customer

Related Reports: Attribute Definitions   Attachments   Security Information

Definition

Notes

Attributes

Name	Definition	Data Type	Domain	Key Type	Allow Nulls
customer id		BIGINT	ID	Inherited Key	NOT NULL
machine id		BIGINT	ID	Inherited Key	NOT NULL

You can view and save these reports.

1. Click **View as xls** and a **File Download** dialog appears.
2. You can select either Open or Save. Click **Open** to immediately view the report in a Microsoft Excel spreadsheet. After viewing the spreadsheet, close the Excel application.
3. Return to the Explore dashboard by closing the report Web pages.

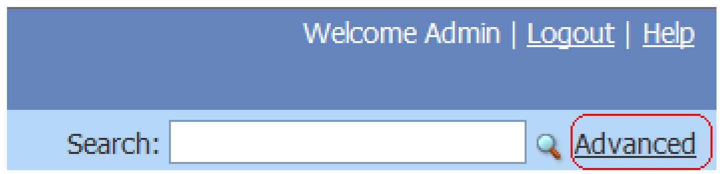
Session 6: Using the Advanced Search Function

In the advanced search, you have the following capabilities in addition to those of the Simple Search. You can:

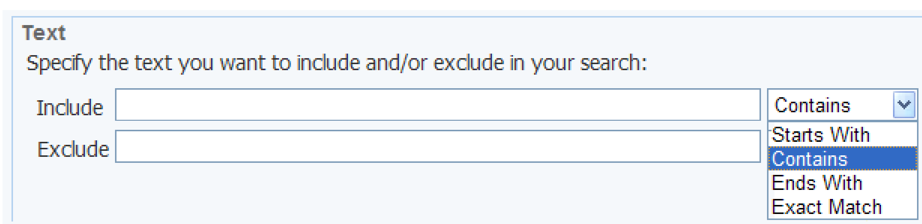
- Specify that the property value starts with, contains, ends with, or is an exact match to the text.
- Set the scope to either Projects or Diagrams. The list of files displayed depends on their role assignments as defined in the ER/Studio Repository.
- Set filters to include or exclude specific object types.
- Set how you want the search results sorted.
- Specify the format of the results as HTML (default), PDF, or XLS.

In the following example, we want to find all references to the text string “customer” in the diagram “Repository Reporting”.

1. On the dashboard page, click **Advanced** and the Advanced Search Web page appears.

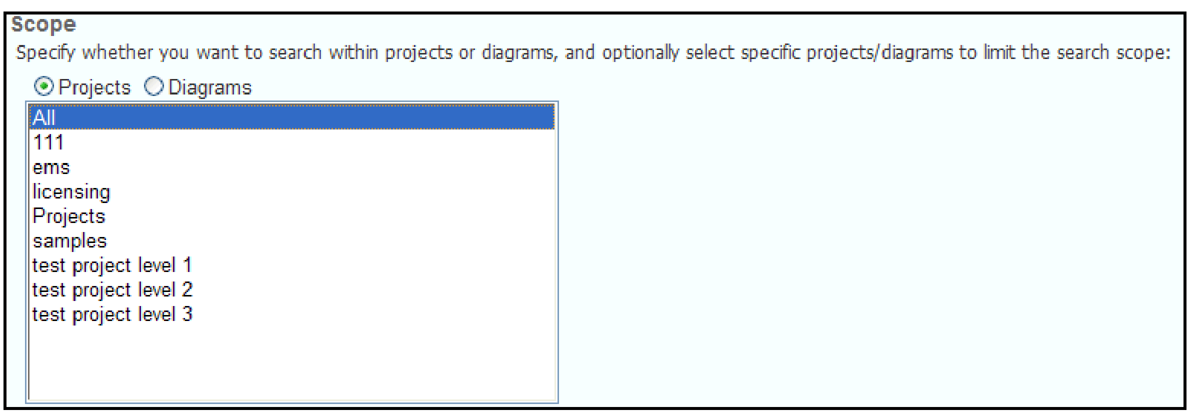


2. In the Text area, enter `customer`. From the selection list, choose the option **Contains** which is the default.

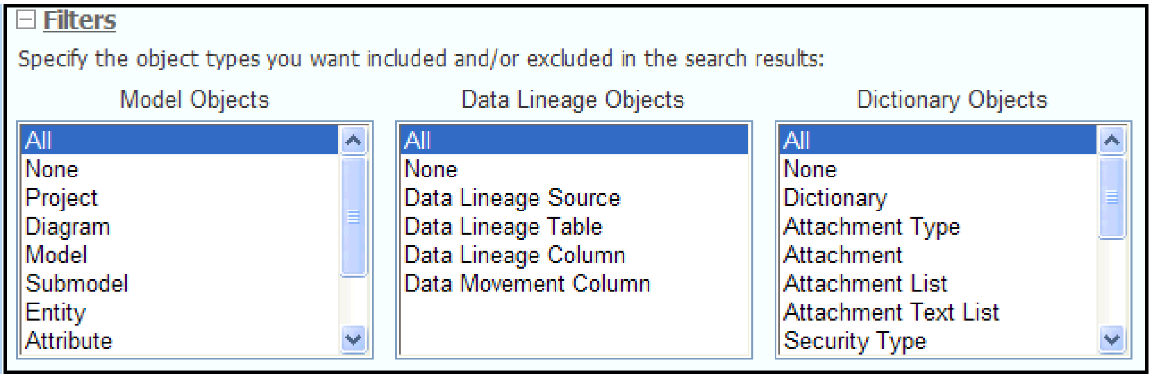


3. You can specify the scope of the search by selecting either the **Projects** or **Diagrams** option. All projects or diagrams in the repository are listed. For this exercise, leave the default setting **All**.

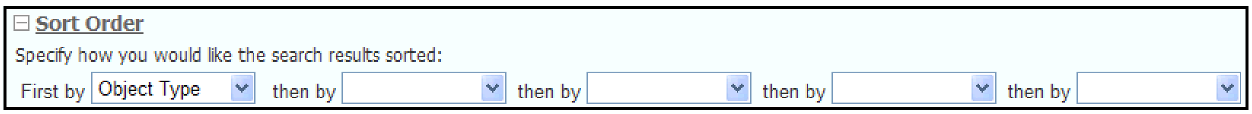
   Note: You can also select multiple individual items in the list by holding down the Ctrl key and clicking the items you want included.



4. In the **Filters** area, select the elements you want included from the **Model Objects**, **Data Lineage Objects**, and the **Dictionary Objects** lists. For this exercise leave the default settings as **All** for the three object types.

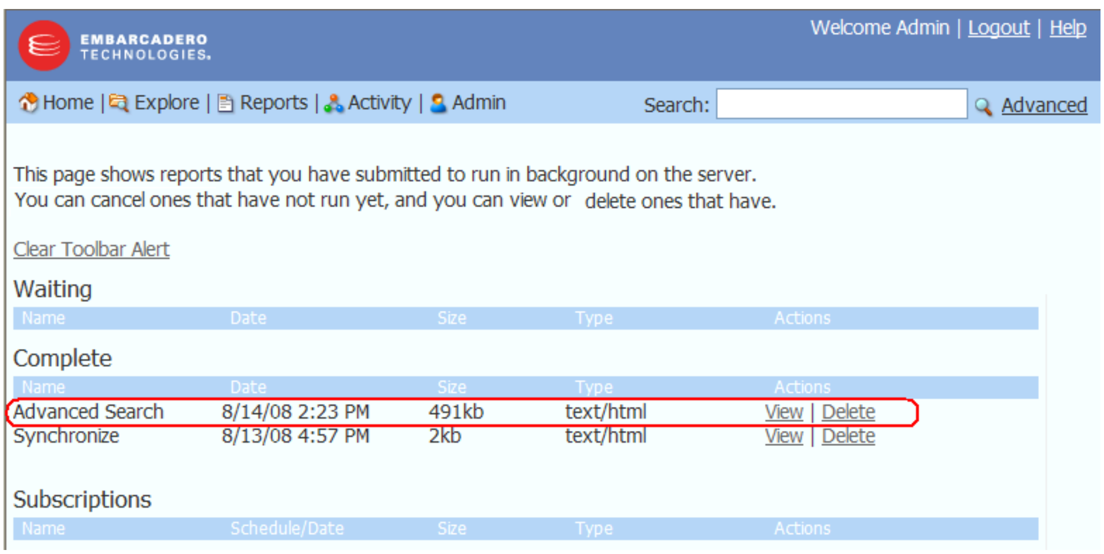


5. Leave the default setting of the **Sort Order** as **Object Type**.



6. Click **Run in Background** and a message window appears telling you that “a job is scheduled for background execution.”

7. Click **View All Scheduled Content** and the **Scheduled Content Web** page appears showing that an Advanced Search has been completed.



8. Click **View** and the **Search Results** report appears.

Session 7: Creating a Custom Report

The AdHoc Reporting function is a five-step wizard walking you through the creation of a business model report. You can configure all the elements of this report including the model type; template style; items to include; constraints, calculations, and sorting filters; and the formatting.

1. On the Dashboard, click **Reports** to display the Solution Browser page.
2. In the **User Actions** area, click **New Report** to display the creation wizard.

Step One

The first step of this creation process is to select a Business Model type. Notice that as you select a model, the associated details and descriptions appear in the panels to the right of the Business Models list.

1. In the **Business Models** area, click **Model**.

   Next, we will apply a template to the report. As you select the different templates a thumbnail of your selection appears in the next panel.

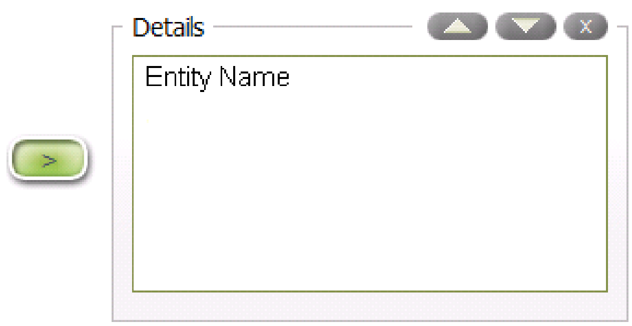
2. In the **Templates** area, click **ERStudio**, and then click **Next**.

Step Two

Select the items you want included. The available items for the Business Model you selected are listed. First we will determine what attributes or columns are to be included in the report. For this exercise we want the report to show Entity Name, Attribute Name, Composite Datatype, Primary Key, and Foreign Key.

1. In the **Entity** section of the **Available Items** area, click **Entity Name**, and then click the arrow located to the left of the **Details** area.

   The selected name appears in this box and the name in the Available Items area is now italicized showing that it has been used.



2. By repeating the process described above, select and move **Attribute Name**, **Composite Data Type**, **Primary Key**, and **Foreign Key** from the **Attribute** area to the **Details** area.

3. You can check the results of your choices by clicking **Go** by the **Preview As** selection box. You can preview your report as HTML, PDF, Excel, or CSV. We will leave the default setting of HTML.

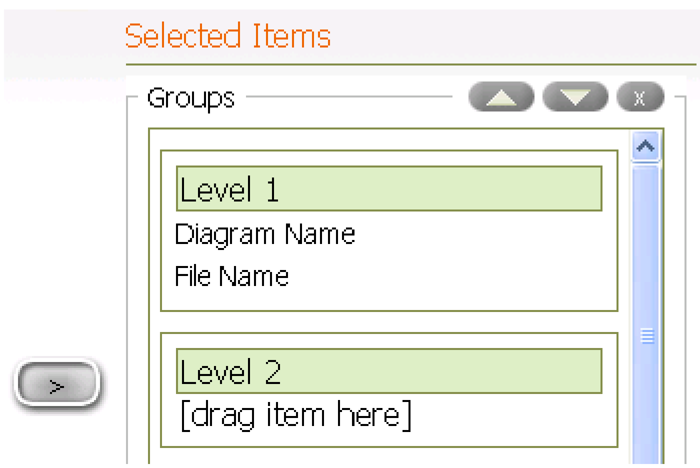
   Your choices result in a report similar to the following.

Entity Name	Primary Key	Foreign Key	Composite Datatype	Attribute Name
activation key	False	False	VARCHAR(32) NOT NULL	act key
activation key	False	True	bigint NOT NULL	activation key group id
activation key	True	False	bigint NOT NULL	activation key id
activation key group	False	False	datetime NOT NULL	creation date
activation key group	False	False	datetime NULL	valid from
activation key group	False	False	DATETIME NULL	valid until
activation key group	False	False	int NOT NULL	key count
activation key group	False	False	int NOT NULL	max reactivations
activation key group	False	False	INTEGER NOT NULL	key count
activation key group	False	False	INTEGER NOT NULL	max reactivations
activation key group	False	False	VARCHAR(256) NOT NULL	description
activation key group	False	True	BIGINT NOT NULL	user account id
activation key group	True	False	bigint NOT NULL	activation key group id

4. Close the Web page to return to Step Two.

5. Next we will select the items that you want to group your data by. Select **Diagram Name** and **File Name** in the **Diagram** section of **Available Items**. Then click the arrow located to the left of the **Groups** section. The items are placed in **Level 1**.

   Note: Select multiple items in a list by holding down the Ctrl key and clicking.



6. Now select **Model Name** in the **Model** section and drag it to **Level 2** in the **Groups** section.

7. Preview your report once again. It should resemble the following example.

EMBARCADERO TECHNOLOGIES

Diagram Name: activation-db.DM1
File Name: activation.DM1
Model Name: Logical

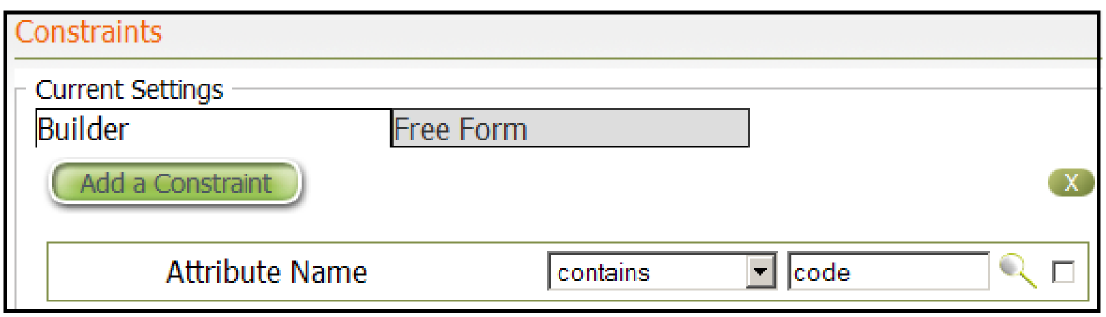
Entity Name	Primary Key	Foreign Key	Composite Datatype	Attribute Name
activation key	True	False	BIGINT NOT NULL	activation key id
activation key group	False	False	DATETIME NOT NULL	creation date
activation key group	False	False	INTEGER NOT NULL	key count
activation key group	False	False	VARCHAR(256) NOT NULL	description
activation key group	False	True	BIGINT NOT NULL	user account id
activation key product	False	False	INTEGER NOT NULL	available threshold
activation key product	False	False	INTEGER NOT NULL	available units
activation key product	False	True	BIGINT NOT NULL	activation key id
activation product	False	False	INTEGER NOT NULL	units
activation product	False	True	BIGINT NOT NULL	activation key group id
activation product	False	True	BIGINT NOT NULL	product code id
capacity	True	False	BIGINT NOT NULL	capacity id
configuration	False	False	VARCHAR(1024) NULL	value
country	False	False	VARCHAR(2) NOT NULL	code2
country	False	False	VARCHAR(2) NOT NULL	continent
customer	False	False	BIT NOT NULL	email verified

8. Click **Next** to advance to Step Three.

Step Three

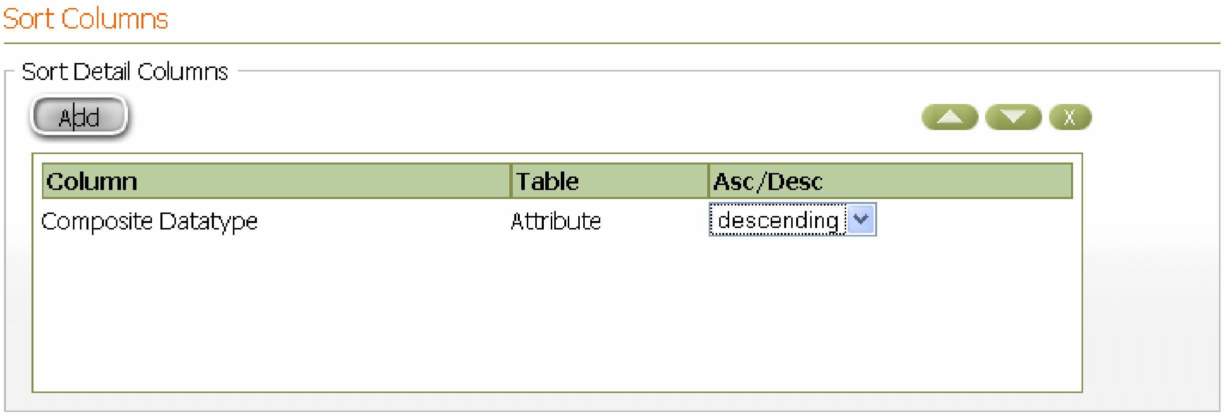
You can set constraints, formatting, calculations, and column sorting. You can also customize the appearance of your selections. In this step we are going to set a constraint where only attributes containing the word “code” are listed.

1. In the **Details** area, click **Attribute Name** and additional information appears on the page.
2. In the **Current Settings** area, click **Add a Constraint**.
3. In the list next to **Attribute Name**, select **Contains** and enter `code` in the text box.



4. In the **Groups** area, click **Diagram Name** and then click **Add a Constraint** in the **Constraints** area.
5. In the **Constraints** list next to **Diagram Name**, select Contains and then enter `AdventureWorks` in the text box.
6. Next we want to set a sort on a Detail. Click **Composite Datatype”**in the **Details** area and then click **Add** in the **Sort Detail Columns** area. The detail **Composite Datatype** is now listed.

7. Select **descending** from the list.



Notice that now when you preview the report, only Attribute Names in the AdventureWorks model containing the text `code` are included, and the columns are sorted in descending order.

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Diagram Name: Adventure Works.DM1
File Name: Adventure Works.DM1
Model Name: Adventure Works

Entity Name	Primary Key	Foreign Key	Composite Datatype	Attribute Name
SalesOrderHeader	False	False	varchar(15) NULL	CreditCardApprovalCode
CountryRegion	True	False	nvarchar(3) NOT NULL	CountryRegionCode
CountryRegionCurrency	True	True	nvarchar(3) NOT NULL	CountryRegionCode
SalesTerritory	False	False	nvarchar(3) NOT NULL	CountryRegionCode
StateProvince	False	True	nvarchar(3) NOT NULL	CountryRegionCode
Address	False	False	nvarchar(15) NOT NULL	PostalCode
Product	False	True	nchar(3) NULL	UnitMeasureCode
BillOfMaterials	False	True	nchar(3) NOT NULL	UnitMeasureCode
CountryRegionCurrency	True	True	nchar(3) NOT NULL	CurrencyCode
Currency	True	False	nchar(3) NOT NULL	CurrencyCode
CurrencyRate	False	True	nchar(3) NOT NULL	CurrencyCode
ProductVendor	False	True	nchar(3) NOT NULL	UnitMeasureCode
StateProvince	False	False	nchar(3) NOT NULL	StateProvinceCode
UnitMeasure	True	False	nchar(3) NOT NULL	UnitMeasureCode

Model Name: Adventure Works DW

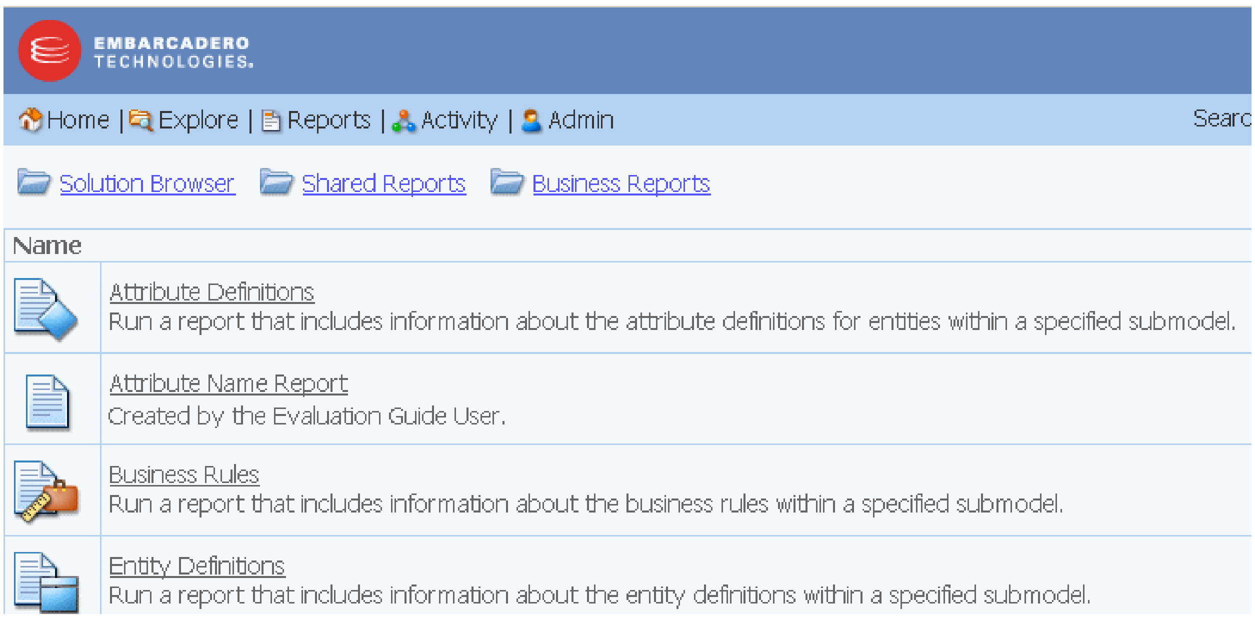
Entity Name	Primary Key	Foreign Key	Composite Datatype	Attribute Name
DimGeography	False	False	nvarchar(3) NULL	CountryRegionCode
DimGeography	False	False	nvarchar(3) NULL	StateProvinceCode
ProspectiveBuyer	False	False	nvarchar(3) NULL	StateProvinceCode
DimGeography	False	False	nvarchar(15) NULL	PostalCode

8. Close the report preview and click **Next** to advanced to Step Four.

Step Four

You can configure the appearance of the report. For this exercise we are going to give our report a title and description, and then save it for future reference.

1. Change the **Orientation** setting to **Landscape**.
2. In the **Report Description** area, enter `Created by the Evaluation Guide User`. This report description appears with the report on the Solution Browser page.
3. In the **Header** area, in the text box, enter `Attribute Name Report` and click **Save**.
4. In the **Save As** dialog enter `Attribute Name Report` and click **Save**.
5. We are going to save this report in the Shared Reports/Business Reports folder. So in the **Select a Solution** area double-click **Shared Reports**.
6. Then double-click **Business Reports**.
7. In the **Save As** area, enter a name for the report.
8. Leave the **Output Type** as **HTML** and click **Save**. You will get a message stating that your report has been saved.
9. Click **Cancel** to close the wizard and return to the Solution Browser.
10. Click **Business Reports** to display the list of shared reports where your custom report is now listed.



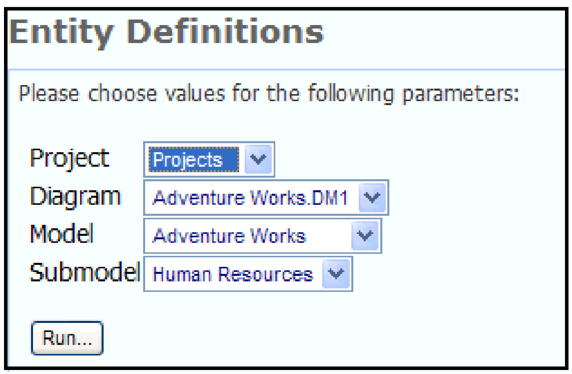
Session 8: Using the Standard Reports

You are provided with several standard reports that you can execute. Reports can be group and organized into folders. The two types of standard reports are Business Reports and Technical Reports.

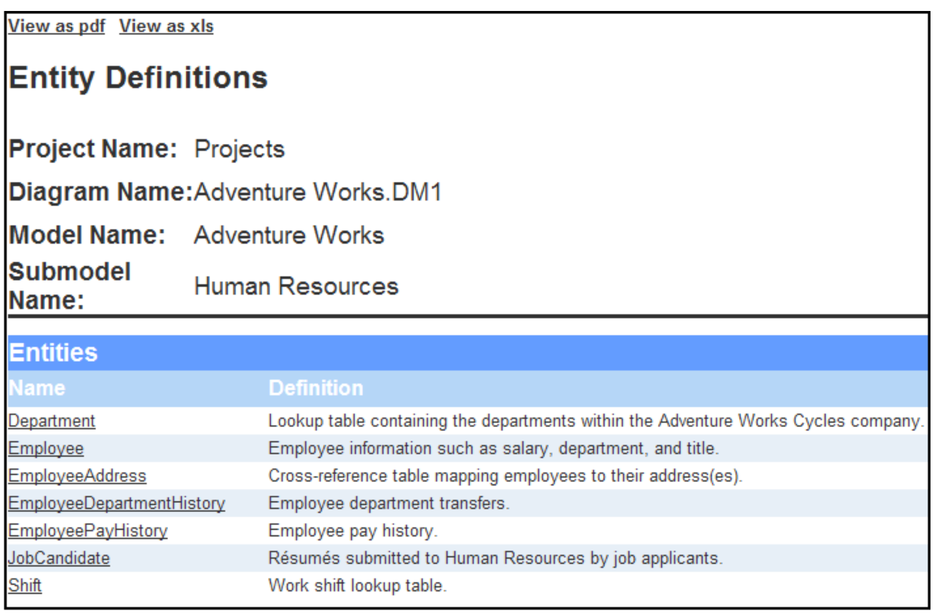
- The Business Reports include Attribute Definitions, Business Rules, and Entity Definitions.
- The Technical Reports include: Column Data Lineage; Domain Bindings; Entity, Submodel, Model, Diagram; Entity Attachments; Reference Values; and Security Classifications.

When choosing to run one of the standard reports, you are prompted to supply parameters that filter and format the results of the report. You can chose to format the report output as HTML, PDF, or XLS. You can restrict the report contents by Project, Diagram, Model, Submodel, and Table/Entity. The prompts to filter the reports are dependent on each other. The diagram filter is dependent on the project filter value.   The model filter is dependent on the diagram filter, etc.

1. Click **Reports** on the dashboard to display the Solution Browser.
2. In this exercise we are going to generate an Entity report so under the **Shared Reports** area click **Business Reports**. A Web page appears listing the three available types, as well as the Attribute Name Report we just created.
3. Click **Entity Definitions** and a Web page appears where you can determine the parameters for the report.
4. Select **1** from the **Project** list. The remaining three fields are automatically populated with the related information.



5. Click **Run** and an Entity Definition report is run. You can save and/or print this report.



View as pdf   View as xls

Entity Definitions

Project Name: Projects

Diagram Name: Adventure Works.DM1

Model Name: Adventure Works

Submodel Name: Human Resources

Entities

Name	Definition
Department	Lookup table containing the departments within the Adventure Works Cycles company.
Employee	Employee information such as salary, department, and title.
EmployeeAddress	Cross-reference table mapping employees to their address(es).
EmployeeDepartmentHistory	Employee department transfers.
EmployeePayHistory	Employee pay history.
JobCandidate	Résumés submitted to Human Resources by job applicants.
Shift	Work shift lookup table.

6. Return to the Solution Browser Web page by closing the report Web page and then clicking the back arrow.

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