

erwin EA Agile V3

User Help Guide

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Legend

CAUTION: A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

IMPORTANT, NOTE, TIP, MOBILE, or VIDEO: An information icon indicates supporting information.

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About Us

Administration

1. In the Account section of the System menu you will find the Admin panel. Here you can edit your users settings, show your API key, change time zone settings and more (depending on your level of access)

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0	28/05/2019 09:34		Ð
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2. Further down the Admin tab you can view your License and Package Settings. Assign licenses to registered users by clicking on 'User' in the License table. You can also enable package updates under the Client Settings tabs and view which packages are available under Packages.

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Remaining Unassigned Licence					
Licence Details					
Licence Type	User	Trial	Expiration	Created	Last Login
Professional			13/05/2020 00:00	31/05/2019 12:18	
Reviewer			13/05/2020 00:00	10/05/2018 15:25	
Reviewer			13/05/2020 00:00	10/05/2018 15:25	
Contributor			13/05/2020 00:00	10/05/2018 15:25	17/07/2018 09:09
Contributor			13/05/2020 00:00	10/05/2018 15:26	29/11/2018 14:01
					Items per page: 5

3. The final section provides details on each user in your application. You can also anonymize a user by clicking on the fingerprint of their card.



Communities

Communities are a defined set of users that work together to achieve a common goal. Organizations have a need to manage different parts of their business in separate hubs. e.g. Marketing ideas need to be kept in marketing whereas HR ideas are kept in HR.

Communities allow companies to create communities of identified groups of individuals or teams. Communities can then work on specific objects and discuss and share them in a private area where they are not visible to other platform users.

For large businesses, this is an excellent option for managing all of their ideas across multiple departments in one platform. We can also invite customers or suppliers to join specific groups to collaborate on ideas and innovation, to deliver shared benefits.

A user may be designated a client administrator. A client administrator has privileges to create/remove communities and also add further admins/members to the community.

By default, an object will have no communities and is therefore visible to all users.

Public and Private communities

There are different types of community that a client administrator may add.

The different community types control the access of communities to concepts within the platform.

Community Types

There are 2 types of community.

- **Public** they are visible to everybody within a company.
- **Private Only** hidden from anybody who is not a member.
- An organization could create a community for financial assessment of a set of ideas for a campaign. This may well be a private community.

An organization could create a community for Development which contains all development staff and development management.

An organization could create a community for Product Management which contains product marketing and the product manager.

Create a Community

Communities can only be created/removed by the client administrator user for the account

Access the communities tab within the Account section of the User menu

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Agile Development Public	Mather	_
Enterprise Architect Public		
Capability Owner Public		
Strategy Leader Public		
General User Public		
Data Governance Administrator Public		
Data Usage Admin Public		
Data Steward Public		
Data Custodian Public		
Business Owner Public		
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To add a new community, select the **Plus** button at the bottom of the page

Fill in the fields to define the community

- Select a Public or Private community
- Give the community a name
- Add an Administrator to the community (they can then manage it)
- Add Members to the community
- Save the community

Notification emails will be sent when you make an admin or add members.

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dministrator			
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The community Administrator can then control the members if this community as needed.

Once a community has been set up a view configurer can control who can see each view by assigning it a community and also edit the permissions of display attributes by assigning them a particular community.

[EA]MyCapabilities_Issues Table		
Name [EA]MyCapabilities_Issues	Icon	Color
Description		
Display name My Issues Default for erwin EA Agile v3		
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DEVOPS Team		
Waterfall Development Team		
Agile Development		
Enterprise Architect		
Capability Owner Display Autobules		

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Application Settings

Users can set global application styles in the Application Settings tab

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			litems per page: 5 🗢 1-4 of 4	$ \langle \cdot \rangle$ Page 1 $ \cdot \rangle > > $

Options available are:

- Disable the global search bar.
- Set input style for Detail views.
- Define table styles by changing the table header color, whether vertical lines are visible and if text should wrap within a cell.

6

MetaModel

Object Types

How Do I Add A New Object Type?

- 1. Go to System then Object Types
- Click the + icon in the list view on the left-hand side of the screen, this will create a blank New Object Type
- 3. Add in the name of your new object type e.g. 'Test Object'
- 4. Add an Icon you wish to assign to the new object type and a color
- 5. You can now add further details of your new object type in 'Description'

← ✓ DETAILS		
Name Test Object	eon 👻	Color
Description This is a test object		
Default View		*

- 6. To add Attributes and their definitions to the new object type click the + icon in details pane on the right of the screen
 - a You can select from a wide variety of Attribute types
 - b For each new Attribute you can provide a Name, Description, Default Value and choose if they are mandatory.

Some Attributes such as 'List' or 'Array' require additional information which are unique to that Attribute type e.g. Key

Attribute Definitions		
Test Attribute		Ⅲ ^
Tripe String +	Name Test Attribute	
Description A test attribute		
Default Value		×
Mandatory		

7. As default views for Object Types are automatically created in the erwin Platform you do not need to define one at this stage. A blue button allowing you to create a view will appear once you save the

Object Type (To find out more about creating Default Views for Object please read the 'Default View' help page)

8. Once you have finished creating your new Object Type click Save in the details pane to finish. Your new Object type will now appear in the list on the left.

How Do I Add an Attribute to an Existing Object Type?

Available Attribute Types

- 1. Boolean Simple true/false attribute
- 2. Integer A whole number not a fraction
- 3. Real Whole number/fraction/positive or negative
- 4. String Text with a limit of 255 characters
- 5. URL Set a URL for use as a clickable hyperlink or an Item Action
- 6. Date Time Set a single point in time
- 7. Date Time Range Define a range of time with a start and end date
- 8. List (Single) Create a single choice list
- 9. List (Multiple) Create a multiple-choice list
- 10. Array (Single) Set a single choice key & value array
- 11. Array (Multiple) Set a multiple-choice key & value array
- 12. Relationship List Create a pick-list from a defined relationship and object type
- 13. Long String Text with a limit of 16,383 characters

Configuring an Attribute

- 1. Go to System then Object Types
- 2. You can either manually scroll through the list or search for a specific Object Type to add an Attribute to
- 3. Clicking on the Object Type in the list to bring up its details
- 4. Click on the blue + button in the bottom right of the details view

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- 6. Select your Attribute Type
- 7. Give your new Attribute a Name & Description
- 8. You can also set a Default Value for new Instances of the Object Type
- 9. And finally, choose if your new Attribute is Mandatory by checking the box
 - a. Some Attributes such as 'List' or 'Array' require additional information which are unique to that Attributes Type e.g. Key
- 10. Once you have finished click 'Save' in the bottom right of the screen.
- For guidance on how to add a newly created Attribute to an existing view on the erwin EDGE Platform please read the **Default View**.

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Relationships

How Do I Create a New Relationship?

- 1. Go to System then Relationship Types.
- 2. Click on the blue + icon in the list view on the bottom left-hand side of the screen, this will create a blank Relationship Type.

← ✓ DETAILS	
Source .	Tarpet -
Source Name	Target Name
Consection	

3. Select the Source Object Type for your new relationship by clicking on the 'Source' field

- a. Once you've selected your Source give it a name
- 4. Select the Target Object Type for your new relationship by clicking on the 'Target' field
 - a. Once you've selected your Target give it a name
- 5. Select if your relationship is a Composition

i

The composition relationship is a stronger form of relationship. If a relationship is a 'composition' relationship, then the child object is unique to the parent in that relationship. For instance, if "Country" object type "contains" "City" object type and the "contains" relationship is a composition then the "City" is unique to the "Country" e.g. "Birmingham" is a city in "UK" and "Birmingham" is a different city in "USA". An object type can have multiple composition relationship types but only one can be populated at any one time. Attempting to populate a second composition relationship for an object will result in an error.

6. Once you have finished creating your Relationship Type click Save in the details pane to finish. Your new Relationship Type will now appear in the list on the left.

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associated with/is associated with al/Innovation idea		
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is vendor of/is vendor for plication component/External Party		
SME of/is SME for ication component/Person		
owner of/is owner of lication component/Person		
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Workspaces

Important information about workspaces includes the following:

- There is only one default Workspaces for a client area.
- All workspaces in the client area, share the same underlying metamodel.
- Workspaces can be assigned to Communities, for access control.
- Workspaces are blank after creation.
- Model Data can be between workspace via export/import.

How do I create a Workspace?

1. Client areas support workspaces. Workspaces may be set up by an administrator using the User Menu > System > Workspaces option.



2. Click the blue '+' button at the bottom of the workspace list, this will bring up a blank form to create your new workspace

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- 3. Enter a Name, Description & Icon for your new Workspace. You can also restrict a Workspace to a community if you wish.
- 4. Click 'Save' when complete.

How do I add a Workspace picker to a view?

- Workspaces can be selected for any view, parent, or child. If a workspace is not defined for a child view it will take the workspace of its parent view.
 - 1. Go into the configuration panel for the view you wish to add a workspace picker for.

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- 2. Click on the 'Customisation' tab, open the 'Workspaces' accordion and select 'Allow Multiple Workspaces'.
- 3. A picker will now appear for the chosen view showing you the name of the workspace you are currently working in. Clicking on the picker will bring up a list of workspaces you can select from.

Default		Ŧ
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Default Workspace 2 Workspace 3		
Workspace 3		

CSV Import

1. Go to the System Menu then select Bulk Imports



- 2. You will be presented with a list of all previous imports, if you wish to start a new Import click the blue + button.
- 3. Select your Column and Value delimiter, then either drag your file into the selection box or click the button to navigate through your file manager.

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Completed with errors by Jame Knowles on 22/07/2010 16/45	Object Import (CSV)
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4. Once you have selected 'Import' your file is added to the import queue. You are then able to track the progress of the import and then once completed see a report of what errors have occurred.

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		Message	Finished reading input source: Application_componen	import	1	22/07/2019 14:45
		Message	Changed Bulk Import Status to "Importing Objects"	import	1	22/07/2019 14:45
		O Enor	Relationship already exists	Application_component.cov	2	22/07/2019 14:45
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CSV Export

1. Through the system menu navigate to Bulk Exports.



2. You will be presented with a list of all previous exports, their status, and a download link for the file. If you wish to create a new export press the blue + button in the bottom right corner.

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Exports				÷
Created Eats	Creator	Status	Download Link	
22/07/2319 14-41	Jamie Knowles	Completed	Download	
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- 3. Select your Column and Value delimiter and then your object selection.
- 4. You can select a single object type or multiple and also define further criteria e.g. status equals or has a relationship with object X

Export							
Column Delimiter				Value Delimiter			
* Encoding				¥ ;			*
UTF-8							*
Criteria							
Object Type							
Application c	omponent				٣	+	Î
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							CREATE
Export							
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5. You will receive an email when your export is complete.

Communities

How Do I Create a New Community?

Communities allows Administrators to place Users into groups. Which Community a User is place in will define their experience within the erwin EDGE Platform.

When creating Views within the erwin EDGE Platform you have the opportunity to restrict the view to a certain Community or multiple Communities. To find out more visit our 'How Do I Restrict a View to a Select Community?' help page below.

1. Go to Settings > Account

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2. Click on the 'Communities' tab

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Data Usage Admin Public	O DGAdmin		
Data Governance Administrator Public	G Dris Put 0	>	< *
General User Public			
Data Custodian Public			
Business Owner Public			

- 3. A list of Communities appears on the right of the screen, clicking on a Community in the list will bring up its details
- 4. To add a new Community, press the blue + button at the bottom of the list view

B ADMIN & CONMUNITIES		
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Data Usage Admin Public		
Data Governance Administrator Public		
General User Public		
Data Custodian Public		
Business Owner Public		
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5. This will bring up an empty Details form



- a. You can set your Community to be either 'Public' or 'Private'
 - i. A Public Community is visible to everyone
 - ii. A Private Community is visible only to those within it
- b. Enter a Name for your newly created community
- c. Choose an Administrator from a list of Users
- d. Select the members you wish to be a part of the Community.
- 6. Click Save' in the bottom right of the screen

How Do I Add or Remove Users to An Existing Community?

Only the administrator of a Community has the ability to add or remove members.

1. Go to Settings > Account

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2. Click on the 'Communities' tab

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General User Public					
Data Custodian Public					
Business Owner Public					

- 3. A list of Communities appears on the left of the screen, clicking on a Community in the list will bring up its details
- 4. Click on the 'Members' field and a pick list will appear of all Users on your erwin EDGE Platform.

Type Public ~	Name Data Steward	
Administrator DGAdmin		*
▼ Filter		
Amy Clarke		
Natasha Brennan		
C Chris Putt		
C Chris Putt Leslie Finds Mark Taylor		
Mark Taylor		

- a. Those Users with a blue tick next to their name are members of the Community
- b. To add or remove a User click their name
- 5. Click 'Save' in the bottom right of the screen.
- For more on Users, including how to create a new User & assign them a Person Object visit the **Create New User** help file.

How Do I Restrict a View to a Single Community or Set of Communities?

- When creating Views within the erwin EDGE Platform you can restrict the view to a certain Community. To allow a view to be seen by all Communities simply leave the field blank.
 - 1. Select the View you wish to restrict by clicking on the pen Icon of that View

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2. All Views have a Communities field

G_BG_Reports Tabs			
G_BG_Reports	**	÷	•
Description			
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Default for Data Governance			
Communities			•

3. Click on the field to reveal a pick list of all your Communities

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	Data Steward	
Ŀ.	Data Usage Admin	
	Data Governance Administrator	
	General User	
	Data Custodian	
1	Columns Rows Accordion Tabs	

4. Select the Communities you wish to restrict the view to by clicking on their names

	▼ Fiher	
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-	Data Governance Administrator	
ņ	General User	
	Data Custodian	~
	Business Owner	

5. Click 'Save' in the bottom right of the pane to finish.

Registering a new user of EA Agile

For EA Agile there are multiple steps to set up new users. Once you have created a new User you **must** assign them a community & create and allocated a Person Object (please read below for further guidance)

- 1. Create the user
- 2. Allocate a license
- 3. Allocate to a Community (Role)
- 4. Create and allocate a person object (only for active contributor roles)

Create the user

First, log in as the client administrator and go to the account tab.

Find the Register New users button

My Client Nume DDTris Administrator DGAdmin Access1							
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	🚴 En	terpmen – Förseture Agile ta Modeler NoSQL	Available Licences: 0:03 Available Licences: 0:03 Available Licences: 0:03 Mark Taylor markspör,217 Gyttal@evin.com User has not logged in S Et Aglie: No Licence © MN x882 Licence	ending requests	lesliefinds_217 dgtrial@erwin.com User has not logged in C EA Agile: No Licence DM NoSQL: No Licence		~

Provide the email address of the user and hit OK.

This sends an activation email to the user which asks them to visit a temporary registration link



You will see a list of users that have been registered users that have not activated their accounts in the Register New users section

Register New Users			+	Ŧ
Email Address	¢	Created	\$	
dgtrial@erwin.com		02/05/2018 03:32 PM		Θ
		Items per page: 5 × 1-1 of 1		

Allocate a License

Even before users have activated their accounts you can allocate them a license.

There are three license types available

- Reviewer used by the General User role. Has read only access to all object types. Can create new objects such as issues but populate only the name, description and create relationships.
- Contributor the 'full' license that allows creation, update and deletion of all object types
- Professional this license allows the modification of the metamodel and views. This is currently restricted but will be available soon to allow customers to modify their own area.

In the product you are assigning licenses for find an available slot and allocate the user. Only users with no license appear in the dropdown.

Remaining Unas	1/4 Contributer 0/1 Reviewer	1/6 Total		
Licence Details	3			Ŧ
Licence Type	User 🗢 Trial	⇐ Expiration	Created 🔶	Last Login 🔶
Reviewer	A amyclarke_217	01/29/2019 06:51 PM	12/11/2017 06:51 PM	01/31/2018 05:11 PM
Contributor	≑Filter	01/29/2019 06:51 PM	12/11/2017 06:51 PM	
Contributor	Lesliefinds_217	01/29/2019 06:51 PM	12/11/2017 06:51 PM	
Contributor	dgtrial@erwin.com	01/29/2019 06:51 PM	12/11/2017 06:51 PM	
Contributor	N natashabrennan_2 🔽	01/29/2019 06:51 PM	12/11/2017 06:51 PM	
		Items p	er page: 5 👻	1-5 of 6 < 🗲 🗲

Allocate to a Community (Role)

You now have a user with a license. Now you can assign them to a role

Go to the communities tab

Q Search		 A D
- :	← ✓ DETAILS	
Business Owner Public	Type Name Publi ~ Data Steward	
Data Usage Admin Public	Administrator DGAdmin217 Members	Ŧ
Data Governance Administrator Public	Chris Putt (2)	× •
Data Custodian Public		
Data Steward Public		
General User Public		

Select the community you wish to add users to.

Clicking on the Members property allows you to add and remove users from this group

\checkmark

Create and allocate a person object (only for active contributor roles)

For all roles that have workflow elements e.g.. Data Governance Administrator, Data Steward, Business Owner, Data Custodian etc you will need to provide them with a Person Object that can hold additional details on the person and appear is selectable dropdowns.

This can be done by the site administrator or the Data Governance Administrator.

Go to the 'People' tab.

Hit the +	sign to	add a	new	Person	object
-----------	---------	-------	-----	--------	--------

© DG	Q Search		🖌 🗄 🔺 🖸
0	Home	People	
0	Business Glossary	name	represents
	Dete Distingen	Amy Clarke	amyclarke_217 💿
	Data Dictionary	Chris Putt	chrisputt_217 🛞
	Governance	Ed Clarke	
0	My Work Items	Harry Smiles	
	My Data Sets	Helen Carter	
0	My Data Sets	Jamie Knowles	
8	Work Items Adminis	Leslie Finds	▲ lesliefinds_217 ⊗
	My Issues	Mark Taylor	📥 marktaylor_217 🕲
	Decele	Natasha Brennan	🔺 natashabrennan_217 💿
-	People	Rebecca Rose	
*	Data Usage		Items per page: 50 → 1-10 of 10 < >
Ť	My Stuff		
0	All Object View		
			•

Populate the basic details for the person

Through the Professional license you can add additional properties to the person object.

_				
© DG	Q Search		Person	
0	Home	People	DETAILS STEWARDSHIP OWNERSHIP	
	Business Glossary	na na	NeTH 	
U		An	Description	
C	Data Dictionary	Ch Ch		
	Governance	Ed	General	~
0	My Work Items	Пна	Data Governance Roles	~
0	My Data Sets	— не	Audit	~
0	Wy Data Sets			
8	Work Items Adminis			
0	My Issues			
•	People			
		Re		
A	Data Usage			
•	My Stuff			
0	All Object View			
_				
				SAVE

Then connect the person to the username they provided and Save the object

Leslie Finds Person				
DETAILS STEWARDSHIP OW	IERSHIP			
Name Leslie Finds				
Description				
General				^
Notes				
≑Filter				_
				:
DGAdmin217				
arktaylor_217				
lesliefinds_217				
chrisputt_217				
natashabrennan_217				
E DELETE			DUPLICATE	SAVE

The user is now set up and ready to go!

Data Source

Journeys

Journeys allow us to create a data set of objects related to a context object. They are a powerful way to perform analysis on the model. The data set output of the journey can be displayed through several view types such as Tree, Diagram and Table. The approach is that the configurer can define a number of paths in the journey starting from the context. There can be branches and iterations with the result data set having the structure of a tree.

How To Create a Journey

Although Journeys appear throughout the configuration of the erwin EDGE Platform they are only current active in Tree Views, Table Views and Diagrams.

First, we define the starting point, that is, the context of the journey. We tell the tool what is the object type of this context. From then on the tool will assist us in building this journey

Journey		
Include Context Object(s)		
Context		-

- 1. You will need to select an Object Type for your Journey to take context from
 - a. Click on the Context menu
 - b. Select the Object Type you'd like your Journey to take Context from (You can select multiple)

⊤Filter	
cap	
ط Capability	✓
Capability increment	
Block Filter Inheritance	

c. If you want to display the Context Object select 'Include Context Object(s)'



2. Next, you need to create a Root. Pressing the blue menu circle will bring up two options: Create Root or Create Child



- You must always create a Root before creating a Child or beginning a series of Children.
 - 3. Click 'Create Root' to bring up a blank form

Capability 😒		×
MEW PATH	× Path Type step	
	Label	
	Relationship Type	
	Object Type	
Filter Inheritance		

a. First, choose your Path Type. You have 3 options to choose from:

≂Filter		
step		
go-to-step		
go-to-start		

- b. Create a label for your Path
- c. Choose a Relationship Type for your Path to display. A list of Relationships of your Context Object Type are displayed in a pick list
- d. You will then need to select an Object Type. Your list of Object Types is determined by the Relationship Type you choose in the previous step
- e. If you wish to not display the results of this step you can select 'Ignore Results'



!

f. If you wish to create a Child for this Root click 'Create Child' and repeat steps 3a - 3e (You can also create a Child for a Child)

For Journeys in Diagrams there are extra steps 'Grouping' and 'Block Duplicates'.

- Click 'Add Grouping' and select a Step that is a part of your Journey from a drop-down menu. This will allow you to display box-in-box in a diagram
- To block duplicates click 'Block Duplicates For Step' and select a Step that is a part of your Journey from a drop-down menu
Filters

How Do I Create a New Filter?

- Filters are used throughout the erwin EDGE Platform, they allow users to create views that can answer very specific questions, more general ones and also drive workflows. Filters also have the ability to be daisy chained.
- 1. Go to Settings > Filter
- 2. Click the blue + icon in the list view on the left-hand side of the screen *This will create a new blank Filter*
- 3. Add a name of your new filter e.g. 'Confidential Business Terms'
- 4. Add a description of your filter

turne Hýp Per Copublity				
Description				
Paranters + Add Premierer				
Chera				
Clear Texe Capability			+	1
Ly AND Overall Performance - Equals - High	÷	Σ	+	
ADD NEW QUJECT TYPE CHITERA				

- 5. Next, select the Object Type you which to filter by. You can choose from any object type within the system
 - a. If you wish to only filter by Object Type with no further criteria press the Trash icon on the additional criteria and click save. In this example the filter created would display all Business Terms.
- To add further criteria, press the add Object Type Criteria button (the '+' icon next to the Object Type)
 - a. Your first additional operator will be an AND, every additional operator afterward will be an OR
 - b. You now need to select the Object Type Criteria you wish to filter by. There are 4 main criteria categories
 - i. 'Is Object' You can select individual Objects of that Object Type
 - ii. 'Use Filter' Will only show Objects of your selected Object Type that appear as results of the selected filter
 - iii. 'Generic Properties' Properties that are of all Object Types
 - iv. 'Attribute Properties' Attributes of that specific Object Type
 - c. Select your property you wish to filter by. Depending on which Property you select you will be presented with a number of diiferent Operators

- i. 'Is Object' Equals, Does not equal
- ii. 'Use Filter' Is in filter, Is not in filter
- 'Generic Properties' Equals, Does not equal, Starts with, Does not start with, Contains, Does not contain, Ends with, Does not end with
- iv. 'Attribute Properties' Equals, Does not equal, Has value, Does not have value
- d. You must then select a Value you wish to filter by. Depending on the criteria you selected you can either enter a Value or select a Value from a picklist
- e. If you wish to add another step e.g. Confidential Business Terms that are GDPR Critical click the '+' button next to your first operator
- f. This will add an additional branch for you to enter your additional criteria

Criteria			
Client Type Business Term	-	+	i.
Property Operation Value L AND Confidentiality - Equals - Confidential	•	+	Î
Property Councilion Vision L Critical To Regulation - Equals - GDPR Critical	•	+	î
ADD NEW OBJECT TYPE CRITENIA			

This step can be repeated for additional criteria.

g. If you wish to enter further Object Type Criteria to filter by you can click the add button in Step 'f'. You can also add an additional Object Type to the filter by pressing 'Add Object Type' and repeat from step 'e'.

Context

An important concept to understand is Context. When an object is clicked in a view the configurer can specify the actions to occur upon click. This may be "Open In Panel" which opens a new panel with whatever view type is selected, or "Set Context". When creating complex view structures sub views can receive a context node and then display it accordingly.

On the erwin EDGE Platform context is denoted with an arrow. In the example below, numerous views take context from another.

EA_D10_Domain_Motivation_Drivers_List				1
EA_D10_Domain_Motivation_Drivers_Listvi	/	← 0T_Driver_DG_BASE		1
Drivers: Weak 🗇	-	Allocation of resource by economic systems Drear 2000	8768	Ø
	۹	↑ OT_Driver_DG_TABS		1
Allocation of resource by economic system	ms	DETAILS REALIZATION RELATIONSHIPS + Add View to OT_Driver_DG_TABS		
Bernand for Technology Solutions		↑ OT_Driver_DG_DETAILS_LAYOUT		1
Demand for reclinology solutions		↑ OT_Driver_DG_COMMON_DETAILS		1
Effect of the European Union policies on the European Union	he U	Name Allocation of resource by economic systems		
😥 EU Emissions Regulations Changes		Description The controllic system answers questions like who is the owner of resources, what process of decision making is used for resource allocation and which incentives drive the economic decision making.		
Impact of UK fiscal and monetary policy o		The types of economic systems are Socialist economic system in which the complete power of allocation of the scarce resources to the businesses lies with the government of the country, whereas Capital economic systems are in which the government describ have much interference in the business argumentations and the resources are analocated with the high of market drives firstes. The resources are not business are the standard and the standard argument describ have much interference in the business argumentation and the resources are analocated with the high enserval as an analocated with the high enserval as analocated with the standard as an advected with the assume as an advected with the high enserval as an advected with high enserval as an advected with the high enserval as an advected with high enserval as an advected with the high enserval as an advected	stly ow	
International Security Requirements		organizations (Hall & Lieberman, 2009). The resource allocation is most efficient in Mixed economic system. In UK, mixed economic system is followed. Therefore, several operations of the airport, related to security and safety, economic, transport, price, etc. are regulated by the policies of the government, Civil Aviation Authority as well as the Airport Rolf.)o finar	sce,
Passengers are choosing alternative airpo	rts	↑ OT_Driver_DG_ACCORDION		1
Pricing and output decisions of the Airpor	t on	General	v	
	_	Goals	~	
RFID (Near Field Technology) for Positioni	ng	Audit	v	
G		+ Add View to OT_Driver_DG_ACCORDION		
		DELETE OUPUCATE	8 5	AVE

When setting the context for a view you have two options:

Views						^
	EA_D10_Domain_Motivation_Drivers_Lig*	×	Ŧ			×
	Display Condition		Ŧ	Specific Context Relationship	÷	
	Take Context From None		Ŧ	Only Render With Context		
***	Default View For Type	×	Ŧ			×
	Display Condition		Ŧ	Specific Context Relationship	*	
	▼Filter			Only Render With Context		
Add \	, All					
	Views In This Layout					
	Views Above This Layout					
	None					

1. Views Above This Layout: The view will take context from the layout above it.

e.g. The list of Objects above requires context from the list of Glossaries.

2. Views In This Layout: The view will take context from other views in that layout

e.g. The Object Type view for an Object Instance takes context from the list. Both are within the same layout.

Queries

i Queries are an advanced data source that can be used within Table Views. Unlike the 'Journey' data source they allow users to configure a journey through the metamodel and add properties for each Element of the journey. They also benefit from being more performant than the other data sources and allow for users to sort and filter by column.

									*
Capability Name	Ŧ	Capability Business Importance	$\overline{\cdot}$	Capability Business capability performance	Ŧ	Application component Name	Ŧ	Application component Lifecycle status	-
Gargo		Low-Medium		Consistently		Air Cargo System		Phasing Out	
Reservation Ticketing		Low-Medium		Is a recogniz		Central Reservation System		Live	
Reservation Ticketing		Low-Medium		Is a recogniz		CRM System		Phasing Out	
Reservation Ticketing		Low-Medium		Is a recogniz		ChekDesk		Dive Live	
Passenger Service		Critical		Strong pain p		ChekDesk		Live	
Passenger Service		Critical		Strong pain p		Boarding Control		Phasing Out	
Passenger Service		Critical		Strong pain p		CyberCheck		Proposed	
Passenger Service		Critical		Strong pain p		PrintPass		Phasing Out	
Passenger Service		Critical		Strong pain p		CheckID		D Live	
Airport Infrastructure		Medium				Boarding Control		Phasing Out	
Baggage Management		Critical		Is a recogniz		Air Cargo System		Phasing Out	

An example of a Table View using a Query data source to display a journey from Capability to Application Component whilst display properties of each element

[EA]MyCa Table	apabilities_Table			
Name [EA]MyCapabiliti	es_Table		Icon	Color
Description				
Display name My Capabilities	Table			
Default for erwin EA A	gile v3			
Communities				٣
CONFIGURATION	CUSTOMIZATION			
View Type	Table			~
Data Source				^
Source of Data Query				Ŧ

1. Select 'Query' from Data Source

- 2. Select the Elements you wish to display in your table
 - a. You can give them Alias if you wish although these are automatically generated
 - b. If selecting multiple elements you will be required to select a source element and relationship

c. If you wish to display elements even if the returned relationship is empty (e.g. a capability with no application components). Users must make sure 'Optional' is checked for that step in the journey, see figure c

Element Selection				+	
Element Type Capability	Capability				
Element Type Application compc -	Alias Application componer	Source Element Capability -	Relationship From Source is associated vith	:	
	figure b				
Element Selection	1				+
Capability -	Alias Capability				
Element Type Application compo	Alias Application compo	Source Element	Relationship From is associated with	î	Delete
Properties					Optional

figure c

- 3. Next, select the properties of the objects you wish to display (these will be used as columns within your table)
 - a. If you wish your Table to take context you **must** include the ID as a property of the element
 e.g. A table displaying all application components from a context Capability would require a property of ID from Capability.

Properties					+
Capability	•	Property Name	•	Alias Capability Name	Î
Element Alias Capability	•	Property Business Importance	•	Alias Capability Business Importance	Î
Element Alias	-	Property Business capability perform	•	Alias Capability Business capability p	Î
Element Alias Application component	•	Property Name	•	Alias Application component Name	Î
Element Alias Application component	•	Property Lifecycle status	•	Alias Application component Lifecycl	Î

4. If you wish, you can also set Conditions on your properties. For example for Capability: Business Importance, only return those that are Medium

Conditions								+
	Property Capability Business Importance	•	Operator Contains	•	Medium	•	<>	Î

5. Only if you are taking context from another object must you select an Attribute to Apply Context To. If you don't require context skip to step 6.

Attribute To Apply Context To			
			Ψ.

- 6. Finally, users can configure their Display Attributes. Users can:
 - a. Re-arrange
 - b. Remove (perhaps if an ID is used for context purposes)
 - c. Set read-write permissions
 - d. Set tooltip attribute
 - e. Configure Click Behaviour
- 7. Once complete, click Save.

Views

New View

How Do I Create a New View

There are two main ways to create a new view in the erwin EDGE Platform: Through the System menu or when in Configuration Mode, through the blue + button found in view selection lists.

The following instructions explain how to create a View on the erwin EDGE Platform. Every View involves the same basic steps found below. Once you have followed these initial steps you will need to configure the type of view you have selected.

Through the system menu

- 1. Go to System > Views
- 2. Click on the + button in the top right corner

Vews ann ann parsed,th 65 // parsed,th 65 //	+ =
projit ©	1 .
a)M 60	
g).it.cotiani GD	
sphiadau_shhietura CD	
zpo/tuar/th/project/couputs	

- 3. Click '+ Add View to The Application'
- 4. The following box will appear on the screen

Add View to The Application		
View		•
Take Context From Views In This Layout		•
Specific Context Relationship		-
Only Render With Context		
	CANCEL	ADD

5. Click on the View field and click the blue + button to open a New View panel



Through a view selection list

1. Click on the blue + button at the bottom of the list when you click on a View field

CONF	IGURATION	CUSTOMIZATION		
Viev	v Туре	Columns		\sim
Colu	imns Config	guration		~
Views				^
::	≂Filter			\times
	🔁 Def	ault View For Type	Specific Context Relationship	
	😑 par	aap_list	Only Render With Context	
	😑 ap_	list		
	🔁 ap_	list_container		×
	😑 app	lication_architecture +		
	Display Cor	ndition 👻	Specific Context Relationship 🔹	
	Take Context	From This Layout -	Only Render With Context	
	views in i	nis Edyout		
Add \	/iew			

2. This will open up a New View panel.

Configuring the New View

i

- There are two types of Views on the erwin EDGE Platform: UX Views & Object Type Views. UX Views are used to provide a value-driven workflow for different roles. Object Type Views provide a view of an Object Instance in the model that answer specific questions about that Instance.
- In your new View you will need to name the New View (this will be the name you use when you wish to create a path to your view), create a Description and give it a Display name. You can also give the view an Icon and Color
 - a. If you wish the View to only be seen by certain communities, you are able to select those in the 'Communities' field. If you wish the View to be seen by all leave this field blank

Tal	DS									
Descriptio	n									
Display na	ime									
Default for en	win EA Agile v3	3								
ommuniti	es									
CONFIGUR	ATION C	USTOMIZATIO	DN							
/iew Type	•									
ayout Viev	vs									
Tabs Collection \	Columns /iews	Rows	Accordion							
		۲	t	≡	1		AW	٨	1.	\sim
Table	Kanban	Nested List	Tree	List	Diagram	Count	Wordcloud	Roadmap	Bar Chart	Scatter Chart
⊞										
Pivot Table										
em Views										
≣										
Details	WS									
Α										
Rich Text										

2. You will now need to choose what type of View you wish to have. We will go through in more detail the different types and how to set them up below.

Collection Views on the erwin EDGE Platform are driven by either context or a Data Source. If your view does not take context from another view then it will require a Data Source to display the relevant information. For more information on Data Source please visit the Filters help file.

CONFIGURATION	CUSTOMIZATION	
View Type	Table	~
Data Source		^
Source of Data Filter		Ť
Filter		~
Block Filter Inheritance		
Display Attribute	25	~

.

3. The Customization tab within a view configuration window is where all non-essential configuration is found. Such as adding Overlay Filters, Overlay Heatmaps & Actions to your view. For more information on how to add those features please visit their help pages found below

- Filters
- Heatmaps
- Actions
- 4. Users can also set Styles, Actions, Item Actions, Icon Attributes, Click Behaviour and enable Workspaces in Configuration. More information on these customizations can be found in their respective help files.
- You will now need to configure the type of view you selected in Step 2. Click on the links below for a help file on each view.

Layout Views

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Columns, Rows, Accordion, Tabs
Collection Views
Kanban, Roadmap, List
Details
Rich Text

- 5. Once you have finished configuring your view click Save to complete your view.
- If you created the view through the System Menu your view will be saved in the system and you will be taken back to the box found in Step 4 of 'How Do I Create a New View'

To edit further click 'ADD' and your new view will be displayed. 'Cancel' will remove the box.

Add View to The Application		
View ap_list_container	×	Ŧ
Take Context From None		Ŧ
Display Condition		Ŧ
Specific Context Relationship		Ŧ
Only Render With Context		
	CANCEL	ADD

Adding a Display Condition

Users can add Display Conditions to Views so that they only appear is certain criteria is met. E.g. If an application is in 'Live' stage then display additional tab.

These can be added where-ever a view is added to the application and use filters.

Default View

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How Do I Create a Default View for an Object Type?

- Default views are a set of standard view configurations created by the erwin EDGE Platform These views will allow you to see object instances e.g. when clicked on in a list. The Default Views consist of a base view displaying Object Type icon, a 'Details' tab with Object instance Name & Description and an accordion view with panels; 'General' & 'Audit'
- 1. Select an Object Type from the list view in Settings > Object Types

- :	← ✓ DETALS		
Test Object This is a test object	Nore Test Client	θ -	ē
Sections	Description This is a test object		
Risk Profile	Drifaul View Consta Subsidi View		÷
BPMN Event	Antipa before a		
BPMN Task	Test Attribute String		×

2. Click 'Create Default View' and then OK to confirm

← ✓ DETAILS	
Name	
Test Object	
Description	
This is a test object	
Default View OT_Test Object_DG_BASE	

3. Once you have finished click 'Save' in the details pane.

The erwin EDGE Platform has now created a default view for your Object Type, so you are able to view it and its Attributes throughout the system. Each default view consists of a 'Details Tab' which will include basic information about your Object and an Accordion view of General Attributes and Audit Attributes. You are able to configure and add to these views, this is covered in 'How Do I Edit Object Type Default Views' below

Kingle a Q Search	∞ Ⅲ 🔺 🗊
DT_Test Object_EA Agile v3_bGnfv_BASE	1
	Z
↑OT_Test Object_EA Agile v3_bGnfv_TABS	1
DETAILS + Add View to OT_Test Object_EA Agile v3_bGnfv_TABS	
↑ OT_Test Object_EA Agile v3_bGnfv_DETAILS_LAYOUT	1
↑ OT_Test Object_EA Agile v3_bGnfv_COMMON_DETAILS	/
↑ OT_Test Object_EA Agile v3_bGnfv_ACCORDION	1
General	~
Audit	v
+ Add View to 0T_Test Object_EA Agile v3_b0	ITV_ACCORDION
+ Add View to OT_Test Object_EA Agile v3_b0nf	DETAILS_LAYOUT

How Do I Edit a Default View for an Object Type?

The default view on the erwin EDGE Platform provides a basic set of views displaying basic Attributes. In order for a default view to provide value you will need to configure it to display information relevant and important to you.

Display additional Attributes in the Accordion

1. Through either the System Menu or clicking the Configuration Mode button find the view you wish to edit

A Ageneral Q. Search		0T_Test Object_EA Agile v2_bGnfr_BASE Columns	
Test Object	← VETALS TROBEC TROBEC	Nume 01, Test Digest, EA Agrile v0, NGrife, BASE	kon Color
Idea a thought or suggestion as to a possible course of action		Description Display name	
Innovation Idea a thought or suggestion as to a possible course of action	Control Object, EA Agile v3.b0mb, EASE	Islaat for one BJ.Agla vi	
erwin Application Service Solution	Ambute Definitions No attribute definitions. Add the first		
Feeing		View Type Columns	Ŷ
Collector Custom Job This type jeb represents an external executable. It may b		Columns Configuration Views	~
Collector Job Sequence Represents a list of standard and custom jobs to be exec.			
Collector Log			
Collector Configuration Groups workflows in turns of addressed CM model/EA Collector Adapter - PUT			
Collector Adapter - PUT			
Collector Workflow			
S Cost Centre			
Business actor A business actor is an organizational entity that 1	a delete	DULETE RESET USER LAYOUTS	DUPLICATE VIEW SAVE

2. Continue through Views by clicking on the Configuration Icon until you reach the Accordion View

::	View OT_Test Object_DG_GENERAL	\times	-	Take Context From Views Above This Layout	Ŧ
	Specific Context Relationship		Ŧ	Only Render With Context	
	View OT_Test Object_DG_AUDIT	\times	•	Take Context From Views Above This Layout	.
	Specific Context Relationship		•	Only Render With Context	

The Accordion View is made up of Details Views which display Object Type Attributes. To display the Properties you want in a new Accordion panel you will need to create a *Details View.*

3. Click 'Add View' to bring up a blank View form

.

0 0 0 0 0 0	View	*	Take Context From Views In This Layout	~	×
	Specific Context Relationship	•	Only Render With Context		
Add V	liew				

- 4. Set Context to 'Views Above This Layout'
- 5. Following the *New View* help file, create a new Details View.
- Note, as you're in configuration mode you will need to follow the instructions found at the bottom of the *New View* guide.

Details View

How Do I Create a Details View?

Before starting you must read and follow the instructions in the *New View* help page.

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A Details View allows you to display Attributes of an Object Type Instance. This type of view is commonly used for Object Type views, when first accessing the Platform you may need to edit the default view to display the Attributes you wish; this is done by creating or editing a Details View.

1. Select 'Details' from Item Views.

Applications Details	
lame ppplications	Icon Color
Description	
isplay name Application Details	
iefault for erwin EA Agile v3	
Communities	
CONFIGURATION CUSTOMIZATION	
/iew Type	
ayout Views	
Tabs Columns Rows Accordion	
ollection Views	
🏢 🎟 🗢 大 🔳 👗 🔘 🖉	• • • •
Table Kanban Nested Tree List Diagram Count Wor List	dcloud Roadmap Bar Chart Scatter Chart
æ	
Pivot	
Table	
em Views	
Details	
pecial Views	
A lich Text	
Editable Attributes	
Landare Prendated	

2. There are two style options available for Details View, 'Form' & 'Accordion'. Select which style you'd like for your view. (Examples of each can be found at the end of this page). By default your style is set to form. To change go to the view Customization tab and select 'Form Style'

	ole Attributes Item Display Style							^ *
**	Attribute and and and and and and and and and an				×	•	Editable	×
	Display name							
	Communities					Ŧ		
	Click Behavior None	~	View			Ŧ		
	Tooltip Attribute name				×	*		
	Reduced Display Style Setting Show text (2) Show thumbnail (2)	× •	Minimal Display Style Show text	Setting Show thumbnail (2)	×	•		
Add	Display Property							

- 3. You now need to select your Display Attributes. These are the Attributes you want to have in your Details View
 - a. Generic Attributes are Properties that are in all Object Types.

₹Filter	
Name	-
Description	
Creator	
Created Date	
Last Updating User	

- b. If you want to display Attributes that are only of the Object Type you're creating your display view for. You can either select the Object Type manually or search for a specific term
- c. This will bring a list of Object Type specific Attributes. Below the example is for Business Terms

	₹Filter
ľ	Critical To Regulation
	Status
	Notes
D	Descriptive Example
	Class

4. To allow users to change the Attribute there is a check box labelled 'Editable'. Unselecting this box will lock the attribute



5. To restrict the Attribute to a Community, click the 'Communities' field. If you wish the Property to be viewed by all leave this field blank

▼ Filter	
Data Steward	
Data Usage Admin	
Data Governance Administrator	
General User	
Data Custodian	

- 6. You can now choose whether the Attribute has a Click Behaviour. There are 5 options:
 - i. Context:
 - ii. None: Nothing will happen when the Attribute is clicked
 - iii. Open In Panel: A side panel will pop out
 - iv. Navigate To: Redirected to a new page displaying the set view
 - v. Open In Dialogue: The set view pops up in a box in the centre of the screen

	Context
D	None
	Open In Panel
	Navigate To
	Open in Dialogue

vi. Open In Panel, Navigate To & Open In Dialogue require you to set a View to navigate to. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view. The most common choice is 'Default View For Type'.

₹Filter	
🔁 Default View For Type	
- 🜐 Business Term	
🜐 Business Term View	
OT_Test Object_DG_GENERAL	
OT_Test Object_DG_TABS	+

- 7. Selecting a Tooltip Attribute allows users to select which attribute to display on hover, by default, this is set to name
- 8. To add additional Attributes, click 'Add Display Property' and repeat from Step 3
- 9. Once you have added all the Attributes you wish to display click 'Save'

Form style 'Details View'

	Cargo System ication component							2153729		1
DETAILS	FUNCTIONALITY	ASSESSMENT	CAPABILITY	IMPACT	TECHNOLOGY	DATA	COSTS	PROJECTS	RELA	TIONS
Name										
Air Cargo S	ystem									
Description										
	any property carried	or to be carried in	an aircraft. Air ca	argo compris	es air freight, air ei	press and	d airmail			
Air cargo is	any property carried	or to be carried in	an aircraft. Air ca	argo compris	es air freight, air e	cpress and	d airmail			
ink										

Accordion style 'Details View'

	Cargo System							2153729	Z	!
DETAILS	FUNCTIONALITY	ASSESSMENT	CAPABILITY	IMPACT	TECHNOLOGY	DATA	COSTS	PROJECTS	RELA	TIONSH
Name		Air Cargo S	System							~
Descri	ption	Air cargo i	s any property c	arried or to b	e carried in an airc	raft. Air ca	irgo compri	ises air freight, a	ir exj	~
Link										^
Link										

Input Style

In Details Views you can select from 4 different Input Styles; Default, Box, Solo & Outline.

Default

Preview

Box

Preview

Solo

Preview

Outline

Preview

To choose a style for your Details View simply go the 'Customisation' Tab and then 'Form Style'.

CONFIGURATION	CUSTOMIZATION	
Styling		~
Actions		~
Form Style		^
Style Form		*
Default		
Box		
Solo		
Outline		

Rich Text View

How Do I Create a Rich Text View?

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Before starting you must read and follow the instructions in the *New View* help page.

1. Select 'Rich Text' from Item Views.

Business Terms Rich Text	
Name Business Terms	Icon Color
Description Business Terms Information	
Display name	
Default for Data Governance	
Communities	
Type Configuration	
Layout Views	
Columns Rows Accordion Tabs	
Collection Views	_
Diagram Roadmap Scatter Chart Bar Chart Tree List HIII OD HIII List Kanban Count Table	Word
Item Views	
Details	
Special Views	
A Rich Text	

2. You will then be provided with a Rich Text Editor allowing you to format your text as well as insert pictures, links and tables.



3. Once you have finished click Save.

Conditional Views

How Do I Create a Conditional View?

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Conditional Views are Views which can be set to only appear once a certain criterion is met. e.g. If a Business Term is marked as 'Confidential' an extra tab will appear.

To implement a Conditional View is incredibly simple, all that is required is;

Create the view you wish to display, then Create a filter based on the criteria required

- 1. Create & Configure the View you wish to appear as your Conditional View
- 2. In a Layout View add the View you wish to appear as normal

	OT_Application component_DG_TABS Tabs					
Views						^
	OT_Application component_DG_DETAI	\times	Ŧ			×
	Display Condition		Ŧ	Specific Context Relationship	Ŧ	
	Take Context From Views Above This Layout		Ŧ	Only Render With Context		
	et OT_Application Component_ Functional.	×	•			×
	Display Condition		Ŧ	Specific Context Relationship	*	
	Take Context From Views Above This Layout		•	Only Render With Context		
**	View OT_Application component_DG_Asses	×	٣			×
	Display Condition		*	Specific Context Relationship	*	
	Take Context From Views Above This Layout		Ŧ	Only Render With Context		
	View OT_Application component_DG_Capabj#.	×	Ŧ			×
	Display Condition		Ŧ	Specific Context Relationship	*	
	Take Context From Views Above This Layout		.	Only Render With Context		
**	View et OT_ApplicationComponent_ImpactDgrp*	×	*			×
	Display Condition		Ŧ	Specific Context Relationship	*	
	Take Context From Views Above This Layout		*	Only Render With Context		
	View OT_Application component_DG_Techngk	×	Ŧ			×
	Display Condition		*	Specific Context Relationship	Ŧ	
	Take Context From Views Above This Layout		Ŧ	Only Render With Context		
DELETE	View RESET USER LAYOUTS			DUPLI	CATE VIEW	SAVE

3. Click on the 'Display Condition' input and select either a pre-defined filter or create one using the '+' button.



Layout

Columns View

How Do I Create a Columns View

Before starting you must read and follow the instructions in the *New View* help page.

The following page details how to create a Column View. You can use a Column View to contain other views such as a List View or a Count View. Below is an example of a View broken into Columns.

test_column_view			/
+ Add View In test, actions, where	+ Add View In the Conform, view	+ Add View to twill, column, slive	+ Add View In 1985, collectro, ulrew

1. Select 'Columns' from Layout Views.

Name Applications			Icon	Color
Description A 2 column view that displays a list of all applications a	and the default view for type			
Display name				
Pefault for erwin EA Agile v3				
Communities				
View Type Columns				`
Columns Configuration	Style			
View Type Columns Columns Configuration Number of Columns 2 Column 1 Size	Style Static Fill container?	Resizeable		~
Columns Configuration Number of Columns 2	- Static	Resizeable		
Columns Configuration Number of Columns 2 Column 1 Size	Static Fill container?			
Columns Configuration Number of Columns 2 Column 1 State 300 Column 2 State	← Static Fill container?			

erwin EA Agile V3 – User Help Guide Views

- 2. You now need to set the number of columns you wish to have in your view and set their size
 - a. First click on Number of Columns and select a value (you are able to create up to 4)
 - b. Choose the size for each column (A value of 0 sizes automatically)

Number of Columns 2	Style Static	*
Column 1 Size 300	Resizeable	×
Column 2 Size 0	Resizeable	×

- c. If you wish to make your columns resizable check the box and select a Resize Method.
- 3. The last step is to enter the Views you wish to be displayed in your Columns. This is done in the Views section at the bottom of the panel. By pressing the 'Add View' you can select the amount of views needed (This will be the same number of Columns set in Step 2b)

Views					
	View	*	Take Context From Views In This Layout	*	×
	Specific Context Relationship	*	Only Render With Context		
	View	*	Take Context From Views In This Layout	*	×
	Specific Context Relationship	*	Only Render With Context		
Add V	liew				

a. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view.

Views	Filter	Take Context From		
	1	Views In This Layout	*	\times
	Default View For Type	Only Render With Context		
	E OT_Test Object_DG_GENERAL			
	E OT_Test Object_DG_TABS	Take Context From Views In This Layout	*	\times
	OT_Test Object_DG_DETAILS_LAYOUT	Only Render With Context		
	OT_Test Object_DG_COMMON_DETAILS			
Add V	lew			

- Select if the View requires taking context (For more on Context read the 'Context' help file).
 You can also select to render the view only with context. If context is not required select
 'None'. You can also set a Specific Context Relationship for the views
- c. Repeat Step 4 until you have the appropriate number of Views for your Columns
- 4. Click Save to finish.

How Do I Place a View in a Card?

This can only be done within a Column View.

Placing a view on a card is a great way to draw attention to a view within another view e.g. a table. You can also use cards to create a dashboard-style view.

							Z = 4
EXPERIMENTS IDEAS PROTOTYPES PROJECTS							
Welcome to our Design	Experiments						
Thinking area!	At Empathise Stage	At Define Stage	At Ideate Stage	0	At Prototype Stage	At Test Stage	at Decision Stage
Here you can start experiments based on problems you've identified. Within these experiments, you will create ideas which them all them prototypers. You will create ideas protatypes to provide a solution based appreach to solving your problem. You will move across our Kamban board through 5 Starges:	7 set of 18	1	4 oratis		3 out of 18	2 oxtof 18	1 activ
Empathize — With your users Define — Your users' needs, their problem, and your insights Ideate — By challenging assumptions and creating ideas	Experiments Report				Experiments Roadmap		
for innovative solutions Prototype – To start creating solutions	name	Stepe	oreatedAt		It takes too long to update our prices in branch		
Test – Solutions	11 takes too long to update our prices	+ Empathise	05/06/2019, 17:29 (BST)		Lack of integration between products		
Depending on the stage of your experiment you will be presented with a different set of questions and options. As	Lack of integration between	🙆 Test	30/05/2019, 07:35 (BST)	4	Our application estate ids too complex		
well as feedback, Ideas and Prototypes can be compared using our pairwise comparison, where visible click the compare icon to begin. Once you've chosen you're final	Our application estate ids too	Prototype	05/06/2019, 17:18 (BST)	4	Our branch colleagues have no visibility of total product		
prototype you can turn it into a fully fledged	Our branch colleagues have no	1 Empathise	05/06/2019, 17:33 (BST)	+	Cost Our competitors are beating		
Create an Experiment!	0ur competitors are beating us on	+ Empathise	05/06/2019, 17:30 (BST)	+	us on online sales		
	Our customer data is inconsistent	1 Empathise	05/06/2019, 17:08 (BST)	+	Our customer data is inconsistent across the organisation		
	Our customers are complaining	Q Ideate	05/06/2019, 17:13 (BST)		Our customers are complaining about our		
	Our network usage is close to	Y Decision	05/06/2019, 17:17 (BST)	4	Website performance Our network usage is close to		
A A	Our service calls response time is	D Prototype	05/06/2019, 17:16 (BST)		Capacity Our service calls response		
1 T	Our transport costs have gone up	💋 Define	05/06/2019, 17:15 (BST)	4	time is too high Our transport costs have gone	-	
		items per page: 10	▼ 1-10 of 18 C < Page: 1 = ▼	> >1	up significantly recently		
22 🕂					test99		
					There has been a sharp increase in customer complaints regarding product defects		
					We can not quickly assess the impact of failure of our systems		

An example of using a card view to create a dashboard

- 1. In the 'Columns Configuration' tab of a Columns View configuration panel select 'Card Style'
 - a. If you wish to hide the vertical border lines between cards select 'Hide Lines

CONFIGURATION CUSTOMIZATION		
View Type Colum	nns	~
Columns Configuration		^
Number of Columns 4	style Static	Ŧ
Column 1 Size 0	Fill container?	
Column 2 Size 0	Fill container?	
Column 3 Size 0	Fill container?	
Column 4 Size 0	Fill container?	
Card Style		
ilde Lines		
-		
Views		~

- 2. Now every View within each column will be displayed on a card
 - a. You will need to make sure the View that is displayed on a card has a different color background to the background colour of the View containing it.

Rows View

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How Do I Create a Rows View

Before starting you must read and follow the instructions in the *New View* help page.

The following page details how to create a Rows View. You can use a Row View to contain other views such as a Table View or Diagram. Below is an example of a View broken into Rows.

ŀ	st_row_view	1
	+ Add View to Inst.Leves.view	
	+ Add View to test_traw_stew	
	+ Add View to test_tree, silew	
	+ Add View to test_Lineview	

1. Select 'Rows' from Layout Views.

App Row	lications /s										
Name Applications									Icon	Color	
Description											
A 2 row view	that display	/s a list of all	applications a	ind the defa	ault view for ty	pe					
Display nan	ne										
Default for erw	in EA Agile v3										
Communities	S									,	Ŧ
CONFIGURA		JSTOMIZATI	ON								
/iew Type										^	~
ayout Views	5										
Tabs	Columns	Rows	Accordion								
ollection Vi	ews										
		۲	大	\equiv	1		AW	\bullet	11.	\mathcal{N}	
Table	Kanban	Nested List	Tree	List	Diagram	Count	Wordcloud	Roadmap	Bar Chart	Scatter Chart	
Pivot											
Table											
em Views											
=											
Details											

2. You now need to set the number of rows you wish to have in your view and set their size

- a. First click on Number of Rows and select a value (you are able to create up to 4)
- b. Choose the size for each Row (A value of 0 sizes automatically)

Number of Rows 2	*	
Row 1 Size 400	×	
Row 2 Size 0	×	

3. The last step is to enter the Views you wish to be displayed in your Rows. This is done in the Views section at the bottom of the panel. By pressing the 'Add View' you can select the amount of views needed (This will be the same number of Rows set in Step 3b)

	View	*	Take Context From Views In This Layout	*	×
	Specific Context Relationship	•	Only Render With Context		
	View	Ť	Take Context From Views In This Layout	*	×
	Specific Context Relationship	•	Only Render With Context		
Add \	liew				

a. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view

Views				
	≂ Filter	Take Context From Views In This Layout	*	×
	🜐 Default View For Type	Only Render With Context		
	OT_Test Object_DG_GENERAL			
	OT_Test Object_DG_TABS	Take Context From Views In This Layout	Ŧ	×
	OT_Test Object_DG_DETAILS_LAYOUT	Only Render With Context		
	OT_Test Object_DG_COMMON_DETAILS			
Add V	iew			

- Select if the View requires taking context (For more on Context read the 'Context' help file).
 You can also select to render the view only with context. If context is not required select
 'None'. You can also set a Specific Context Relationship for the views
- c. Repeat Step 4 until you have the appropriate number of Views for your Rows
- 4. Click Save to finish.

Tabs View

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How Do I Create a Tabs View

Before starting you must read and follow the instructions in the *New View* help page.

The following page details how to create a Tabs View. You can use a Tabs View to contain numerous other views, the views contained can be either Layout or Collection Views. Below is an example of a Tabs View.

Aptication compared	2103729
DETAILS FUNCTIONALITY ASSESSMENT CAPABILITY IMPACT TECHNOLOGY DATA COSTS PROJECTS RELATIONSHIPS DIAGRAMS ISSUES ROADMAP	
Norre Arc Corpo System	
Decorption	
Air corep is any property corried or to be carried in an annoted. Air cargo comprises air freight, air express and cirmuil	
Link	
General	~
Model	×
Hosting	~
People	v
Lifecycles	v
Usage	*
Costs & Action Plan	v
Support	v
Diagrams	~
Audit	~
# DR.FTE	🔁 DUPLICATE 🛛 SAVE

1. Select 'Tabs' from Layout Views

Name Application	IS								Icon	Color
Description A tab view	that displays	various view	rs which are al	related to	applications					
Display n	ame									
	win EA Agile v3	5								
ommunit	es									
CONFIGU		USTOMIZAT	1011							
		USTOMIZAT	ION							
iew Type										
ayout Vie										
Tabs	Columns Views	Rows	Accordion							
ollection			t	≣	1		AW	$\mathbf{\bullet}$	11.	\mathcal{N}
									Bar Chart	Scatter
Collection Table	Kanban	Nested List	Tree	List	Diagram	Count	Wordcloud	коадтар	Bar Chart	Chart
	Kanban			List	Diagram	Count	Wordcloud	Roadmap	Bar Chart	

 Next you need to select the Views you wish to be displayed in each of your Tabs. This is done in the Views section at the bottom of your new view panel. By pressing the 'Add View' you can add additional panels.

Views					
	View	*	Take Context From Views In This Layout	*	×
	Specific Context Relationship	Ť	Only Render With Context		
	View	Ŧ	Take Context From Views In This Layout	*	×
	Specific Context Relationship	•	Only Render With Context		
Add V	/iew				

a. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view.

Views				
::	⊽ Filter	Take Context From Views In This Layout	*	×
	🜐 Default View For Type	Only Render With Context		
	OT_Test Object_DG_GENERAL	Take Context From		
	OT_Test Object_DG_TABS	Views In This Layout	Ŧ	×
	OT_Test Object_DG_DETAILS_LAYOUT	Only Render With Context		
	OT_Test Object_DG_COMMON_DETAILS			
Add V	lew			

- Select if the View requires taking context (For more on Context read the *Context* help file).
 You can also select to render the view only with context. If context is not required select
 'None'. You can also set a Specific Context Relationship for the views
- c. Repeat Step 3 until you have included all of your Tabs
- 3. Click Save to finish.

How Do I Add a Tab to a Tab View?

Through the configuration mode

- 1. Go to the view you wish to add a tab to
- 2. Click on the pen icon in the top right to enter configuration mode

Aaster	r											
. /	←G10_BG											
0	Business Glossary											
0	BROWSE TERMS BY GLOSSARY	BROWSE ALL TERMS	BROWSE TERMS BY CATEGORY	BUSINESS TERMS TABLE	ADRONYMS	REFERENCE DATA	DIAGRAMS	REPORTS	+ Add View to G10_BG			

3. In a Tab View you will see a button 'Add View to *view name*', click on that button to Create a new tab.

Add View to The Application		
View		*
Take Context From Views In This Layout		•
Specific Context Relationship		*
Only Render With Context		
	CANCEL	ADD

4. Click in the View field to either select a View or click the blue + button to create a new view (For more on how to create a new view please visit the *New View* help file)



- 5. Once you have selected your view you need to select if it requires context
- 6. Finally, click 'ADD' in the bottom right corner of the panel to add your view

Through the configuration panel of the Tab View

1. When in the configuration panel for a Tab View scroll down to Views.

	Action					
	Action					
two						
=	G_BG_Glossary_BusinessTerm	×	*	None	*	×
	Specific Context Relationship			Only Render With Context		
	G_BG_BusinessTerm_Browser	×	÷	Take Context From None		×
	Specific Context Relationship		÷	Dnly Render With Context		
	G_BG_Categories	×		Take Context From None	-	×
	Specific Context Relationship		÷	Drily Render With Context		
==	🔠 G_BG_BusinessTerm_Table 🧪	×	÷	Take Context From None		×
	Specific Context Relationship		÷	Dnly Render With Context		
=	G_BG_Glossary_Acronym_Browser	×	÷	Take Contact From None	-	×
	Specific Context Relationship		÷	Only Render With Context		
	🚯 G_RD 🧪	×		Take Context From None	-	×
	Specific Context Relationship			Only Render With Context		
	G_BG_Glossary_BusinessTermRelationpt.	×	÷	Take Context From None	-	×
	Specific Context Relationship		÷	Dniy Render With Context		
==	G_BG_Reports	×	×	Take Context From Views Above This Layout		×
	Specific Context Relationship		×	Only Render With Context		
Ndd \	New					

- 2. Click on the blue 'Add View' button to bring up a new blank view form
- Click in the View field of the new form to either select a View or click the blue + button to create a new view (For more on how to create a new view please visit the *New View* help file)

Add View to The Application	
⇒Filter	
Default View For Type	
E OT_Test Object_DG_GENERAL	
E OT_Test Object_DG_TABS	
OT_Test Object_DG_DETAILS_LAYOUT	
OT_Test Object_DG_COMMON_DETAILS	+
	CANCEL ADD

- 4. Once you have selected your view you need to select if it requires context
- 5. Once you have finished adding your view click the blue 'Save' button in the bottom right corner of the screen.

Accordion View

.

How do I Create an Accordion View?

Before starting you must read and follow the instructions in the *New View* help page.

The following page details how to create an Accordian View. You can use an Accordian View to contain other views in an expandable panel. Below is an example of an Accordian View that contains multiple Details Views.

General	
Roles	
Thesaurus	
synonym for	
. Preferred Term ue	
as shortened form of	
Structure	
Reference Data	
Security	•
System Usage	
Process Usage	
Data Dictionary	
Business Rules	
Audit	

1. Select 'Accordion' from Layout Views.

Applications Accordion	
Name Applications	Icon Color
Description An accordion view for applications	
Display name	
Default for erwin EA Agile v3	
Communities	Ť
CONFIGURATION CUSTOMIZATION	
View Type	^
Layout Views Tabs Columns Rows Accordion	

2. Next you need to select the Views you wish to be displayed in each of your collapsible panels. This is done in the Views section at the bottom of your new view panel. By pressing the 'Add View' you can add additional panels. The most common use of the Accordion View is using the Details layout (For more information on how to create a Details view please visit the *Details View* help file

Views					
	View	*	Take Context From Views In This Layout	*	×
	Specific Context Relationship	*	Only Render With Context		
	View	Ť	Take Context From Views In This Layout	-	×
	Specific Context Relationship	•	Only Render With Context		
Add V	liew				

a. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view

÷	⇒ Filter	Take Context From Views In This Layout	÷	×
	🜐 Default View For Type	Only Render With Context		
	OT_Test Object_DG_GENERAL			
	E OT_Test Object_DG_TABS	Take Context From Views In This Layout	•	\times
	OT_Test Object_DG_DETAILS_LAYOUT	Only Render With Context		
	OT_Test Object_DG_COMMON_DETAILS			
Add Vi	iew			

- Select if the View requires taking context (For more on Context read the *Context* help file).
 You can also select to render the view only with context. If context is not required select
 'None'. You can also set a Specific Context Relationship for the views
- c. Repeat Step 4 until you have included all of your panels

3. Click Save to finish.

Collection Views

Kanban View

How Do I Create a Kanban?

Kanban boards are the visual storyboard for a process or workflow. They represent the journey and the objects within that journey. Objects are represented as cards on the board. Objects may be moved from one stage to another by dragging.

Q Search							
< Unassigned B	€ Proposed 2	< In Development 1	¢ Live 4	< Phasing Out	4 c Retired	0 € Proof of Concept	0 < Filet
Enance System	Crew Management System	Business Processing System	Airport Management	Air Cargo System			
name: Pinanoe System	name: Crew Management System	name: Business Processing System	name: Airport Management System	name: Air Cargo System			
Flight Operation System	CyberCheck	opinin	Central Reservation System	Boarding Control			
name: Flight Operation System	name: CyberCheck		arre: Dentral Reservation System	name: Bearding Control			
1 HR Centre			CheckID	CRM System			
name: HR Centre			name: theoldD	name: CRM System			
HR System			ChekDesk	PrintPass	_		
name: HR System			name: ChekDesk	name: PrintPass			
Maintenance & Engineering System					_		
nome: Maintenance & Engineering							
System							
My new proposed app							
nome: My new proposed app							
Pricing & Revenue							
Management							
Management System							
Sales & Marketing System							
name: Sales & Marketing System							
Pof	ara atarting	vou must r	and and fal	low the in	structions in	the Now I	liou holp n
	JE SIGHTING	you must r	zau anu iui		รถ นิธิสินที่ 11		

- Before starting you must read and follow the instructions in the *New View* help page.
- 1. Select 'Kanban' from Collection Views.

E Aj	oplication St anban	atus Kanb	an							
Name Application	n Status Kanb	an							Icon	Color
Descripti	on									
Display nam Application										
Default for e	rwin EA Agile v3									
Communit	ies									*
CONFIGU	RATION CI	JSTOMIZAT	ION							
View Typ	e									^
Layout Vie	Columns	Rows	Accordion							
Collection	Views									
Table	Kanban	Nested List	Tree	List	Diagram	Count	Wordcloud	Roadmap	Bar Chart	Scatter Chart

erwin EA Agile V3 - User Help Guide Views 2. Add a Filter so your Kanban only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter please read the *Filters* help file.

Data Source	^
Source of Data Filter	-
₹Filter applications	
Applications realized by Out of Support Technology	
Capability - Supported By Applications realized by Software Out of Support	
My Applications - Live	
[EA] My Applications	
[EA] Applications	+

3. You will then need to set the X & Y attribute for your Kanban View

Groupings	^
X Attribute	
X Grouping Attribute	*
Display name	
Communities	*
Click Behavior None View	Ŧ
Tooltip Attribute	× •
Disable Sorting	~
Disable Collapsing	
Y Attribute	
Y Grouping Attribute	*
Display name	
Communities	*
None View	Ŧ
Tooltip Attribute	× •
Disable Sorting	
Disable Collapsing	
a. Select your X axis grouping attribute, for this example we will use the Status Attribute of Object Type 'Business Term'



This will bring a list of Object Type specific Attributes. Below the example is for Business Terms. For general Attributes click 'Generic Attributes'

7 Filter
Next standard review date
Retire date
Lifecycle status
Lifecycle - Proposed
Lifecycle - In Development

b. To restrict the Attribute to a Community, click the 'Communities' field. If you wish the Attribute to be viewed by all leave this field blank

₹ Filter	
Data Steward	
Data Usage Admin	
Data Governance Administrator	
General User	
Data Custodian	

- c. You can now choose whether the Icon has a Click Behaviour. There are 5 options:
 - i. Context:
 - ii. None: Nothing will happen when the Property is clicked
 - iii. Open In Panel: A side panel will pop out
 - iv. Navigate To: Redirected to a new page displaying the set view
 - v. Open In Dialogue: The set view pops up in a box in the centre of the screen
- d. Open In Panel, Navigate To & Open In Dialogue require you to set a View to navigate to. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view. The most common choice is 'Default View For Type'

1	Filter	
	🜐 Default View For Type	
-	🜐 Business Term	
	Business Term View	
	OT_Test Object_DG_GENERAL	
	OT_Test Object_DG_TABS +	

- e. Repeat for Step 4a 4d for your Y axis
- 4. Next you will need to select which Attributes are displayed within your Kanban cards.
 - a. Generic Attributes are Attributes that are in all Object Types

≂Filter	
Name	
Description	
Creator	
Created Date	
Last Updating User	
Communities	Ψ

- b. If you want to display Attributes that are only of the Object Type you're creating your display view for. You can either select the Object Type manually or search for a specific term
- c. This will bring a list of Object Type specific Attributes. Below the example is for Business Terms
- 5. To allow users to change the Attribute there is a checkbox labeled 'Editable'. Unselecting this box will lock the Property



- 6. To restrict the Attribute to a Community, click the 'Communities' field. If you wish the Property to be viewed by all leave this field blank
- 7. You can now choose whether the Attribute has a Click Behaviour. As in Step 4c you have 5 options. If your selection requires a View select from a list or create your own (Step 4d)
- To add additional Attributes, click 'Add Display Property' and repeat from Step 4
 - 8. Once you have finished configuring your Kanban View click 'Save'.

List View

How Do I Create a List View?

An example of a list view displaying Application Components alongside their default view. Lists can display any Objects within your metamodel and customized with various click behaviors.

BY NAME BY CAPABILITY VENDOR MANAGEMENT	ASSESSMENT RESULTS APPLICATIONS LIST APPLICATION COST APPLICATION COST BAR CHART		
v	Air Cargo System Application component	2153729	2 📕
Air Cargo System	DETAILS FUNCTIONALITY ASSESSMENT CAPABILITY IMPACT TECHNOLOGY DATA COSTS PROJECTS RELATIONSHIPS DIAGRAMS	ISSUES ROADM	AP
Airport Management System	Name Air Cargo System		
Boarding Control	Desception Air cargo is any property carried or to be carried in an alrcraft. Air cargo comprises air freight, air express and airmail		
Business Processing System	Link		
Central Reservation System	General		×
CheckiD	Model		Ý
ChekDesk	People		~
Crew Management System	Lifecycles		Ý
CRM System	Usage		~
	Costs & Action Plan		~
CyberCheck	Support		~
Finance System	Diagrams		~
Flight Operation System	Audit		~
HR Centre			
E HR System			
Maintenance & Engineering System			
	■ DELETE	E DUPLICATE	B SAVE

- Before starting you must read and follow the instructions in the *New View* help page.
 - 1. Select 'List' from Collection Views

Descriptior									H ~	
	ı									
Display name	1									
Default for erw	rin EA Agile v3									
Communitie	S									
CONFIGUR	ATION CU	STOMIZATI	ON							
/iew Type			-							,
ayout View	s									
Tabs	Columns	Rows	Accordion							
	iews									
Collection V										
Collection V		۲	t	≣	Diagram	0	Wordcloud	Ø	ılı	\sim

2. Add a Filter so your list only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter please visit the *Filters* help file

Data Source	^
Source of Data Filter	~
⊽ Filter applications	
Applications realized by Out of Support Technology	
Capability - Supported By Applications realized by Software Out of Support	
My Applications - Live	
[EA] My Applications	
[EA] Applications	- (

- 3. Next you will need to select which Attributes are displayed within your list.
 - a. Generic Attributes are Attributes that are in all Object Types

₹Filter	
Name	
Description	
Creator	
Created Date	
Last Updating User	
Communities	

b. If you want to display Attributes that are only of the Object Type you're creating your display view for. You can either select the Object Type manually or search for a specific term

erwin Application		
Application component		
Application collaboration		
O Application interface		
Application function		

c. This will bring a list of Object Type specific Attributes. Below the example is for Business Terms

Filter	
Next standard review date	
Retire date	
Lifecycle status	
Lifecycle - Proposed	
Lifecycle - In Development	

4. To allow users to change the Attribute there is a check box labelled 'Editable'. Unselecting this box will lock the Attribute



- 5. To restrict the Attribute to a Community, click the 'Communities' field. If you wish the Attribute to be viewed by all leave this field blank
- 6. You can now choose whether the Icon has a Click Behaviour. There are 5 options:
 - i. Context:
 - ii. None: Nothing will happen when the Attribute is clicked
 - iii. Open In Panel: A side panel will pop out
 - iv. Navigate To: Redirected to a new page displaying the set view
 - v. Open In Dialogue: The set view pops up in a box in the centre of the screen

Open In Panel, Navigate To & Open In Dialogue require you to set a View to navigate to. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view. The most common choice is 'Default View For Type'



- 7. To add additional Attributes, click 'Add Display Attribute' and repeat from Step 5
- 8. To add alphabetical letters on the side of your list tick 'Alpha Group'



9. Once you have finished click 'Save'.

Roadmap View

How Do I Create a Roadmap?

Roadmaps provide a mechanism to show any concept over a time period. Most Enterprise Architect (EA) concepts will have a time dimension.

Aglie v3 Q Search																							/ #	. 🌘
Boarding Control																								
CheckID																								
ChekDesk																								
CyberCheck																								
CheckID ChekDesk CyberCheck PrintPass										_														
	109	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032 2

Before starting you must read and follow the instructions in the *New View* help page.

1. Select 'Roadmap' from Collection Views

Application Roadm Roadmap	nap View							
Name Application Roadmap View							Icon	Color
Description								
Display name Application Roadmap								
Default for erwin EA Agile v3								
Communities								-
CONFIGURATION CUSTO	MIZATION							
View Type								^
Layout Views								
Tabs Columns R	ows Accordion							
Collection Views								_
Table Kanban Ne	ested Tree	List	Diagram	Count	Wordcloud	Roadmap	Bar Chart	Scatter
	List		-					Chart
Pivot								
Table Item Views								
=								
Details								

2. Add a Filter so your Roadmap only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter, please visit the *Filters* help file)

Data Source	^
Source of Data Filter	÷
⇒ Filter applications	
Applications realized by Out of Support Technology	
Capability - Supported By Applications realized by Software Out of Support	
My Applications - Live	
[EA] My Applications	
[EA] Applications	(†)

- 3. Next, you will need to select your Date Attributes for your Roadmap View.
 - a. First, select your element type.

Date Attributes			^
Roadmap Configuration Attributes			
Element type		Editable	
Application component	*		×

b. Then, select the Source Attributes for your date or date range

Start date source attribute Lifecycle	*	Date time range position Start	*
End date source attribute (optional) Lifecycle	× •	Date time range position End	-
Add Element Type			

- 4. If you wish to add another Element Type click 'Add Element Type' and repeat step 4
- 5. Once you have finished click 'Save' in the bottom right corner

How Do I Add a Grouping Attribute

1. Once you've configured your Roadmap view go to the customization tab and open the 'Grouping' accordion.

CONFIGURATION CUSTOMIZATION	
Styling	~
Actions	~
Grouping	^
One Element Per Line	
Sync Timelines Single Timeline	
Show Divider Between Roadmaps	
Grouping Attribute	× •
Display name	
Communities	•
Click Behavior	
None View View Disable Sorting Disable Collapsing	
Overlay Filters / Heatmaps	~
Click Behavior	~
Workspaces	~

2. Select the Attribute you wish to group by

Grouping Attribute O Associated Data Stores		× •
Associated Data Stores		~ *
New Journey		
Display name		
Communities		
Click Behavior		
None	 View 	

Roadmap Styling

There are several styling options available for our Roadmap View.

You can choose to display elements one-per-line

Grouping	^
One Element Per Line	

Tick the box and Save to change the style



If you've chosen to group your roadmap by an Attribute you can Sync timelines for easier navigation. You can also choose to have one master timeline rather than a timeline per-group



Count View

How Do I Create a Counts View?

An example of count views being used in a dashboard layout. Count Views can be defined using filters.

EA Agio va	Q Search					≥ ≡ ♦	۲
*	MY CAPABILITIES TABLE MY ISSUES CAPAE	BILITY MODEL					
=	Capabilities With Issues	Capabilitie	s With Low Maturity Level	Critical Capabilities With Issues		Low Performing Critical Capabilities	
€ ⊼	1 extor5		1 out of 5	1 0x1012		1 00:012	
а Н			<u> </u>				×
B	name name	Business Importance	Business capability performance	Known Issues	Maturity Level	Overall Porformance	
=	🗆 👍 Cerrying	Medium (3)	Consistently delivers whats r	needed 💿	4 - Quantitively M	fanaged 🛛 🛑 High 🕲	
	🗌 👍 Fleet Planning	Medium (3)	Is a recognized leader 😒		5 - Optimized 🕲	High 🕲	
	🗆 🍓 Forwarding	Medium (3)	Consistently delivers whats r	needed (2)	3 - Defined 🕲	edium 🕲	
	🗌 👍 Network Management	Important ©	Is a recognized leader 😒		4 - Quantitively M	fanaged 🛛 🛑 High 🕲	
	Passenger Service	Critical (3)	Strong pain point 🕲	😐 Passengers Delays	🛑 1 - Initial 💿	Low 😒	

- Before starting you must read and follow the instructions in the *New View* help page.
 - 1. Select 'Count' from Collection Views

									lcon	Color
ame										
										-
escription										
splay name										
efault for Data 0	Governance									
ommunities										-
e Configurati	ion									
ayout Views										
	_									
			L							
olumns	Rows	Accordion	Tabs							
ollection Viev	VS									
•										
~ '	Q	••	11.	ス					AW	
iagram Ro	oadmap	Scatter	Bar Chart	Tree	List	Kanban	Count	Table	Word	

2. Add a Filter for the Object Type Instances you wish to count. You can either select a filter or create a new one (For more on how to create a filter, please visit the *Filters* help file)

Data Source	^
Source of Data	
Filter	*
⊽Filter	
applications	
Applications realized by Out of Support Technology	
Capability - Supported By Applications realized by Software Out of Support	
My Applications - Live	
[EA] My Applications	_
[EA] Applications	+ -

- Before starting you must read and follow the instructions in the *New View* help page.
 - 3. You can either set to display your Count as an Absolute or a Fraction (labeled Percentage). This is selected in the Interval Type Select menu
 - 4. If you wish to display your Count as an absolute leave the Denominator (Filter) blank

If you wish to display it with a Denominator choose or create a Filter

Denominator (Filter)	*
Interval Type Select Percentage	*
Add Interval	

- 5. You can also set Intervals to change the color of your Count and display an Icon when it hits a Value
 - i. Click 'Add Interval'
 - ii. Select your Interval Type, you can choose to have Intervals at an Absolute value or a Percent value
 - iii. This will bring up a blank Interval to form
 - iv. Set the Value, Icon & Color for your Interval
 - v. If you wish to add another Interval click 'Add Interval'

Add Interval				
Interval to		lcon	Color	
0	٢	•		×

6. Once you have finished click 'Save' in the bottom right corner.

Tree View

How Do I Create a Tree View?

Tree Views are used to visualize data hierarchically with each branch showing an objects related items. The example below shows sub-capabilities as a branch of a parent capability.

CAPABILITIES CAPABILITY INCREM	IENTS	UNADDRESSED TACTICS ALL OBJECTS								
DIAGRAMS CAPABILITIES	AGRAMS CAPABILITIES									
Critical Capabilities 😒	*	Cargo Capability	2153741	Z	0 📕					
▶ 👍 Cargo	+	DETAILS ASSESSMENT PROCESSES APPLICATIONS INCREMENTS TRENDS PROJECTS RELATIONSHIPS								
👻 🌐 Flight Ops	+ [Name								
 Grew Management 	+	Cargo								
> 🔒 Flight Support	+									
 Operational Flight Pl 	+	Description								
Operations Control	+									
Ground Ops	+	General			~					
 Anarketing & Customer Care 	+	Costs			~					
▶	+	Applications			~					
 Product 	+									
▶	+	Audit			~					
🕨 付 Sales	+									
> 🔒 Support	+									

Before starting you must read and follow the instructions in the *New View* help page.

1. Select 'Tree' from Collection Views

Name	Icon Color
Description	
Display name	
Default for Data Governance	
tommunities	-
ayout Views Columns Rows Accordion Tabs	
	D ::: A ^{<i>v</i>}

erwin EA Agile V3 – User Help Guide Views

- 2. Tree Views can work with either Filters or Journeys. We recommend using Journeys to get the most out of this view type.
- To create a Journey to define the structure of your tree please read the *Journeys* help file for guidance on how to create one

Context Capability		× •
MEW PATH	× Path Type step	Ŧ
	Label	
	Relationship Type	Ŧ
	Object Type	Ÿ
	Ignore Results	
Block Filter Inheritance		

3. Once you have defined your Journey, select your name attributes

lt Item Display Style					
Attribute			×	•	Editable
Display name					
Communities				•	
Click Behavior None	*	View		Ŧ	
Tooltip Attribute name			×	•	
Reduced Display Style Setting Show text & Show thumbnail &	× •	Minimal Display Style Setting Show text & Show thumbnail &	×	•	

4. Once you have finished configuring your Tree View click 'Save'.

Table View

How Do I Create a Table View?

An example of a Table View displaying related objects.

CAPABILITIE	ES CAPABILITY INCREMENTS UNADDRESSED TACTICS ALL O	BJECTS				
Support:	Supports High Priority Requirement					
nan	ne	Parent capability	Requirements	Delivered By Work Packagea		
- 3	Allocate RFID FF cards to client account	💼 Customer Relationship Management 🐵	Airport RFID Frequent Fiyer Card ③	😑 Chixipass 🕲		
	Allow flyers to check themselves in via a terminal	Passenger Service Ø	Ability to self check-in (3)	Self Service Check In Terminals (2)		
	Automated Baggage Routing	🔒 Baggage Management 🛞		Turbo Baggage Management System (3)		
	Car Parking Loyalty Schema	e Airport Infrastructure	Manage parking preferences in advance ③	😑 Car Parking Phase 2 💿		
- 3	Connect boarding pass to RFID FF cards	Passenger Service ② …	Airport RFID Frequent Flyer Card ③	😑 Chixipass 🕲		
	Connect RFID scanners to check in systems	Passenger Service (2)	Airport RFID Frequent Fiyer Card (3)	😑 Chixipass 🕲		
- 1	Install RFID scanners in terminals	Airport Infrastructure @	Airport RFID Frequent Flyer Card	😑 Chixipass 🕲		
- 3	Manufacture RFID FF cards	Airport Infrastructure (2)	Airport RFID Frequent Fiyer Card ③	😑 Chixipass 🕲		
	Taxi Management System	🔒 Ground Ops 🐵	Improve access to taxis ③	😑 Call a Cab 💿		
	Update Flight Control to support new technology	🔒 Operational Flight Planning 🕲		😑 Traffic Control System Upgrade 💿		

An example of a Table View displaying various object attributes

neme	Business Importance	Business capability performance	Known Isames	Maturity Level	Overall Performance
🗆 🔒 Carrying	Medium 💿	Consistently delivers whats nee	eded 🕲	4 - Quantitively Managed 🕲	High 🛛
🗆 🔒 Fleet Planning	Medium 💿	Is a recognized leader 🕲		5 - Optimized 💿	High 🛛
🗆 🔒 Forwarding	Medium (2)	Consistently delivers whats nee	eded 🕲	3 - Defined 🕲	edium 🕲
🗌 / Nitwork Management	Important (2)	Is a recognized leader 🕲		4 - Quantitively Managed 🕲	High 🕲
Passenger Service	Critical (3)	Strong pain point 🕲	Passengers Delays	🛑 1 - Initial 🛞	Low 🕲

Before starting you must read and follow the instructions in the *New View* help page.

1. Select 'Table' from Collection Views.

Name							Icon	Color
Description								
isplay name								
fault for Data Governa	ince							
ommunities								
e Configuration								
ayout Views								
iyout Views								
olumns Rows		Tabs						
ayout Views iolumns Rows								
ayout Views Columns Rows		Tabs	•					
			ţ	Kanban	0	Table	Word	

 Filters, Journeys & Queries can be used in Tables. Filters will return your Object in column A and your selected display attributes in the remaining columns. Journeys will display across the columns but with no additional properties & Queries can return a journey across the metamodel with properties of objects at each step.

For more on how to create a filter or a Journey please visit the Filters, Journeys or Queries

[Data Source	^
	Source of Data Filter	÷
	▼ Filter applications	
	Applications realized by Out of Support Technology	
	Capability - Supported By Applications realized by Software Out of Support	
	My Applications - Live	
	[EA] My Applications	
-	[EA] Applications	+

- 3. You will then need to select which Attributes are displayed in the columns of your Table
 - a. Generic Attributes are Attributes that are in all Object Types

⇒Filter	
Name	
Description	
Creator	
Created Date	
Last Updating User	~

b. If you want to display Attributes that are only of the Object Type you're creating your display view for. You can either select the Object Type manually or search for a specific term

≂ Filter applic
erwin Application
Application component
O Application collaboration
Application interface
Application function

c. This will bring a list of Object Type specific Attributes. Below the example is for Application Component

1	≂ Filter
	Critical To Regulation
	Status
	Notes
D	Descriptive Example
	Class

4. To allow users to change the Attribute there is a checkbox labeled 'Editable'. Unselecting this box will lock the attribute



5. To restrict the Attribute to a Community, click the 'Communities' field. If you wish the Property to be viewed by all leave this field blank

▼Filter		
Data	Steward	
Data	Usage Admin	
Data	Governance Administrator	
Gene	ral User	
Data	Custodian	

- 6. You can now choose whether the Attribute has a Click Behaviour. There are 5 options:
 - i. Context:
 - ii. None: Nothing will happen when the Attribute is clicked
 - iii. Open In Panel: A side panel will pop out
 - iv. Navigate To: Redirected to a new page displaying the set view
 - v. Open In Dialogue: The set view pops up in a box in the centre of the screen

	Context	
D	None	
	Open In Panel	
	Navigate To	
	Open in Dialogue	

Open In Panel, Navigate To & Open In Dialogue require you to set a View to navigate to. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view. The most common choice is 'Default View For Type'

≂Filter
EDefault View For Type
Business Term
Business Term View
OT_Test Object_DG_GENERAL
OT_Test Object_DG_TABS +

- 7. To add additional Attributes, click 'Add Display Property' and repeat from Step 4
- 8. Once you have finished configuring your Table View click 'Save'

Scatter Chart

How Do I Create a Scatter Chart?

(NAME	BY CAPABILITY	VENDOR MANAGEMENT	ASSESSMENT RESULTS	APPLICATIONS LIST	APPLICATION COST	APPLICATION CO	ST BAR CHART		
,200,000	Total Cost	0			0			0	
.000,000 -			0			0	0	•	0
800,000 -			0 0	8		0	0		
600,000 -	•		0						
100,000 -			•	C					
200,000 -									
0									Number of Users

- Before starting you must read and follow the instructions in the *New View* help page.
 - 1. Select 'Scatter Chart' from Collection Views.

hypecycle_c Scatter Chai	rt rt								
Name hypecycle_chart								Icon	Color
Description									
Display name									
Default for erwin EA Agile	v3								
Communities									*
CONFIGURATION	CUSTOMIZAT	ION							
View Type Layout Views Tabs	Rows	Accordion							^
Collection Views					_		_		
Table Kanban	Nested List	1 Tree	List	Diagram	Count	Wordcloud R	oadmap	Bar Chart	Scatter Chart
Pivot									
Table Item Views									
=									
Details Special Views									
A Rich Text									

2. Add a Filter so your list only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter please visit the *Filters* help file)

Data Source	^
Source of Data Filter	÷
≂ Filter applications	
Applications realized by Out of Support Technology	
Capability - Supported By Applications realized by Software Out of Support	
My Applications - Live	
[EA] My Applications	
[EA] Applications	(+)

3. Select your X and Y Axis Attributes (These can only be an integer attribute type)

Axes Configuration	^
X-axis attribute Hype Cycle	-
Y-axis attribute • Expectiations of Technology	*

4. Click 'Save'.

Stacked Bar Chart

How Do I Create a Stacked Bar Chart?



- Before starting you must read and follow the instructions in the *New View* help page.
 - 1. Select 'Bar Chart' from Collection Views

application_cost_bar Bar Chart	
Name application_cost_bar	Icon Color
Description	
Display name Application Cost Bar Chart	
Default for erwin EA Agile v3	
Communities	
CONFIGURATION CUSTOMIZATION	
View Type	^
Layout Views	
Tabs Columns Rows Accordion	
Collection Views	
ⅲ Ⅲ ◆ 大 三 人 ① ◎ ◆	
Table Kanban Nested Tree List Diagram Count Wordcloud Roadm List	nap Bar Chart Scatter Chart
Pivot	
Table	
Item Views	
Details	
Special Views	
A	
Rich Text	

2. Add a Filter so your list only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter please visit the *Filters* help file)

D	Data Source	^	
	ource of Data		
	inei	*	
1	Filter		
а	pplications		
Γ	Applications realized by Out of Support Technology		
	Capability - Supported By Applications realized by Software Out of Support		
	My Applications - Live		
	[EA] My Applications		
	[EA] Applications	+	H

3. Select your Display Attributes and their colors (These can only be an integer attribute type)

Displa	ay Attributes			^
**	Attribute Total Cost	Ŧ	Editable	×
* * * * * *	Attribute Support Cost	•	Editable	×
Add	Display Property			

4. Click 'Save'

Word Cloud

How Do I Create a Word Cloud View?



- Before starting you must read and follow the instructions in the *New View* help page.
 - 1. Select 'World Cloud' from the list of Collection Views

test_nested_ Wordcloud	layout								
- Horadicaa									
Name								lcon	Color
test_nested_layout								II ~	
Description									
Display name									
Applications									
Default for erwin EA Agile v	3								
Communities									*
CONFIGURATION C	USTOMIZAT	ION							
View Type									^
Layout Views									
Tabs Columns	Rows	Accordion							
Collection Views									
III III		Ĵ.	=	•					~
	\mathbf{v}		=				¥		~
Table Kanban	Nested List	Tree	List	Diagram	Count	Wordcloud	Roadmap	Bar Chart	Scatter Chart
	List								Chart
Ξ									
Pivot									
Table									
Item Views									
\equiv									
Details									
Special Views									
A									
Rich Text									

2. Add a Filter so your list only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter please visit the *Filters* help file)

Data Source	^
Source of Data Filter	Ŧ
⇒ Filter applications	
Applications realized by Out of Support Technology	
Capability - Supported By Applications realized by Software Out of Support	
My Applications - Live	
[EA] My Applications	
[EA] Applications	(-)

3. Select the Attribute you wish to analyze using the Word Cloud View

ttribu	utes						^
efaul	t Item Display Style						,
	Attribute eta description			×	•	Editable	>
	Display name						
	Communities				Ŧ		
	Click Behavior None	-	View		Ŧ		
	Tooltip Attribute name			×	Ŧ		
	Reduced Display Style Setting Show text S Show thumbnail S	× •	Minimal Display Style	×	Ŧ		

4. Click 'Save'

Pivot Tables

How Do I Create a Pivot Table?

The pivot table provides the ability to slice and dice your objects by their attributes. Attributes are simply dragged and dropped into the Table to create Row & Column headers.

Clicking on the drop-down arrow next to an attribute will allow you to filter by the values of the attribute:

able	\$													
Count $\uparrow \leftrightarrow$	Healt													
name -		Health Status	Excellent	Goo	ł	М	oderate	Poor	null					
		Lifecycle status	Phasing Out	In Development	Phasing Out	Live	Proposed	Live	Phasing Out	null	Totals			
ount 🗧	name													
	Air Cargo	System	1								1			
	Airport M	anagement System				1					1			
	Boarding	Control			1						1			
	Business	Processing System		1							1			
	CRM Syst	em			1						1			
	Central R	eservation System				1					1			
	CheckID							1			1			
	ChekDesk	ç				1					1			
	Crew Mar	nagement System					1				1			
	CyberChe						1				1			
	Finance S									1	1			
		eration System								1	1			
	HR Centre									1	1			
										1	1			
	HR Syster										1			
		nce & Engineering System								1				
	My new p	roposed app								1	1			
	Pricing &	Revenue Management System								1	1			
	PrintPass								1		1			
	Sales & N	farketing System								1	1			
		Totals	1	1	2	3	2	1	1	8	19			

Before starting you must read and follow the instructions in the *New View* help page.

1. Select 'Pivot Table' from the list of Collection Views

$\begin{array}{c} \label{eq:production_pivot} \\ \hline \begin{tabular}{lllllllllllllllllllllllllllllllllll$	Namo									lean	Color	
Description Deplet name Application Pivot Table Default for ervin EA Agie v3 Communities $\$ Communities $\$ Configuration Customization Configuration Customization Configuration Customization Table Columns $\$ Table $\$ The field $\$		on_pivot								Icon	Color	
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Image: Special Views	avout Vie	ws										
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Pivot Table Item Views Details Special Views	Collection	Views	Nested	t	List	Diagram		Wordcloud	Roadmap			
Table Item Views Details Special Views	Collection Table	Views	Nested	t	List	Diagram		Wordcloud	Roadmap			
Details Special Views	Table	Views	Nested	t	List	Diagram		Wordcloud	Roadmap			
Special Views	Table Pivot	Views	Nested	t	List	Diagram		Wordcloud	Roadmap			
Special Views	Table Pivot Table	Views Kanban	Nested	t	List	Diagram		Wordcloud	Roadmap			
Special Views	Table Pivot Table	Views Kanban	Nested	t	List	Diagram		Wordcloud	Roadmap			
	Table Pivot Table	Views Kanban	Nested	t	List	Diagram		Wordcloud	Roadmap			
•	Table	Views Kanban	Nested	t	List	Diagram		Wordcloud	Roadmap			
Δ	Collection Table	Views Kanban	Nested	t	List	Diagram		Wordcloud	Roadmap			
	Table Pivot Table Details	Views Kanban	Nested	t	List	Diagram		Wordcloud	Roadmap			

2. Add a Filter so your list only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter please visit the *Filters* help file)

[Data Source	^	
	Source of Data	Ŧ	
	≠Filter applications		
	Applications realized by Out of Support Technology		
	Capability - Supported By Applications realized by Software Out of Support		
	My Applications - Live		
	[EA] My Applications		
-	[EA] Applications	÷	F

ispia	y Attributes					/
fault	Item Display Style					
::	Attribute			× -	Editable	>
	Display name					
	Communities			*		
	Click Behavior					
	None	~	View	$\overline{\mathbf{v}}$		
	Tooltip Attribute					
	📦 name			× •		
	Reduced Display Style Setting		Minimal Display Style Setting			
	Show text 🕲	× •	Show text Show thumbnail	× •		
* *	Attribute			× -	Editable	2
	Display name					
	Communities			~		
	Click Behavior					
	None	-	View	~		
	Tooltip Attribute					
	name			\times -		
	Reduced Display Style Setting		Minimal Display Style Setting			
	Show text 😒 Show thumbnail 😒	× •	Show text 😒 Show thumbnail 😒	× -		
	Attribute				Editable	>
::	E Health Status			× -		1
	Display name					
	Communities			.		
	Click Behavior					
	None	~	View	$\overline{\mathbf{v}}$		
	Tooltip Attribute					
	 name 			× -		
	Reduced Display Style Setting		Minimal Display Style Setting			
	Show text Show thumbnail	× -	Show thumbnail 😣	× -		

3. Select Display Attributes for you to use in your Pivot Table

Nested List

How Do I Create a Nested List View?

Nested List Views are a great way to navigate through your metamodel in a list-style view



- Before starting you must read and follow the instructions in the *New View* help page.
 - 1. First, select 'Nested List' from the list of Collection Views

New View Tabs				
Name capability_nested_list				Icon Color
Description				
Display name Capabilities				
Default for erwin EA Agile v3				
Communities				v
CONFIGURATION CUSTOMIZ	ATION			
View Type				^
Layout Views				
Tabs Columns Rows Collection Views	Accordion			
Table Kanban Neste	d Tree List	Diagram Count	Wordcloud Roadmap	Bar Chart Scatter Chart
Pivot				
Table Item Views				
Details				
Special Views				
A Rich Text				

2. Now you will need to define your 'levels'. A level is each step through the metamodel, each level is powered by a filter

CONFIGURATION	CUSTOMIZATION	
View Type	Nested List	~
List Levels		^
+ Add Level		
Display Attribut	95	~

3. Click 'Add Level' and select a previously configured filter or create your own.

Add Level	
≂ Filter Capa	
Capabilities	,
High Perf Capability	
Capability - Supported By Applications realized by Software Out of S	Support
Capability - High Overall Performance	
Capability - Medium Overall Peformance	•

4. Repeat for all the levels you wish to have in your Nested List View.

List L	evels	^
۲	Capabilities	• •
۲	[EA] Applications	•
۲	Technology Service	•
+ Ac	ld Level	

If you wish to only show Objects that have a specific relationship select a 'Specific Context Relationship'



5. Select your Display Attributes and customize any details

splay Attributes ault Item Display Style							^
Attribute					×	Editabl	•
Display name							
Communities						-	
Click Behavior None		•	View			~	
Tooltip Attribute					×	-	
Reduced Display Styl	e Setting Show thumbnail 😒	× •	Minimal Display Style	Setting Show thumbnail (2)	×	-	

Auto-Generated Diagrams

How Do I Create Auto-Generated Diagrams?

Auto-Generated Diagrams create visual representations of a pre-configured metamodel journey whilst taking in the context of an object you are viewing. For example, the diagram below takes context from the Application that is selected then automatically creates a diagram based off of the users.

Air App	Cargo System											
DETAILS	FUNCTIONALITY	ASSESSMENT	CAPABILITY	IMPACT	TECHNOLOGY	DATA	COSTS	PROJECTS	RELATIONSHIPS	DIAGRAMS	ISSUES	ROADMAP
Re Enge System	Association											
					_ <u> </u>	Bagga	ge Manag	ement				
			1 Air Ca	irgo System	$\left(\left(\right) \right)$	-	Cargo					
					~	0	Dracle 10g					

1. First, select Diagram from your list of Collection Views

T_ApplicationComponent_ImpactDgm escription splay name npact text for event EA Agle v3 communities CONFIGURATION CUSTOMIZATION New Type Now Courds in Pows Accordion Olection Views Table $intermatic in the splay in t$	Di	Γ_Applicatio agram	nCompone	ent_ImpactDe	jm						
selay name pact staut for ervin EA Agle v3 communities configuration configu	Name OT_Applic	cationComp	onent_Imp	actDgm							Color
npact etads for envine EA Agile v3 communities configuration custoMization iew Type ayout Views Table Columns Rows Accordion ollection Views Table I I I I I I I I I I I I I I I I I I I	Descriptio	on									
communities	Display name mpact	e									
$\begin{array}{c} \label{eq:configuration} \\ \hline \end{tabular} \\ \hline tabular$	Default for en	rwin EA Agile v3	3								
iew Type arout Views Tabs Columns Columns Rows Nested List Tree List Diagram Columnt Colum	Communiti	es									
ayout Views Table Columns Table Kanban Pivot Table Pivot Table Table Pivot Table Pivot Table Pivot Details	CONFIGUE	RATION CI	USTOMIZAT	ION							
Tabs Columns Rows Accordion Ollection Views Image: Column to the state of t	/iew Type	e									
ollection Views Table Kanban Kested Tree List Diagram Count Wordcloud Roadmap Bar Chart Chart Pivot and Views Details	ayout Vie	WS									
ollection Views Table Kanban Kested Tree List Diagram Count Wordcloud Roadmap Bar Chart Chart Pivot and Views Details											
Table Kanban Kanban Kanba List Tree List Diagram Count Wordcloud Roadmap Bar Chart Scatter Chart Table arr Views			Rows	Accordion							
Table Kanban Nested Tree List Diagram Count Wordcloud Roadmap Bar Chart Scatter List Prvot Table em Views Details		Views									
List Chart Chart Pivot Table am Views Details				ス		.		AW	Ø	ılı	\sim
Pivot Table em Views	Table	Kanban		Tree	List	Diagram	Count	Wordcloud	Roadmap	Bar Chart	
Table am Views Details	⊞										
am Views											
	₽										
A	Details										
A		1410									
	<u>A</u>										

- 2. Auto-Generated Diagrams use *Journeys* to define their structure.
- 3. Finally, select the layout style for your diagram

CONFIGURATION	CUSTOMIZATION	
View Type	Diagram	~
Data Source		~
Diagram Layout		^
Layered Digrapl	1	
Force Directed		
Tree		
Lineage		
Impact		

Radar Charts

How Do I Create a Radar Chart?

There are two types of Radar Charts available to users in EA Agile v3. The first 'collection' is used for multiple object instances. The second 'item' is used on a single object instance.

As a Collection View



Figure A. Example of a Radar Chart analyzing multiple



Figure B. An example analyzing two attributes

- Before starting you must read and follow the instructions in the *New View* help page.
 - 1. Select 'Radar' from Collection Views



2. Add a Filter so your list only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter please visit the *Filters* help file)

CONFIGURATION C	JSTOMIZATION	
View Type	Radar Chart	~
Data Source		^
Source of Data		
Filter		Ŧ
≂Filter		
capab		
Capabilities		
High Perf Capability	,	
Capability - Suppor	ted By Applications realized by Software Out of Support	
Capability - High O	verall Performance	

3. Next, select your Display Attributes (Axis). These can be Arrays, Integers or Numeric Roll-Ups.

Displa	Display Attributes					
	Attribute Business capability performance	Ŧ	Editable	×		
**	Attribute Business Importance	Ŧ	Editable	×		
* *	Attribute Maturity Level	*	Editable	×		
**	Attribute Application Cost	*	Editable	×		
	Attribute Process Cost	*	Editable	×		
Add	Display Property					

4. Finally, select your display style. Selecting 'Analyze Attributes' will make the Display Attributes subject to comparison (see figure B at the top of the page)



As an Item View



An example of a Radar Chart used as an Item View

Before starting you must read and follow the instructions in the *New View* help page.
 As an Item View this Radar Chart is designed to compare attributes of a single object. Therefore there is no Data Source required and configuring only requires two steps.

1. Select 'Property Radar Chart' as your View Type

CONFIGUE	RATION CI	USTOMIZATI	ON								
View Type	e										^
Layout View	WS										
Tabs	Columns	Rows	Accordion								
Collection	Views										
		۲	大	≣	*		Aw	$\mathbf{\Phi}$	11.	(ଦ୍ର	
Table	Kanban	Nested List	Tree	List	Diagram	Count	Wordcloud	Roadmap	Bar Chart	Radar Chart	
$\mathbf{\lambda}$	⊞										
Scatter	Pivot										
Chart	Table										
Item Views											
≣	ଡ										
Details	Property	Property									
	Radar Chart	Count									

2. Next, select your Display Attributes (Axis). These can be Arrays, Integers or Numeric Roll-Ups. A filter is not required as this is an Item View so will take Context from the object selected.

	Attributes	E	Editable	
	Trategic Fit	*	\checkmark	×
	Attribute Impact		Editable	×
	Attribute Effort		Editable	×
	Attribute Customer Value		Editable	×
dd	Display Property			

3. Finally, click 'Save'
View Customization

Heatmaps

How Do I Create a Heatmap?

1. When configuring a View click on the blue 'Add Heatmap' button



2. This will bring up a blank Heatmap form

Overlay Heatmaps					
			Enabled	Color	
Filter	~	label	\checkmark		\times

- 3. Next, select the filter you wish to use for your Heatmap
 - a. You can either select a Filter that is already in the system or create a new one by clicking the blue + button



Overlay Heatmaps				
⇒ Filter gdpr	label	Enabled	Color	\times
Data Elements connected to GDPR Critical Ter				
G_Reports_GDPRData				
GDPR Business Terms				

- 4. In 'Label' enter the display name for your Heatmap, if left blank the filter name will be used
- 5. If you wish for your Heatmap to be automatically enabled, make sure the 'Enabled' checkbox has a tick in it
- 6. Finally, choose the color you wish to use for your heatmap

To add another Heatmap simply click 'Add Heatmap' and repeat Steps 2 – 6

Icon Attributes

How Do I Set an Icon Attribute?

On the erwin EDGE Platform you're able to set Icon Attributes which give you the ability to display an Icon of an Object Type's Attribute

1. To select an Icon Attribute type the name of your Object Type in the 'Icon Attribute' field, then select the Attribute of that Object Type for the Icon you wish to display



- a. You can now choose whether the Icon has a Click Behaviour. There are 5 options:
 - i. Context:
 - ii. None: Nothing will happen when the Attribute is clicked
 - iii. Open In Panel: A side panel will pop out
 - iv. Navigate To: Redirected to a new page displaying the set view
 - v. Open In Dialogue: The set view pops up in a box in the centre of the screen
- b. Open In Panel, Navigate To & Open In Dialogue require you to set a View to navigate to. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view. The most common choice is 'Default View For Type'

⊽Filter	
Default View For Type	
Business Term	
Business Term View	
OT_Test Object_DG_GENERAL	
OT_Test Object_DG_TABS	+

2. Once you have filled in all the necessary information you can continue with editing your view

Actions

How Do I Add an Action Button to a View

Actions are added to a View to provide additional functionality. In EA Agile there are the following Actions:

- Save Save the current state of your object
- Delete Delete the current object
- Duplicate Duplicate the current object
- Create Create an object of any type with or without a relationship to the Object of the View you have placed the action in
- Create Diagram Create a diagram
- Update Add a button to update the value of an attribute to a pre-defined value
- Download Download a CSV file containing all instances of the Object Type displayed in the view
- Import Import a CSV file to populate your current view
- Filter Add a search bar and on-the-fly filtering
- Attachments Attach files to an object
- View Navigate to another EA Agile View
- ItemDisplayStyle Add options to display attributes in different styles
- Report Download a business-friendly report of only objects and columns displayed in your view
- 1. When configuring a view click on the blue 'Add Action' button under Actions



2. This will bring up a set of options for you to configure your Action Button

Actions			
Action Type Save	Name Save	Icon Color	×
	Communities	¥	
	Location ActionBar	v	
	Close On Save		

- 3. Click on 'Action Type' and select your Action
- 4. For all Actions you must set the following:
 - Name
 - Icon
 - Color

- Communities (For more on Communities click here)
- Location
- 5. Some Action Types requires additional information specific to their type
- 6. To add another Action Button simply click 'Add Action' and repeat Steps 2-5
- 7. Once finished continue, with configuring your view or click 'Save' in the bottom right of the screen

How Do I Add a Create Button to a View

- 1. Follow steps 1 4 of 'How Do I Add an Action Button Within a View' & Select 'Create'
- 2. Select the Element Type you wish to create & choose if you want to create a relationship to context object

Actions						
Action Type	Name		loon	Co	lor	
+ Create +	Create		+	-		×
				_		
	Communities				~	
	Location					
	Floating				٢	
	Element Type	*	Create relationship to context object	ct .	-	
	Click Behavior					
	Context	*	View		~	

- 3. You can now choose whether it has a Click Behaviour. There are 5 options:
 - Context:
 - None: Nothing will happen when the Property is clicked
 - Open In Panel: A side panel will pop out
 - Navigate To: Redirected to a new page displaying the set view
 - Open In Dialogue: The set view pops up in a box in the centre of the screen

	Context
D	None
	Open In Panel
	Navigate To
	Open in Dialogue

Open In Panel, Navigate To & Open In Dialogue require you to set a View to navigate to. Clicking in the 'View' field allows you to select a View by searching by name, select from a list or create a new view.

The most common choice is 'Default View For Type'



- 4. To add another Create Button simply click 'Add Action' and repeat Steps 1-5
- 5. Once finished continue with configuring your view or click 'Save' in the bottom right of the screen

How Do I Add an Item Action to a View?

Item Actions are Actions that apply to Object Instances and are only available on Collection Views

1. When configuring a view click on the blue 'Add Action' button under Item Action



i

2. This will bring up a blank form for you to configure your Item Action

Item Actions				
Action Type Delete	•	Name Delete	 con Color	×
		Communities	•	

3. Click on 'Action Type' and select your Action

Choose from the following: Delete, Duplicate, Create, Update, View

- 4. For all Actions you must set the following:
 - Name
 - Icon
 - Color
 - Communities (For more on Communities click *here*)
- 5. Create, Update & View require additional information specific to their type
- 6. To add another Item Action simply click 'Add Action' and repeat Steps 2-5
- 7. Once finished continue with configuring your view or click 'Save' in the bottom right of the screen





Minimal Display Attributes

Within the Kanban, Details & Table view, view configurers can allow users to set different levels of display for attribute chips

ISSUES	BUSINESS TERMS ACRONYMS REFERENCE DATA DATA	SETS DATA ELEMENTS DATA SHARING AGREEMENTS POLICIE	S GLOSSARIES		
	name	description	applies to	assigned to	이 코는
	Wrong business owner	It should be allocated to John Doe	Insurance		
	Absolute Ratings definition is incorrect	It should also include the metrics for	Absolute Ratings		
	Employee Contract In Progress	Need a status of employment that's not quite employed, but not	Employment Status		
	Under Contract Employee	Under Contract is an employee that is not yet hired, but needs to be	Employment Status		
	This should be for 17 years and not 16	The law has changed	O A Person can only be employed if they a		

An example of a Table with full display attributes

ISSUES	BUSINESS TERMS ACRONYMS REFERENCE DATA DATA	SETS DATA ELEMENTS DATA SHARING AGREEMENTS POLICIE	S GLOSSARIES		
	name	description	applies to	assigned to	Q ∃≟
	Wrong business owner	It should be allocated to John Doe	0		
	Absolute Ratings definition is incorrect	It should also include the metrics for	₿		
	Employee Contract In Progress	Need a status of employment that's not quite employed, but not	Ð		
	Under Contract Employee	Under Contract is an employee that is not yet hired, but needs to be	0		
	This should be for 17 years and not 16	The law has changed	0		

An example of the same Table with minimal display attributes

1. When you are configuring a view within the 'Display Attributes' you will see Style Settings at the bottom of each Display Attribute

Displa	ay Attributes					^
Default Full	ltem Display Style					*
0 0 0 0 0 0	Attribute			× •	Editable	×
	Display name					
	Communities			~		
	Click Behavior					
	None	*	View	~		
	Reduced Display Style Setting Show text Show thumbnail	× •	Minimal Display Style Setting Show text Show thumbnail	× •		

If you don't wish to make the Style Setting configurable by the regular user choose your Settings then set the 'Default Item Display Style'

 Once you've set all of your styles you will need to add an 'Item Display Style' action. To know more see *Actions*.

Action Type EltemDisplayStyle	*	Name Item Display Style	lcon	•	Color	×
		Communities			~	
		Location TopRight			•	

Export as Report

i

Within Collection Views, users can add an 'export as report' action which creates a business-friendly report available for download. The report differs from a standard CSV download by only returning attributes predetermined by the user either by what they have displayed in the View or what has been specified in the settings. Reports also display related objects Names rather than ID. *Please note that these cannot be reimported like a standard CSV.*

To add the Export as Report action to your view please follow these steps.

1. Under 'Customization' open the 'Actions' accordion and click 'Add Action'

Default for erwin EA Agile v3		
Communities		
CONFIGURATION CUST	OMIZATION	
Styling		
, .		
Actions		
Action Type	Name	Icon Color
+ Create	 Create 	+ - >
	Communities	*
	Location	
	Floating	*
	Element Type	
	Q Idea	 Create relationship to context object
	Click Behavior	View
	Open In Panel	👻 🔠 Default View For Type 🛛 🗙 👻

2. Select 'Report'

Import	Name Create		Icon	Color	×
≂ Filter					
☑ View	Communities			•	
≇ ItemDisplayStyle	Location Floating			-	
Report					
	Element Type	*	Create relationship to context object	*	
	Click Behavior				
	Context	*	View	~	
Add Action					

 Choose a name and location for your Action. By default, all of your Display Attributes configured for the view are added to the report. You can remove or add Report Attributes without affecting the Display Attributes of your view.

Action Type B Report	Create report	
	Communities	~
	Location Header	Ŧ
	Attribute	- ×
	Display name	
	Attribute Status	- ×
	Display name	
	Attribute Prototypes	- ×
	Display name	
	Attribute Pairwise Ranking	- ×
	Display name	
	Voting Ranking	~ ×
	Display name	
	Attribute Sub Idea(s)	- ×
	Display name	
	Add Report Property	

						٥
name 🛧	🖌 Status		🖌 Painwise Ranking		✓ Sub Idea(s)	
Introduce tablets for mana	Q Exploration	Provide tablet	45	5	Provide tablet Provide remo Vind turbine	IS

Item Actions

I ltem Actions can be applied within Collection Views to apply an Action to an instance

The following Item Actions are available in EA Agile:

- Delete Delete an Object Instance
- Duplicate Duplicate an Object Instance
- Create Create an object of any type with or without a relationship to the Object attached to the Item Action
- Update Add a button to update the value of an attribute to a pre-defined value
- View Navigate to another EA Agile View
- OpenURL Open the webpage of an object if it has a URL attribute

An example of a table with the 'Delete' Item Action

name	🖋 Ideas Generated		
Ideas for IoT technologies projects we should evaluate in 2020 and bey	Q Introduce tabl Q Optimize the Q Safety and di	• Internet of Th	
Nominate technology trends for 2020 and beyond		🕐 Internet of Th 🔹 Smart City Te 🔹 Big Data 🔹 Artificial Intelli	
Which IoT technologies should we evaluate in 2020?		(Internet of Th	

1. To add an Item Action to a View first go to the 'Customization' tab in View Configuration and open the 'Item Actions' Accordion

CONFIGURATION	CUSTOMIZATION					
Styling						~
Actions						~
Overlay Filters	/ Heatmaps					~
Item Actions						^
Action Type		Name		lcon	Color	
Delete	-	Delete		i •		×
		Communities			•	
Add Action						

2. Click 'Add Action' and select your Action Type

Item Actions			^
Delete	Name Delete	Icon Color	×
Duplicate			
+ Create	Communities	•	
🖉 Update			
View			~

Diagrams

Diagram Views

Building a diagram from model content

Diagrams can be built directly from the underlying model.

As with any other view of the model such as a roadmap or pivot table, the diagram can be rendered by the user.

Each diagram type is pre-defined with the object types and relationships that the diagram supports.

A diagram can be given a name, type and description.

To modify the diagram contents, users can use the **search** function to create queries and find objects within the model - these can be simple, such as 'Name contains claim', or be more complex with multiple query rules defining the dataset the user is looking for. Multiple searches can be performed to complete the dataset.

Configure & Diagram	
Name Claim handling Business process	
Description	
Togs	
Oligram Type	
Business Process Viewpoint	*
Dataset	× २ ऱ :
No Okiante	
No Objects	
Find Objects by click search above.	

Multiple types can be added using the Search function, each type will be shown in the 'Dataset' section.

Objects that appear in this section will appear on the diagram. The checkbox will allow you to remove the object from the diagram.

etags								
Diagram Ty Rusines	pe s Process Viewpoint							Ŧ
Det					~	0		
Dat	aset				×	ų	Ŧ	:
	Name	💠 Туре						
	Accept Claim	Business process						
	Claim Paid	D Business event						
	Claim Reviewer	C) Role						
	Customer Experience Manager	CD Role						
	Customer File	Business object						
			Items per page:	5 -	1.5 c	of 12		>
DELE	TE						8	SAVE

Once complete, select the Diagram tab at the top of the page, and the diagram will be drawn automatically from the objects in the Dataset.



Box in Box relationships

Any relationship can be represented in box in box style.

Right hand mouse clicking on any relationship on a diagram will provide a 'Represent as Box' option. Each object that is at the ends of the relationship is presented. Choosing one of these will make it the parent box.



You may also add multiple relationships to a single parent by selecting relationships connected to different 'child' objects and using the right hand mouse option.

Right hand mouse clicking on the child object will allow you to remove that node from the group (Remove from Group).

	View Object	
	Show Relationships	
	Remove from group	
	Node Styles	>
	Resize	>
	Colorize	>
	Display	>
þ	Duplicate Node	
×	Remove Node	
Î	Delete Object	

For adding many related objects inside or outide of the box, please see *here*

Box Resizing

As default, boxes are resized by moving the nodes within them, the maximum size of the box is bound by the position of its child nodes. However, there maybe occasions when you would like to resize the group box to a bigger size for aesthetic purposes.

You can simply select the box and then drag the edges to the size you want.

This will allow you to drag the boundary to a minimum size. The parent box will never shrink below the size you resize it to.

You will also notice other options around resizing and colorizing available from the right click menu.

🖃 🗢 Back Office
Home and Away Financial Application
Customer Data Access

Node v Box Representations

You may also use the right hand mouse click to convert shapes to small, big or box style.



Hide/Reveal Relationships on diagrams

You may hide a relationship on the diagram by right hand mouse clicking on the relationship.

This will hide it on the diagram view but will not remove it from the model.



You can hide the selected relationship on the diagram. This will give the relationship a 'state' of hidden.

A relationship will also be set to a state of hidden upon being 'deleted' on the diagram.

Hiding relationships is useful if you want to focus on the other relationships when discussing models with stakeholders.

The diagram has a menu to display relationships according to their 'state' - right click on an empty space to see this.



Select Display.

<	back	
	Relationships	>

Then Relationships.

<	back
	All
	Visible
	Hidden

You can use this menu to show All relationships, Visible relationships only, or Hidden relationships.

You can return a relationship's state to 'visible' by displaying hidden relationships, right clicking the relationship, and selecting "Show Relationship".

Drawing

Users can draw symbols and lines onto the surface of diagrams to create or modify views of the model and the underlying model itself.

To initiate the drawing palette, simply create a new or open an existing diagram, and the toolbar will be shown on the left hand side.

The symbols available to you will be filtered to the assigned object types for the diagram type.

Drawing Basics

Press the expand button to see the drawing pane.



Select a symbol type from the drawing pane.



Drag the symbol type onto the diagram.



Notice the 'New' flag that displays the status of the symbol - this will disappear, either when the symbol is named and the diagram is saved, or an existing object is chosen for this symbol.

When the symbol is first introduced to the diagram, it will expect a name to be entered, otherwise doubleclick the symbol to enter a name.

As a name is entered, a filtered list will be displayed, of all objects of the selected type that have names that contain the entered characters.

Either;

- continue to type a new name to create a new object, or
- select an existing object from the list.

{ Business event #3 } Select existing or create Business event dama Damage Occurred

Add one or multiple existing objects to a diagram;

- Right click empty space on the diagram
- Select insert > Existing Objects

Insert		< Back
		Existing Objects
Display >	\Rightarrow	Text

Search for the objects you would like to add. This is the same as any other search in the platform.

ର Sea	rch					×
Criteria						
Invert	Criteria Type Name	~	Operator contains	× -	Value	& OR
						Q. Search
						ADD TO FORM

To relate objects on the diagram:

- Select a symbol. This will display a circle containing a 'link' icon.
- Click the link icon, and drag the relationship line to the 'target' symbol both symbols will be highlighted.
- Release the mouse and the relationship line will be drawn.



- Once the relationship has been drawn, a screen will be displayed allowing you to select the type of relationship.
- Choose the relationship type for this line symbol, you can type to search for the name of the relationship you wish to use.
- Select the OK button.

If no Select Relationship screen is displayed, there may be only one type available between the two symbols, and this has been applied.

Select Relationship between 'Business event' and 'Business process'						
Damage Occurred	≂ Filter triggers	Register Claim				
	triggers (triggered by)	CANCEL	ок			
2	triggered by (triggers)					

When this relationship type is selected and the diagram is saved, the relationhip is also created within the model.

The menu bar contains Edit, View, Tools, and Import menus:

Edit - Provides options to Undo/Redo changes, Remove objects and Select All symbols.



View - contains options to scale the diagram. The "Zoom To" submenu contains preset values such as **100%** and **To Fit.**

The Grid Settings submenu has a **Snap To** option that will make aligning symbols easier. (See more detail below.)

	Display Legend	
	Fullscreen	
ତ୍	Zoom In	
ବ୍	Zoom Out	
	Zoom To	>
	Grid Settings	>
	Layout	>
	Layout Settings	>
	Node Styles	>
	Link Styles	>
	Diagram Styles	>

If multiple node symbols have been selected, the Layout Settings submenu provides **Align Selected Nodes By** and **Space Selected Nodes** options.

Aligning Nodes

Multiple symbols can be aligned based on their Tops, Bottom, Left, or Right sides.

In the example diagram extract below;

Tops, would move the "Maintaining Intermediary Relations" and "Intermediary" symbols up, to align with the top of "Maintaining Customer Relations".

Bottoms, would move the "Intermediary" and "Maintaining Customer Relations" symbols down, to align with the bottom of "Maintaining Intermediary Relations".



Aligning symbols on their centres is best achieved by enabling the **Snap To** option.

Spacing Nodes

Multiple symbols can be spaced apart or separated by the same amount of space, in rows or columns.

The first symbol selected will not move, while all other selected symbols will be spaced to the right or below this symbol.



Grid Settings - the Grid Settings submenu can be accessed from the View menu.



The Grid can be displayed, its 'size' set to a different value, and symbols can be moved to snap to the grid.

	View - Tools - Import -	
	< back	
,	Display	
	Snap To	
wc	Set Size	

You can also change the overall styling of a diagram using Diagram Styles, this can be selected from the view menu and there is two options to choose from, standard or traditional.



Standard Style





Multiple object instances on diagrams

Objects can appear on a diagram multiple times

To do this, users can **right click** > **Duplicate** any existing object

The duplicate will be added, along with all of the existing relationships and formatting from the original - a duplicate icon will be added to both symbols

Neither object is the master - they are representationally consistent.



The user can then amend the duplicate object symbol and hide/show a different set of relationships to the first, as they require.

Deleting a relationship will delete it from both instances.



Users can also change the appearance of either symbol, independent of each other.



This feature is not yet useable on BPMN or Entity Relationship diagrams - This will be a later phase for the feature

Permitted relationships when drawing a diagram

When drawing relationships between concepts, there may be occasions when you are not permitted to draw a line.

1. No relationship exists in the meta model for two object types

If there is no relationship type in the meta-model between two object types, then you cannot create a relationship between them.

2. Directional flows

Some relationships are directional. That is, if they have an arrow head at the destination, then you are required to draw from the source object to the destination object.

If a relationship is bi-directional e.g. associated with, then you can draw from either end.

3. Diagram Type doesn't support the relationship

Diagrams are viewpoints on the underlying model. A diagram may represent some object types, and some relationship types between those object types. This is typically because a viewpoint is created for different stakeholders who may wish to look at different types of relationships. For example, in ArchiMate, an **infrastructure usage viewpoint** shows **infrastructure service** with a **served by** relationship to an **application component**. An **implementation and deployment** viewpoint shows **application components** and **infrastructure services** but not the **served by** relationship.

Our meta-model faithfully reproduces the viewpoints from ArchiMate. However, we do provide the ability for administrators to modify the view and add all of the relationships between object types that are placed on a diagram.

Diagram commands

Function	Keyboard and mouse control
Context Menu	Right hand mouse button or Menu Key with Object selected.
Select All	Ctrl-A
Scroll	PageUp & PageDown
Zoom Decrease	Keypad - (minus)
Zoom Increase	Keypad + (plus)
Zoom Reset	Ctrl-0
Zoom to Fit	Shift-Z
Cancel	Esc
Undo	Ctrl-Z
Redo	Ctrl-Y

Keyboard and mouse commands are available on diagrams.

Add Related Objects

The Add Related Objects function on diagrams allows you to explore the content of the model in the current client area. It displays a graphical view that shows the relationships between objects, and allows you to quickly slice across the metamodel, focussing in on areas of interest e.g. If an application has an issue, we can see the related processes that may be affected and identify areas where we may see knock-on effects in business services and the ability to deliver/provide products.

The choices are to populate in a radial fashion around the object, or to populate in a box-in-box format.

Using Add Related Objects function

Radial Layout



Right click on an object on a diagram and choose **Add related objects**

A list of *objects to Add* is pre-populated with any object that has a relationship to the object you right clicked on

Selecting Show Filters will allow users to narrow down the search criteria being used

Add objects related to 'H	ome & Away Pol	icy Administratior	ľ
Box In Box		Allow Duplicat	es
Objects to Add			Ŧ
Name	Туре		\$
Claim Data Management	(1) A	pplication component	
Claim Management	de c	apability	
Customer Data Managemen	a 🗊 A	pplication component	
Policy Data Management	(pplication component	
Risk Assessment	(1)	pplication component	
	Items per page: 5		>
		CANCI	EL OK

By default, all relationship types are populated within the search - Users can remove these as they wish

Users can also use smart queries searching to produce very specific criteria e.g. Type = Application component or has a relationship to a business service Z with attribute X set to Y

	posed of (com ciated with (is	. ,	-	ed by) 🔇	3	*
Invert	Criteria Type Name	*	Operator contains	Ŧ	Value	∎ ANE OR

Once users click the Search button, the list is filtered as they requested

Users can select some or all of the objects within the list and when they select OK, the chosen objects will be added into the diagram in a radial layout.



If users select to add related objects again, the process is additive. If users do not select the Allow Duplicates option, then objects will only be allowed to appear on the diagram once.



Users can then repeat the add related concepts with other objects on the digram, to quickly traverse the metamodel and build a slice across the model

Box-in-Box layout

Right click on an object on a diagram and choose Add related objects



A list of *Objects to Add* is pre-populated with any object that has a relationship to the object you right clicked on

Selecting Show Filters will allow users to narrow down the search criteria being used

Add objects related to 'He Show Filters Layout Box in Box	ome & Awa	y Po	olicy	Administration'	
Objects to Add					Ŧ
Name	¢	Туј)e		¢
Claim Data Management		1	Applica	tion component	
Claim Management		₫	Capabil	lity	
Customer Data Management	t	1	Applica	tion component	
Policy Data Management		1	Applica	tion component	
Risk Assessment		1	Applica	tion component	
	Items per page:	5	•	1-5 of 5 <	>
				CANCEL	ок

By default, all relationship types are populated within the search - Users can remove these as they wish

Users can also use smart queries searching to produce very specific criteria e.g. Type = Application component or has a relationship to a business service Z with attribute X set to Y

is com	posed of (con	poses) 🕴 uses (us	ed by) 🔇	3	-
is asso	ociated with (is	assoc	iated with) 📀			
Invert	Criteria Type Name	•	Operator contains	*	Value	and OR

Once users click the Search button, the list is filtered as they requested

When users select the Box in Box checkbox, some more options appear. The options allow the user to

- choose how many columns they would like the objects they are adding, added into
- If they would like to resize all of the boxes to be the same size as the biggest to create a uniform display

Add objects re	lated to 'Ho	me & Away Policy A	dministration'	
Show Filters				
Box In Box	Columns 3	Resize Nodes	Allow Duplicates	
Objects to A	dd		-	Ŧ
Name		🚔 Туре		¢
Claim Data	Management	Applicat	ion component	

Users can select some or all of the objects within the list and when they select OK, the chosen objects will be added into the diagram in a box in box layout, within the starting box.

Obje	ects to Add						÷
	Name	¢	Ту	pe			\$
	Claim Data Management		1	Applicati	ion componen	t	
	Claim Management		₫	Capabilit	ty		
	Customer Data Management		1	Applicati	ion componen	t	
	Policy Data Management		1	Applicati	ion componen	t	
	Risk Assessment		1	Applicati	ion componen	t	
L		Items per page:	5	•	1-5 of 5	<	
					c	CANCEL	ок

E Home & Away Policy Admin	nistration	
Claim Data Management	Claim Management	Customer Data Management
Policy Data Management	Risk Assessment	

Users can change the layout of a group, by **right clicking the group object** > **Group layout** and choosing to resize all shapes in the group, or setting the number of columns

	View Object	
	Add related objects	
Home & Away Policy Administration	Group layout	>
Claim Data Management	Resize	>
Policy Data Management State Risk Assessment	Colorize	>
	Display	>
	Duplicate Node	
	× Remove Node	
	< Back	
	1	
Home & Away Policy Administration	2	
Claim Data Management	3	
Policy Data Management S Risk Assessment	4	
	5	
	6	
E E Home & Away Policy Administration		



If users select to add related objects again, the process is additive. If users do not select the Allow Duplicates option, then objects will only be allowed to appear on the diagram once.

E Home & Away Policy Administration	(1
Claim Data Management	Customer Data Management
Policy Data Management	Claim Management
Risk Assessment	Claim Data Management
Claim Data Management	E Bank System
Home & Away Policy Administration	
Data Modelling

Data modelling diagrams are created using the diagram type, Entity Relationship Diagram.

← ✓ CONFIGURE		
Name		
Insurance Policy Model		
Description		
Tags		
Diagram Type Entity Relationship Diagram		
Entity Relationship Diagram		•
Dataset		× Q = :
	No Objects	
	Find Objects by click search above.	

Entity Relation diagrams contain Entity objects. Existing Entities can be searched for, by using the magnifying glass icon, and then selected to be added to the list of objects in the diagram's Dataset. The Entities listed in the diagram's Dataset will be visible after clicking on the DIAGRAM tab at the top of the page.

Entities can be added to the diagram by dragging the **Entity**, from the palette on the left hand side, onto the diagram.

Smart Queries:
Edit - View - Tools - Import -
Entity

The Add Entity dialog will expect a new name to be entered, or an existing name to be selected.

Add Entity		
	CANCEL	ок

Clicking **OK** or pressing the Enter key, will add the Entity to the diagram. Selecting an existing name will add that Entity to the diagram.

+

It is expected that an Entity will 'contain' Attribute objects. To add new Attributes, click the + button in the top right corner of the Entity.

Add attribute to 'Customer'			
Name ID	✓ Primary Key		
	CANCE	ок	

A Name is required, before clicking the **OK** button. The example above, shows an **ID** attribute, identified as the Primary Key of Customer.

Attribute objects are not to be confused with property attributes. An Attribute object will have its own property attributes, such as "Is Primary Key Of".

Customer	+
▲ Primary Key	S
♦ID	ΨX
▲ Non-Key Att	ributes
⇒First Name	τ×
	τ×

Attributes are displayed inside their Entity, but the model is not updated until the diagram is saved.

An Attribute object will be created for each Attribute. The name will be prefixed by the Entity name, and separated by a period. e.g. **Customer.ID**

Save the diagram regularly to ensure that the diagram and model are updated.

Clicking away from a diagram without saving it will lose all recent changes.

Entities can be related to each other by drawing a relationship. A Relationship object will be created to further describe this relationship.



The Add Relationship dialog will require a Name to be entered before clicking **OK**.

Add Relationshi	р			
Name		Туре		
places		Parent/C	hild	•
ldentifying	Nullable	Child Cardinality Zero or many		•
Parent			Child	
Customer	places	0 m	Order	
			CANCEL	ок

ĩ

The example above describes the **places** relationship between a Customer and an Order. The Type of relationship is **Parent/Child** to indicate that an Order must have one, and only one, Customer to exist. The Child Cardinality of **Zero or many** indicates that a Customer can exist without having placed any orders. The relationship is not Identifying, so the Order will not require the Customer's Key as part of its own Key. A Relationship object will be created with the name **Customer places order**.

The Relationship can be edited by right clicking, and selecting the Edit Relationship option, but its Type cannot be changed.

The relationship will then be displayed on the diagram using "Crow's Feet" notation.



Note that the foreign key **Customer.ID**, has been automatically added to Order.

Entity objects can be edited in the same way as other objects, while Attribute and Relationship objects will have restrictions on their update

Examples of Views

Organization Viewpoint

The Organization viewpoint focuses on the (internal) organization of a company. It can be represented hierarchically or as a box in box view.

The Organization viewpoint is used to identify competencies, authority, and responsibilities in an organization.

The object types for the organization viewpoint are:

Business actor, Business collaboration, Business interface, Business role, and Location.

Product Development	1 Finance
Document Processing SSC	
Sack Office	Front Office
Car Legal Aid	Intermediary Relations

Actor Co-operation Viewpoint

The Actor Co-operation viewpoint focuses on the relationships of actors with each other and their environment.

This viewpoint is also used to show how a number of co-operating actors or application components, work together to realize a business process.

The object types for this viewpoint are:

Application service, Application interface, Application component, Business actor, Business collaboration, Business interface, Business role, and Business service.



Business Function Viewpoint

The Business Function viewpoint shows the main business functions of an organization and their relationships in terms of the flows of information, value, or goods between them.

Business functions represent the most stable operations of an organization.

This view provides a high level insight into the operations of a company.

The object types for this viewpoint are:

Business Actor, Business Function, and Business Role.



Business Process Co-operation Viewpoint

The Business Process Co-operation viewpoint is used to show the relationships between one or more business processes with each other and/or with their environment.

The object types for this viewpoint are:

Application service, Business service, Business object, Business process, Business function, Business role, Business actor, Business event, Business interaction, Business collaboration, Representation, and Location.



Business Process Viewpoint

The Business Process viewpoint is used to show the high-level structure and composition of one or more business processes.

ArchiMate[®] provides many of the same underlying objects as the business process modelling notation (BPMN). ArchiMate[®] can be used very easily in conjunction with BPMN as an alternative viewpoint.

The object types for this viewpoint are:

Application service, Business service, Business object, Business process, Business function, Busines role, Business actor, Business event, Business interaction, Business collaboration, Representation, and Location.



Product Viewpoint

The Product viewpoint depicts the value that these products offer to the customers or other external parties involved, and shows the composition of one or more products in terms of the constituting (business or application) services.

A product viewpoint is typically used in product development to design a product by designing services that a customer expects from it.

The object types for this viewpoint are:

Product, Value, Contract, Business service, Business interface, Business event, Business process, Business function, Business interaction, Business role, Business actor, Application service, Application interface and Application component.



Application Behaviour Viewpoint

The Application Behaviour viewpoint describes the internal behaviour of an application; e.g. as it realizes one or more application services.

This viewpoint is useful in the designing how applications behave and how applications functionally overlap.

The object types for this viewpoint are:

Application service, Application interface, Data object, Application function, Application component, Application collaboration and Application interaction.



Application Co-operation Viewpoint

The Application Co-operation viewpoint describes the relationships between application components in terms of the information flows between them, or in terms of the services they offer and use.

This viewpoint is often used to create an **application landscape** view of the organization.

The object types for this viewpoint are:

Application service, Application interface, Data object, Application function, Application component, Application collaboration, Application interaction, and Location.



Application Structure Viewpoint

The Application Structure viewpoint shows the structure of one or more application components.

The main use of this viewpoint is to understand the main architecture of applications and their associated data.

The object types for this viewpoint are:

Application interface, Data object, Application component and Application collaboration.



Application Usage Viewpoint

The Application Usage viewpoint describes how applications are used to support one or more business processes, and how they are used by other applications.

This viewpoint is useful when designing an application through identification of the required business services and processes, or in designing processes by describing the application services available to it.

The object types for this viewpoint are:

Business event, Business object, Business process, Business interaction, Business function, Business role, Application service, Data object, Application interface, Application component and Application collaboration.



Infrastructure Viewpoint

The Infrastructure viewpoint contains the software and hardware infrastructure elements supporting the application layer, such as physical devices, networks, or system software (e.g., operating systems, databases, and middleware).

This viewpoint is ideal to describe the infrastructure and its relationships to locations.

The object types for this viewpoint are:

Artifact, Infrastructure service, Infrastructure interface, Infrastructure function, Node, Communication path, Location, System software, Device, and Network



Infrastructure Usage Viewpoint

The Infrastructure Usage viewpoint shows how applications are supported by the software and hardware infrastructure: the devices deliver the infrastructure services; system software and networks are provided to the applications.

This viewpoint is important in analysing quality, performance and scalability, as it relates the physical infrastructure to the applications.

The object types for this viewpoint are:

Application function, Application component, Infrastructure service, Infrastructure interface, Infrastructure function, Node, Communication path, System software, Device and Network.



Implementation and Deployment Viewpoint

The Implementation and Deployment viewpoint shows how one or more applications are realized on the infrastructure.

This viewpoint is important when examining dependencies between physical infrastructure and applications.

The object types for this viewpoint are:

Application collaboration, Data object, Application component, Artifact, Infrastructure service, Node, Communication path, System software, Device, and Network.



Information Structure Viewpoint

The Information Structure viewpoint is comparable to the traditional information models created in the development of almost any information system.

This viewpoint shows the structure of information and their relationships. It also maps business level data, to application level data, and how these map to the underlying infrastructure.

The object types for this viewpoint are:

Meaning, Representation, Business object, Data object and Artifact.



Service Realization Viewpoint

The Service Realization viewpoint is used to show how one or more business services are realized by the underlying processes (and sometimes by application components).

This viewpoint provides a bridge between the product and business process view.

The object types for this viewpoint are:

Business service, Business event, Business collaboration, Business object, Business process, Business function, Business interaction, Business role, Business actor, Data object, Application service, Application component, and Application collaboration



Layered Viewpoint

The layered viewpoint pictures several layers and aspects of enterprise architecture in one diagram.

This view is used to support analysis and impact of change on the model.

The object types for this viewpoint are **all** core concepts and relationships.



Stakeholder Viewpoint

The stakeholder viewpoint allows the analyst to model the stakeholders and the internal and external drivers for change.

The stakeholder viewpoint focuses on the stakeholders (that are actually special types of business role), drivers, the assessments of the drivers, and initial goals that address the drivers and assessments.

The object types for this viewpoint are:

Stakeholder (Business role), Driver, Goal, Assessment.



Goal Realization Viewpoint

The Goal Realization viewpoint focuses on refining the initial, high-level goals into more concrete (sub-) goals using the aggregation relationship, and finally into requirements and constraints using the realization relationship.

Principles can be shown that aid the refinement of goals into requirements.

The refinement of goals is expressed through aggregation and composition relationships.

The object types for this viewpoint are:

Goal, Requirement, Principle and Constraint.



Goal Contribution Viewpoint

The Goal Contribution viewpoint focuses on modelling and analysing the influence relationships between goals and requirements.

This viewpoint is typically used after goals and sub-goals have been defined, and are used to show the impact that goals have on one another, so that conflicts can be resolved.

The object types for this viewpoint are:





Principles Viewpoint

The Principles viewpoint focuses on modelling the relevant principles, and the goals that motivate those principles.

Principles can influence each other positively and negatively.

The object types for this viewpoint are:

Goal, Principle.



Requirements Realization Viewpoint

The Requirements Realization viewpoint focuses on modelling the realization of requirements and constraints by means of core elements, such as actors, services, processes, and application components.

This viewpoint is typically used to model requirements and how they are realized, and to refine requirements into more detailed requirements.

The object types for this viewpoint are:

Goal, Requirement, Constraint, and any Core element.



Motivation Viewpoint

The Motivation viewpoint covers the entire motivational aspect, and allows one to use all motivational elements.

Typically the motivation viewpoint is used to model the complete or partial view of motivation including stakeholders (business roles).

This view is similar to the business motivation model used in other frameworks.

The object types for this viewpoint are:

Stakeholder (Business role), Driver, Assessment, Goal, Principle, Requirement and Constraint.



Project Viewpoint

The Project viewpoint is primarily used to model the management of architecture change.

This viewpoint is used to show the work packages and their deliverables. It also shows the goals that the work packages realize, and the stakeholders (Business roles) involved.

The object types for this viewpoint are:

Goal, Deliverable, Work package, Business role and Business actor.



Migration Viewpoint

The Migration viewpoint is used to model the transition from an existing architecture to a target architecture.

This viewpoint represents the migration planning from a current state to a future state architecture.

The use of this viewpoint is described in more detail in the workspaces topic

The object types for this viewpoint are:

Gap, and Plateau.



Implementation and Migration Viewpoint

The Implementation and Migration viewpoint is used to relate programs and projects to the parts of the architecture that they implement.

This view provides the scope to work packages, and the plateaus that they support. Any objects or core elements affected by a work package or plateau can be shown here.

This viewpoint can be use in combination with the programs and projects viewpoint, and the implementation and migration viewpoint to support portfolio management.

The object types for this viewpoint are:

Location, Business role, Business actor, Work package, Deliverable, Requirement, Constraint, Goal, Plateau, Gap, and any other Core element.



Business Capability Viewpoint

The Business Capability viewpoint is used to describe one or more business capabilities, their hierarchy, and their relationships with each other objects including inputs and outputs.

The hierarchy represents an aggregation or composition relationship.

The viewpoint may also include drivers and metrics for each capability as well as the stakeholder (business role) that supports it.

The object types for this viewpoint are:

Deliverable, Business capability, Stakeholder (Business role), Driver, and Metric.



Business Capability Increment Viewpoint

The Business Capability Increment viewpoint can show how a project can bring about one or more capability increments, and a single increment can be realized by one or more projects.

This view is usually for a single capability increment, and includes the motivation aspects of the increment.

The object types for this viewpoint are:

Driver, Assessment, Metric, Goal, Work package, Deliverable, Capability increment, Plateau and Business capability.



Idea to Delivery Viewpoint

The Idea to Delivery viewpoint is used to show how an idea is realised through to implementation.

The motivation behind the idea and work packages is included.

This view is ideal to those users modelling both Innovation Management and Agile EA concepts.

The object types for this viewpoint are:

Idea, Requirement, Goal, Driver, Assessment, Constraint, Principle, Deliverable, Work package, and any Core element.



Capability to Application Component Viewpoint

The Capability to Application Component viewpoint provides a view of how business capabilities are related with application components. This view is ideal for users that want to show application portfolios and how they are linked to the capabilities of the business.

The object types for this viewpoint are:

Application component, and Business capability.



Relationship Manual Edit Mode

Provides a mode that a diagram can be placed into to 'hide' the representational consistency of our tool within chosen diagrams. This will allow users to build diagrams that they may consider 'snapshotted' or 'finished', that they do not want to then be updated with relationships between model objects, that may be out of context for the particular diagram.

The mode will stop any model relationships being added and made visible to a diagram without input from a user.

The check box on the diagram configure page allows the diagram to be placed in the **Manually Update Relationships** mode. It will also provide a view of how many hidden relationships the diagram has hidden currently.

Current 👻 > Diagrams > Home & Away Software Su	c	ર	÷	•	-	
→ CONFIGURE & DIAGRAM					:	
Name Home & Away Software Suite						
Description Home & Away system manages the Policy and Administration and Finar	ces specifically for insurance companies.					
Diagram Type Application Structure Viewpoint						÷
Tags	Manually Update Relationships O relat	tionships hidden (out of 15)				

Once in this mode when a user opens a diagram, if there has been a relationship added to the model that would have been auto-added to the diagram, they will be presented with a dialog box showing the changes that have not yet been applied

Ŧ	Choose the relationships you would like to be visible							
		From	Relationship Name		То			
		Customer Data Access	used by (uses)		Claim Valid	ation		
			Items per page: 5	•	1-1 of 1	<	>	
							ОК	
					2			•

The user can either choose to

- Selecting the checkbox of a relationship, which will add the relationship to the diagram and make it **visible.**
- Not selecting the checkbox of a relationship, which will add the relationship to the diagram and then **hide** it.

The diagram is still consistent with the model, but the representation has been chosen by the user...which then allows existing features to work as-is.

- Users can continue to update the diagram by drawing relationships This works as normal.
- If a user adds an existing object from the model to the diagram, any existing relationships will be shown to the user in a panel again they can choose to add or hide

If the user Duplicates an object on the diagram, all of the possible relationships will be presented in the dialog box to select from...Again the user chooses how to update the diagram with this information.

Cho	oose the relationshi	ps you would like to b	e visible	
	From	Relationship Name	То	
	Customer Data Manag	flows to (flows from)	Home & Away Financials	
	Home & Away Financials	used by (uses)	Claim Validation	ar cess
	Home & Away Financials	used by (uses)	Bank System	
		Items per page: 5 👻	1-3 of 3 < >	
1	Policy Data	Management Risk Assessme	Customer Data M	Nanagement Home & Away Financials Home & Away Financials

When the diagram is taken out of the mode, the hidden relationships remain hidden (unless the user makes them visible again), and the daigram will go back to auto-adding relationships from the model objects to the diagram.

The diagram is still consistent with the model and will continue to be, with the removal of relationships, objects and changes to objects still being displayed as normal.

Diagram Context Menu Structure

Right clicking in blank space provides the following options

Insert

- ➤ Existing Objects
- ≻ Text

Display

- ➤ Relationships
 - ≻ All
 - > Visible
 - > Hidden

Right clicking on an Object provides the following options

View Objects

Add related objects

Node Styles

- ➤ Convert to Box
- ➤ Convert to Small

Resize

≻ Text

> Increase/decrease and a range of size value

Colorize

≻ Text

≻ Icon

Display

```
➤ Order
```

Bring to Front/Send to Back/Increase/Decrease

Duplicate Node

Remove Node

Delete Object

Right clicking on a relationship provides the following options

Reset Link Shape

Represent as Box

➤ Parent choices

Line color

Hide Relationship

Delete Relationship

Top Tips

Creating a Static Link to a View

You can reference views externally to the product. For instance you want to store a reference to a Business Term or an Application object page.

To do this you will need the Object ID found in the top right hand corner of Object views

	ounting period iness Term				62	28132	Z	?
DETAILS	IMPACT	DATA DICTIONARY	DATA SHARING AGREEMENTS	ISSUES				
Name								

You can then add this ID to the following URL, replacing the part [object_id]

https://myerwin.io/dg#views/default?mode=viewing&contextId=[object_id]

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- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online

View services to assist you with your product.