erwin EA Agile V3

User Help Guide

Patents

Trademarks

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.

erwin EA Agile V3 -User Help Guide
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Contents

Administration 1

- Communities 3
- Application Settings 6

MetaModel 7

- Object Types 7
- Relationships 10
- Workspaces 11
- CSV Import 14
- CSV Export 16
- Communities 18
- Registering a new user of EA Agile 23

Data Source 28

- Journeys 28
- Filters 31
- Context 33
- Queries 34

Views 37

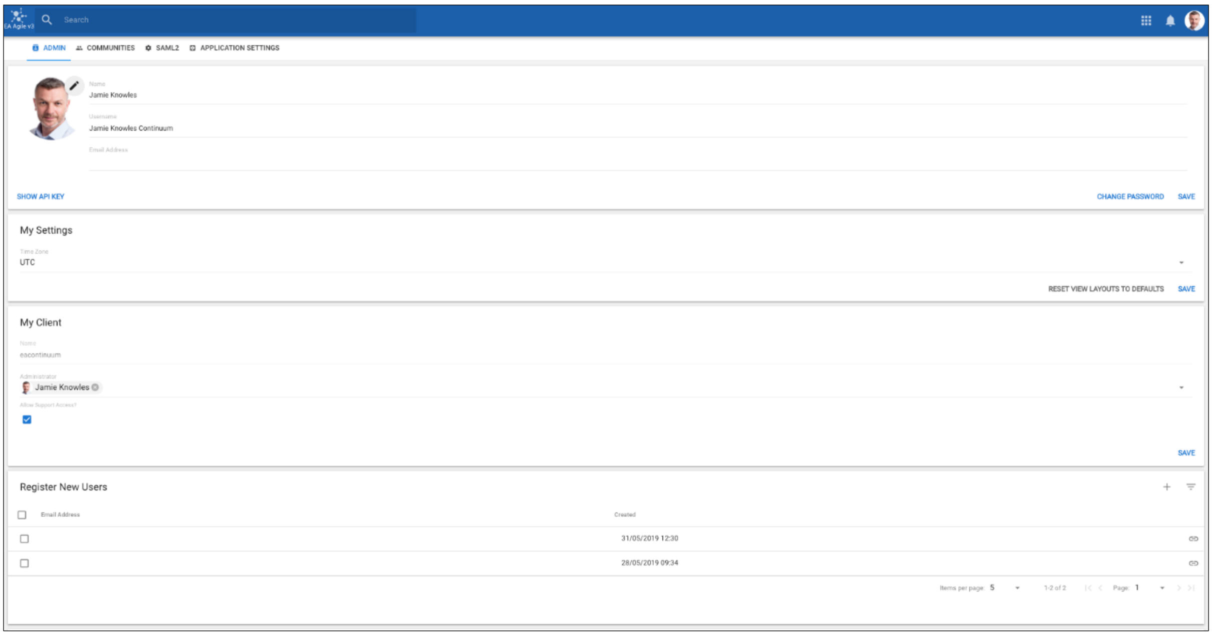
- New View 37
- Default View 41
- Details View 44
- Rich Text View 49
- Conditional Views 51
- Layout 53
  - Columns View 53
  - Rows View 57
  - Tabs View 59

Accordion View 63
Collection Views 65
Kanban View 65
List View 69
Roadmap View 72
Count View 76
Tree View 78
Table View 80
Scatter Chart 84
Stacked Bar Chart 86
Word Cloud 88
Pivot Tables 90
Nested List 93
Auto-Generated Diagrams 96
Radar Charts 98
View Customization 103
Heatmaps 103
Icon Attributes 104
Actions 105
Minimal Display Attributes 109
Export as Report 111
Item Actions 113
Diagrams 114
Diagram Views 114
Drawing 120
Multiple object instances on diagrams 128
Permitted relationships when drawing a diagram 130
Diagram commands 131
Add Related Objects 132
Data Modelling 139
Examples of Views 143
Organization Viewpoint 143

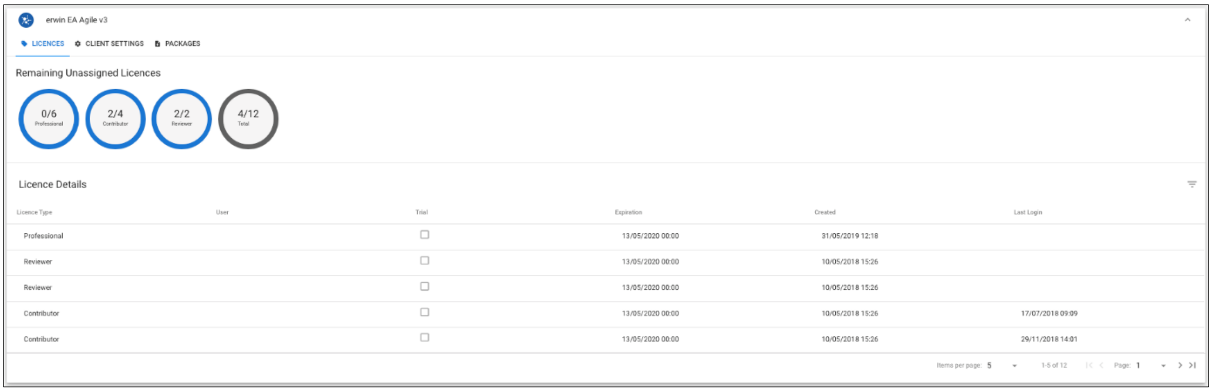
Actor Co-operation Viewpoint 144
Business Function Viewpoint 145
Business Process Co-operation Viewpoint 146
Business Process Viewpoint 147
Product Viewpoint 148
Application Behaviour Viewpoint 149
Application Co-operation Viewpoint 150
Application Structure Viewpoint 151
Application Usage Viewpoint 152
Infrastructure Viewpoint 153
Infrastructure Usage Viewpoint 154
Implementation and Deployment Viewpoint 155
Information Structure Viewpoint 156
Service Realization Viewpoint 157
Layered Viewpoint 158
Stakeholder Viewpoint 159
Goal Realization Viewpoint 160
Goal Contribution Viewpoint 161
Principles Viewpoint 162
Requirements Realization Viewpoint 163
Motivation Viewpoint 164
Project Viewpoint 165
Migration Viewpoint 166
Implementation and Migration Viewpoint 167
Business Capability Viewpoint 168
Business Capability Increment Viewpoint 169
Idea to Delivery Viewpoint 170
Capability to Application Component Viewpoint 171
Relationship Manual Edit Mode 172
Diagram Context Menu Structure 174
Top Tips 176
Creating a Static Link to a View 176

Administration

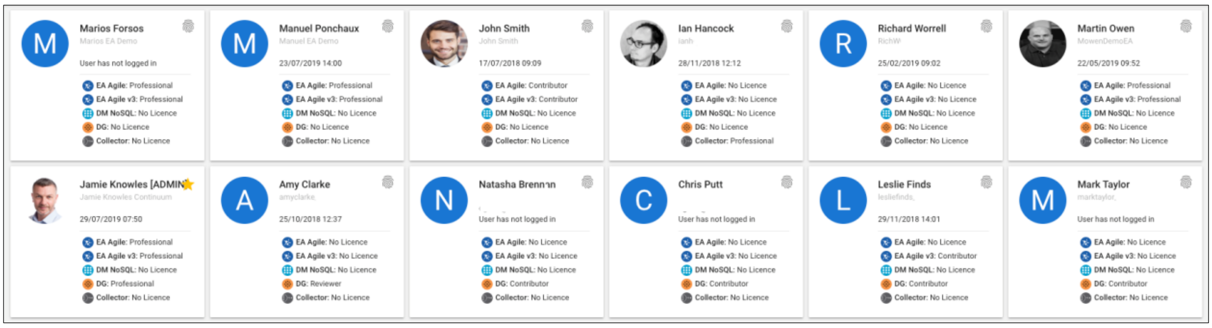
1. In the Account section of the System menu you will find the Admin panel. Here you can edit your users settings, show your API key, change time zone settings and more (depending on your level of access)



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.



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.


Marios Forsos
Marios EA Demo
User has not logged in
EA Agile: Professional
EA Agile v3: Professional
DM NoSQL: No Licence
DG: No Licence
Collector: No Licence
Manuel Ponchaux
Manuel EA Demo
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EA Agile: Professional
EA Agile v3: Professional
DM NoSQL: No Licence
DG: No Licence
Collector: No Licence
John Smith
John Smith
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EA Agile: Contributor
EA Agile v3: Contributor
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DG: No Licence
Collector: No Licence
Ian Hancock
ianh
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EA Agile: No Licence
EA Agile v3: No Licence
DM NoSQL: No Licence
DG: No Licence
Collector: Professional
Richard Worrell
RichW
25/02/2019 09:02
EA Agile: No Licence
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Martin Owen
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EA Agile: Professional
EA Agile v3: Professional
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Collector: No Licence
Jamie Knowles [ADMIN
Jamie Knowles Continuum
29/07/2019 07:50
EA Agile: Professional
EA Agile v3: Professional
DM NoSQL: No Licence
DG: Professional
Collector: No Licence
Amy Clarke
amyclarke
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EA Agile: No Licence
EA Agile v3: No Licence
DM NoSQL: No Licence
DG: Reviewer
Collector: No Licence
Natasha Brennan
User has not logged in
EA Agile: No Licence
EA Agile v3: No Licence
DM NoSQL: No Licence
DG: Contributor
Collector: No Licence
Chris Putt
User has not logged in
EA Agile: No Licence
EA Agile v3: No Licence
DM NoSQL: No Licence
DG: Contributor
Collector: No Licence
Leslie Finds
lesliefinds
29/11/2018 14:01
EA Agile: No Licence
EA Agile v3: Contributor
DM NoSQL: No Licence
DG: Contributor
Collector: No Licence
Mark Taylor
marktaylor
User has not logged in
EA Agile: No Licence
EA Agile v3: No Licence
DM NoSQL: No Licence
DG: Contributor
Collector: No Licence

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.

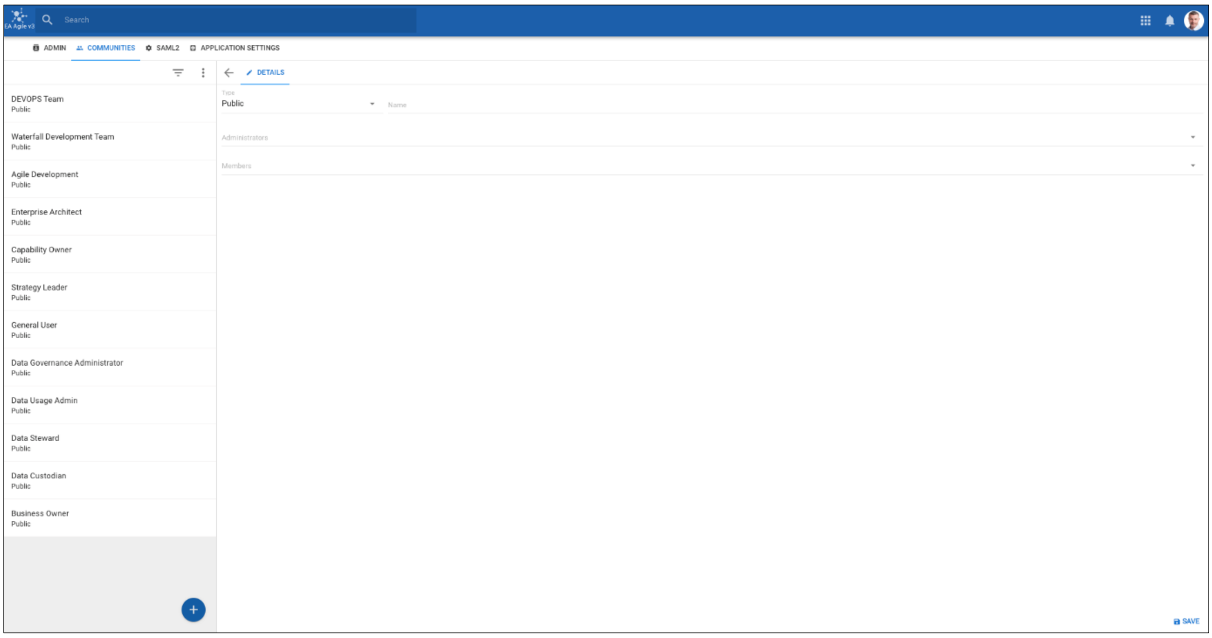
An organization could create a community for Development which contains all development staff and development management.

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



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.

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.

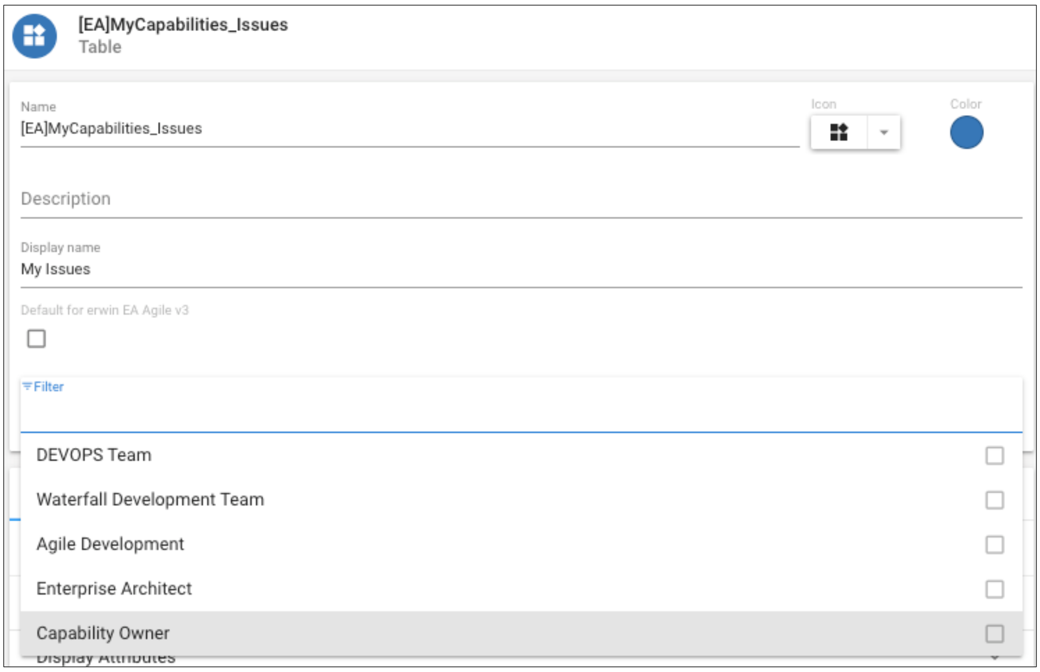

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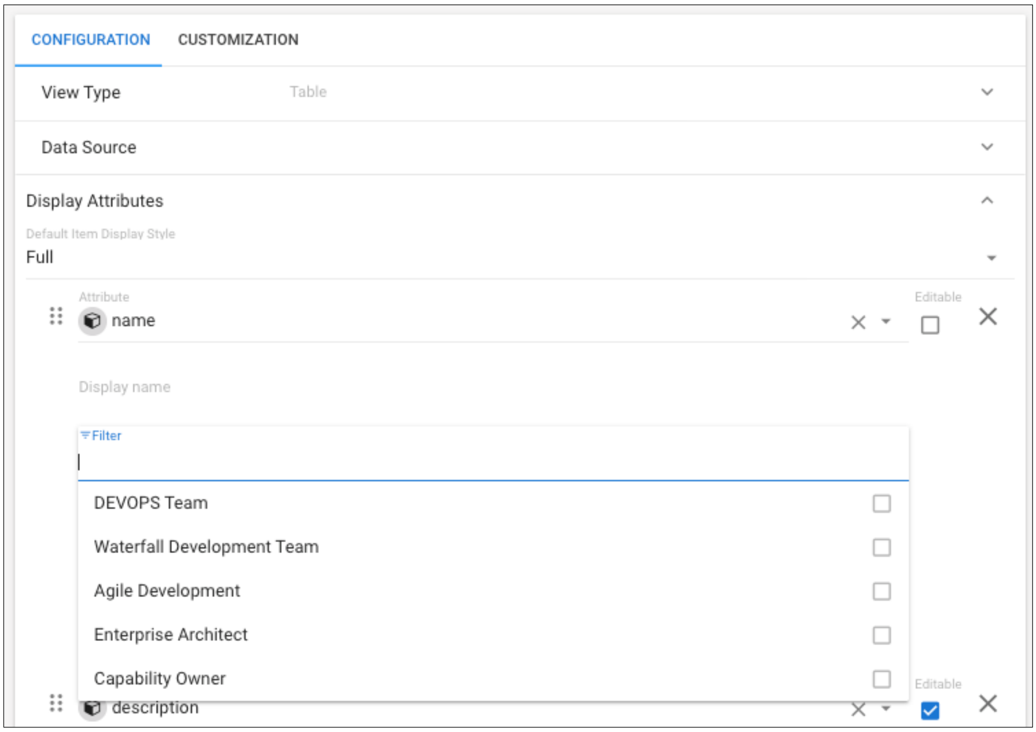
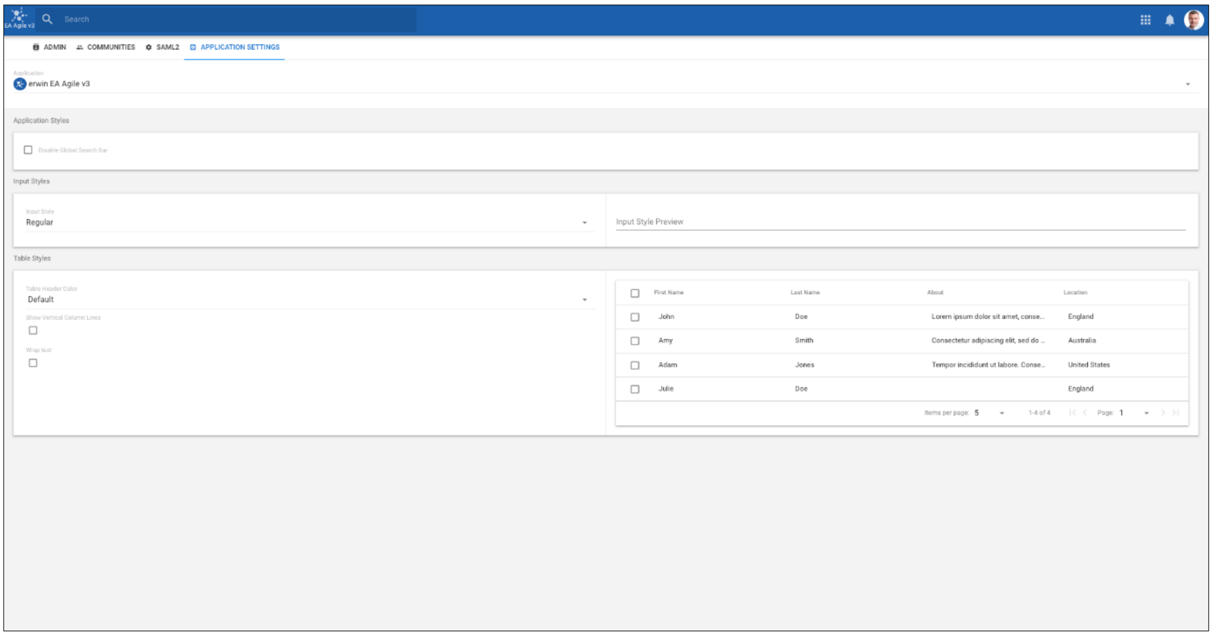
Table
Name
[EA]MyCapabilities_Issues
Icon
Color
Description
Display name
My Issues
Default for erwin EA Agile v3
Filter
DEVOPS Team
Waterfall Development Team
Agile Development
Enterprise Architect
Capability Owner


CONFIGURATION
CUSTOMIZATION
View Type
Table
Data Source
Display Attributes
Default Item Display Style
Full
Attribute
name
Editable
Display name
Filter
DEVOPS Team
Waterfall Development Team
Agile Development
Enterprise Architect
Capability Owner
Editable
description

Application Settings

Users can set global application styles in the Application Settings tab



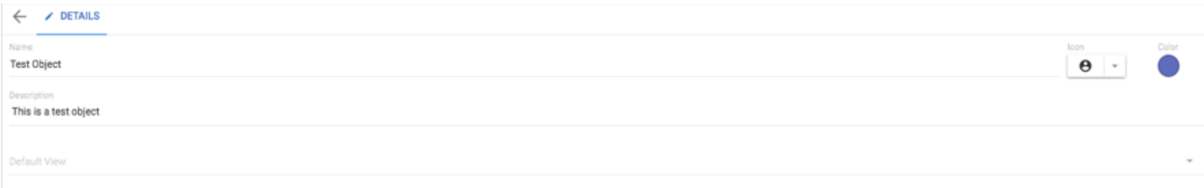
Options available are:

- 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.

Object Types

How Do I Add A New Object Type?

1. Go to System then Object Types
2. 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'



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

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.

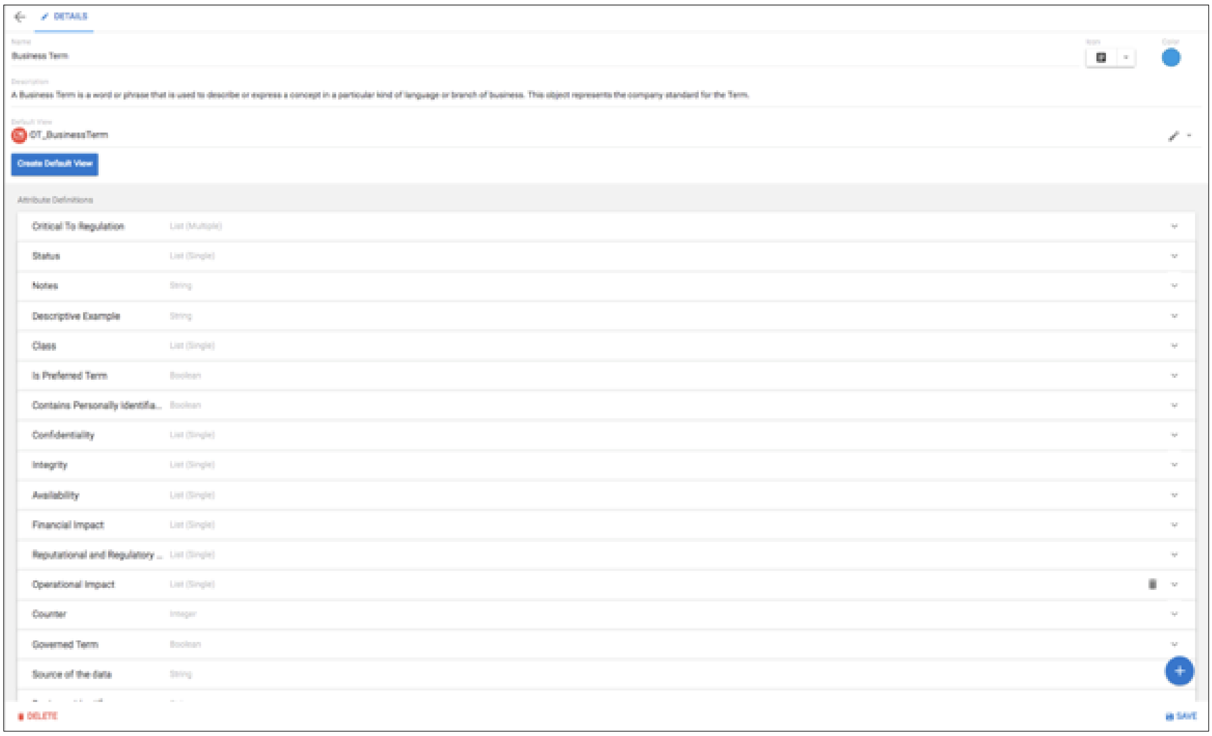
How Do I Add an Attribute to an Existing Object Type?

Available Attribute Types

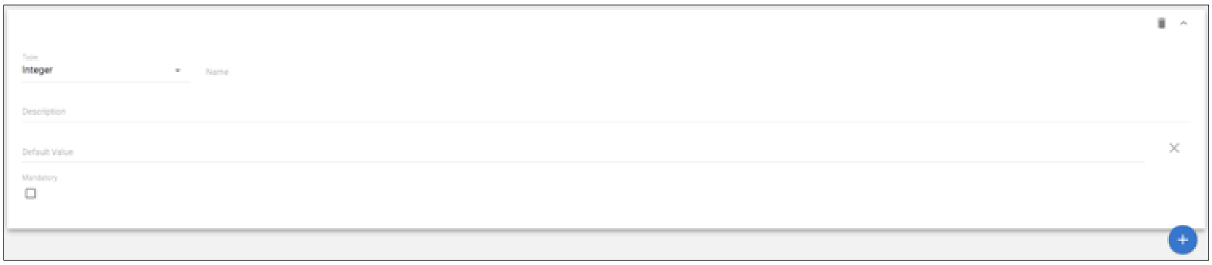
1. Boolean - Simple true/false attribute
2. Integer - A whole number not a fraction
3. Real - Whole number/fraction/positive or negative
4. String - Text with a limit of 255 characters
5. URL - Set a URL for use as a clickable hyperlink or an Item Action
6. Date Time - Set a single point in time
7. Date 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



5. This will bring up a blank Attribute



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.**

Relationships

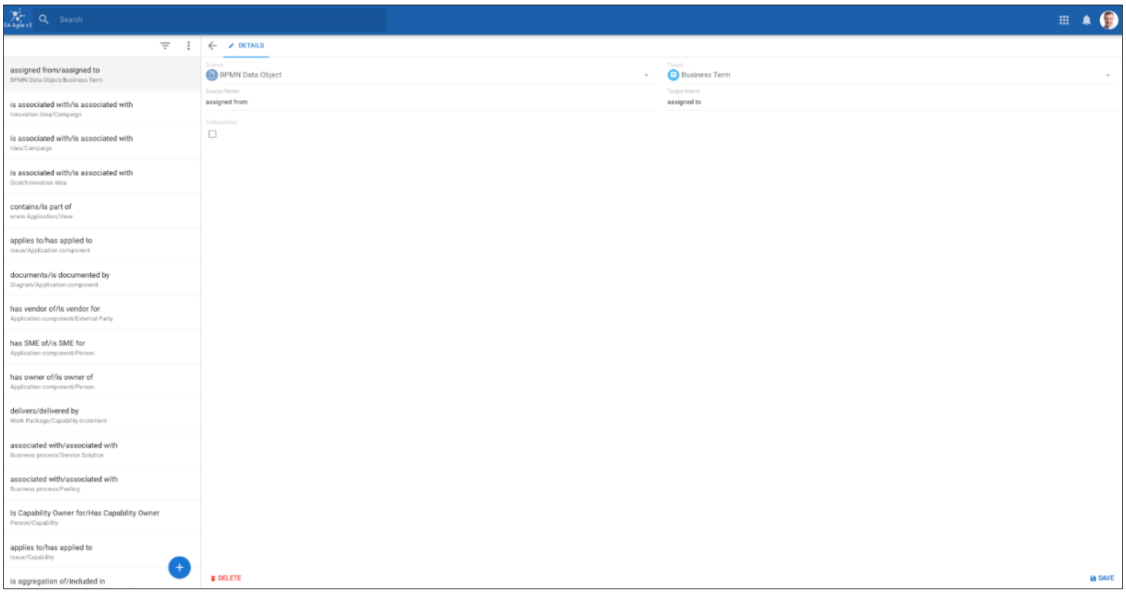
How Do I Create a New Relationship?

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.

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

> 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.



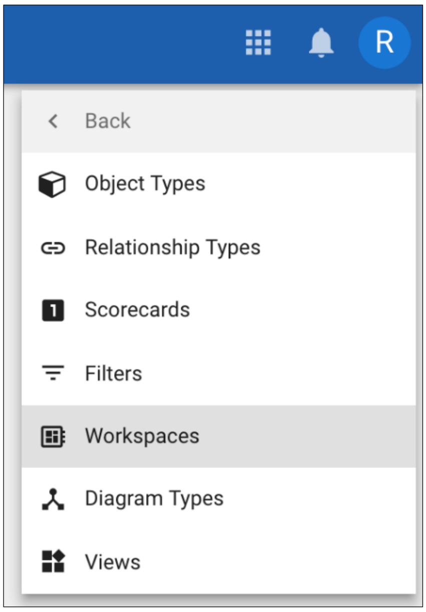
Workspaces

Important information about workspaces includes the following:

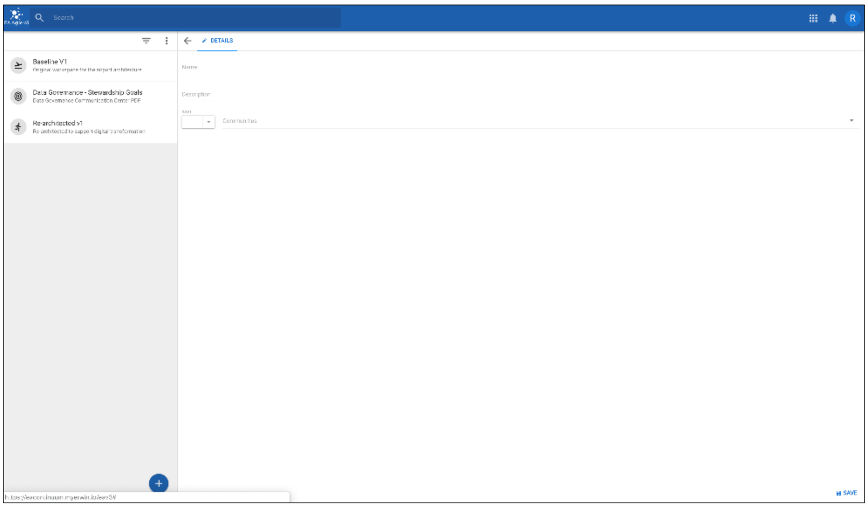
- There is only one default Workspaces for a client area.
- All workspaces in the client area, share the same underlying metamodel.
- Workspaces can be assigned to Communities, for access control.
- Workspaces are blank after creation.
- Model Data can be between workspace via export/import.

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

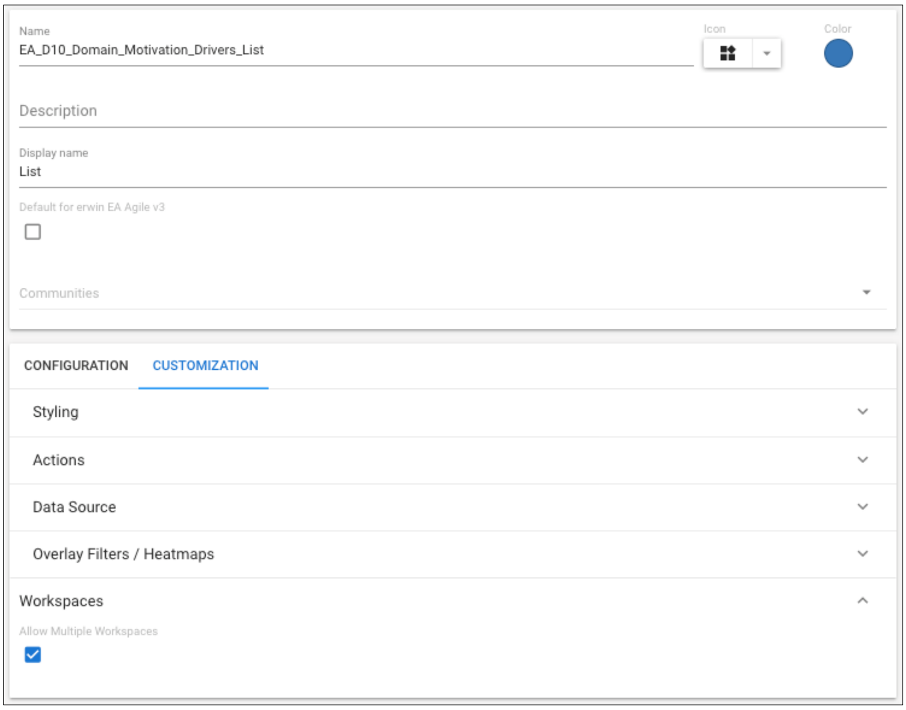


3. Enter a Name, Description & Icon for your new Workspace. You can also restrict a Workspace to a community if you wish.
4. Click 'Save' when complete.

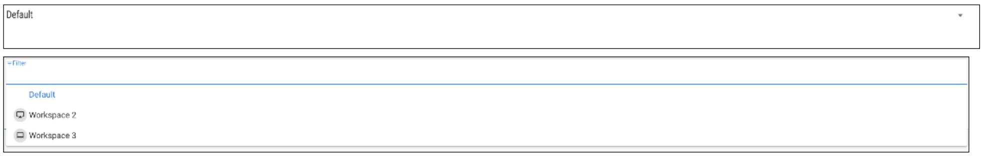
How do I add a Workspace picker to a view?

> 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.

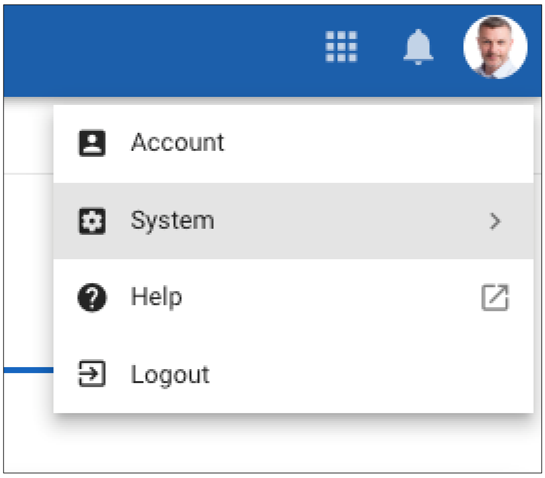


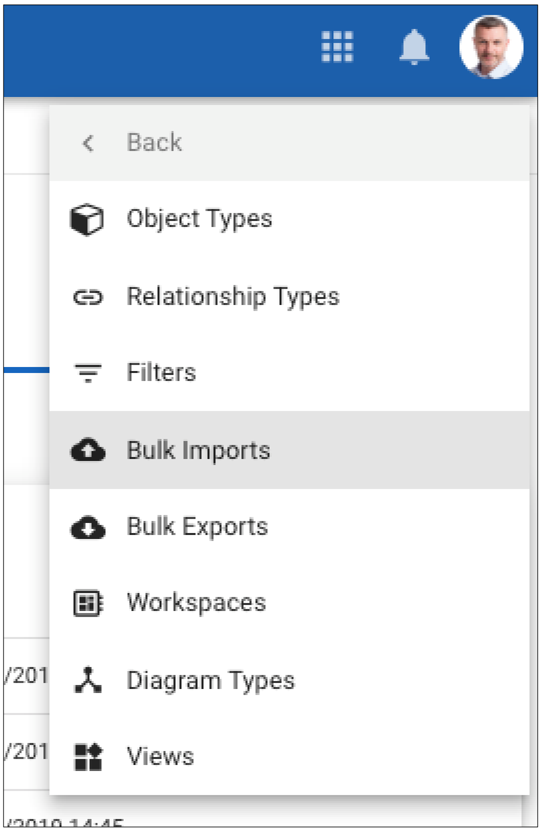
2. Click on the 'Customisation' tab, open the 'Workspaces' accordion and select 'Allow Multiple Workspaces'.
3. A picker will now appear for the chosen view showing you the name of the workspace you are currently working in. Clicking on the picker will bring up a list of workspaces you can select from.



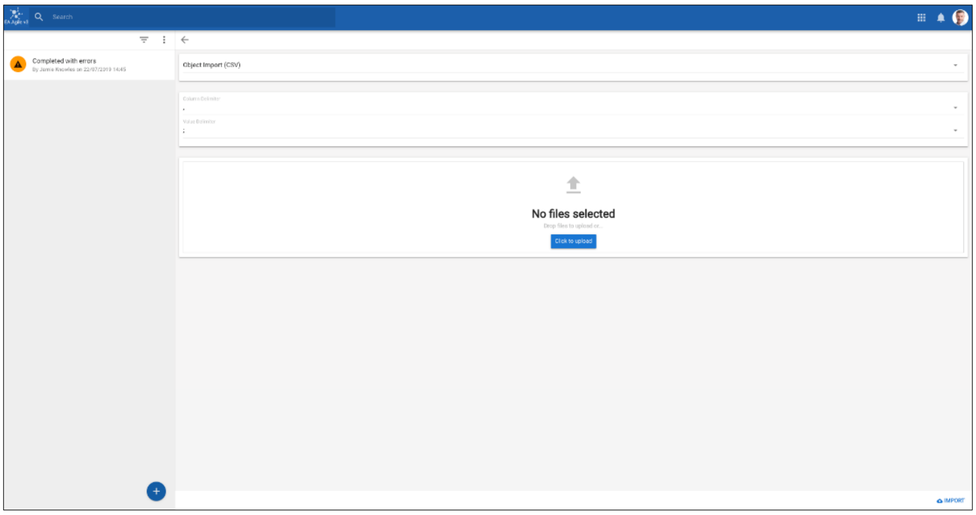
CSV Import

1. Go to the System Menu then select Bulk Imports

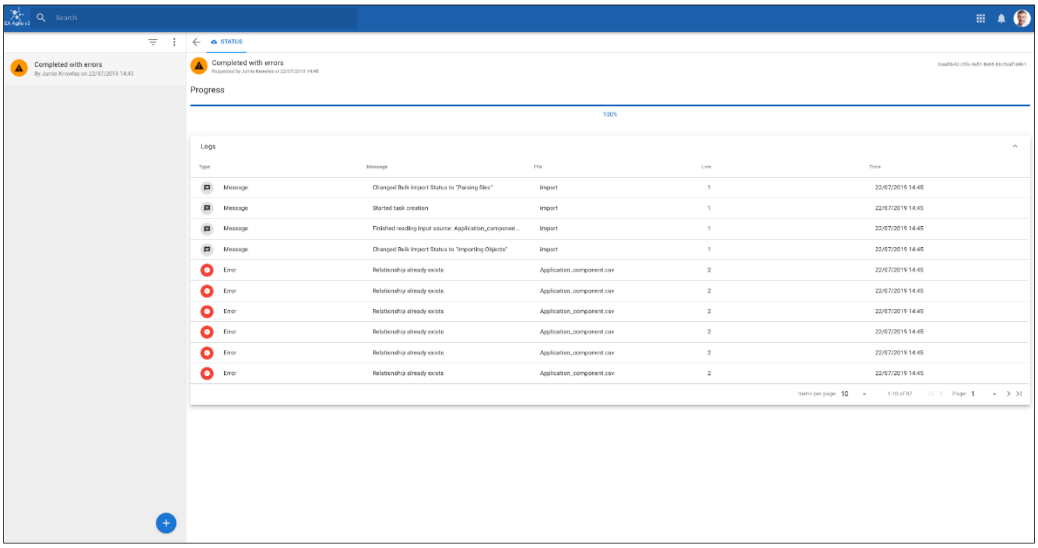




2. You will be presented with a list of all previous imports, if you wish to start a new Import click the blue + button.
3. Select your Column and Value delimiter, then either drag your file into the selection box or click the button to navigate through your file manager.

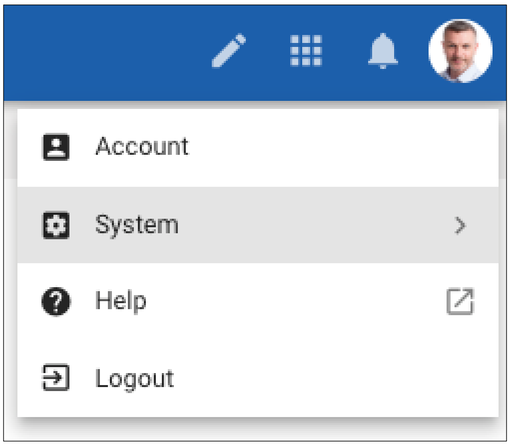


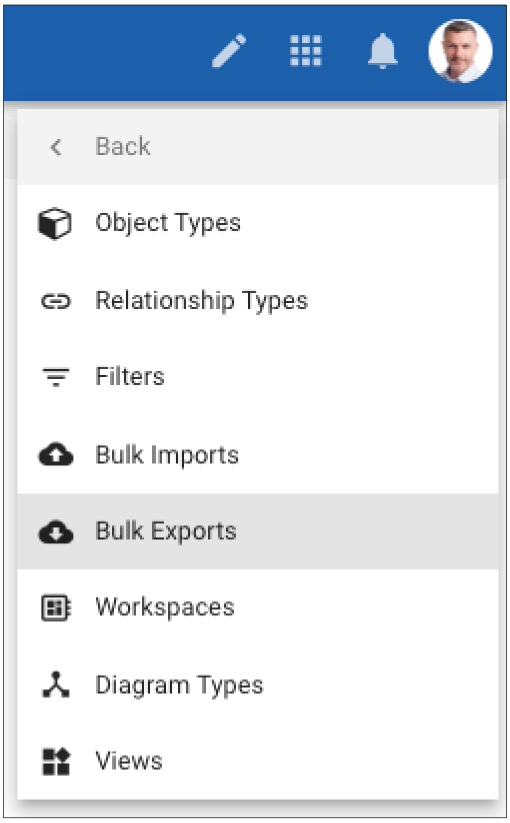
4. Once you have selected 'Import' your file is added to the import queue. You are then able to track the progress of the import and then once completed see a report of what errors have occurred.



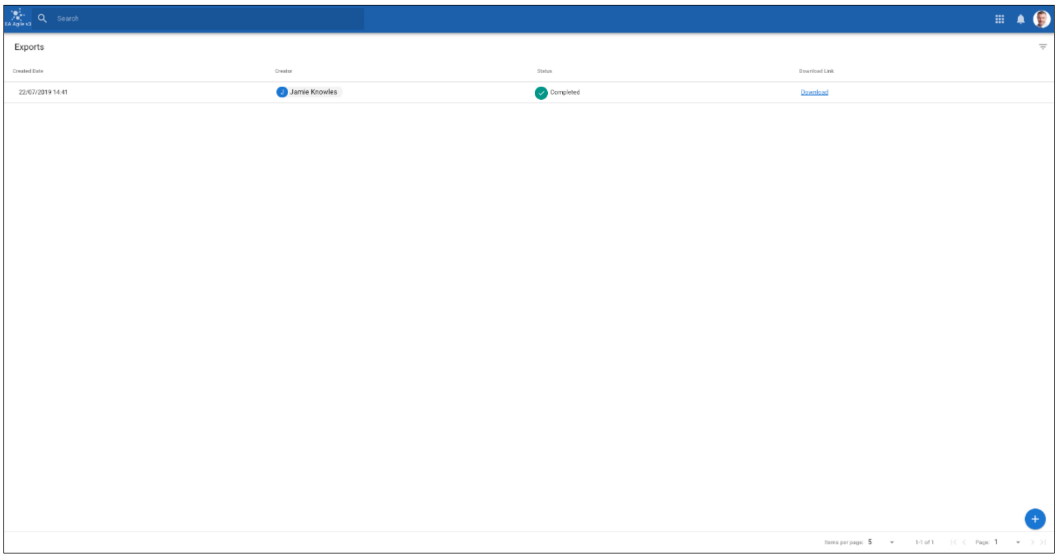
CSV Export

1. Through the system menu navigate to Bulk Exports.

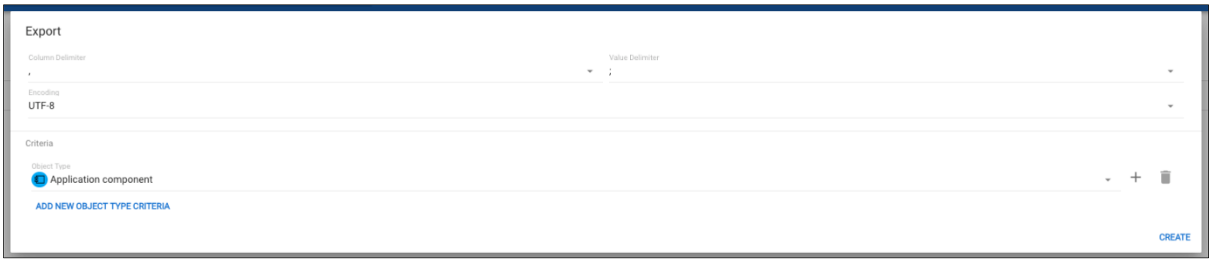


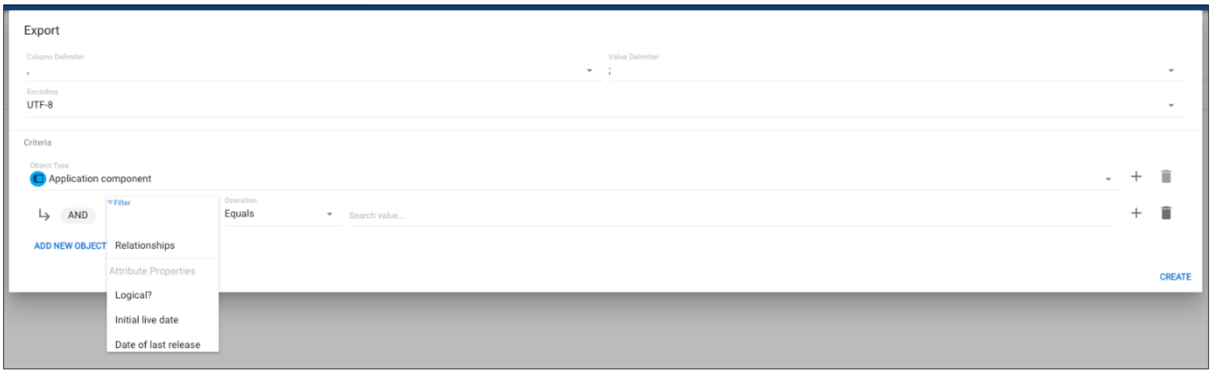


2. You will be presented with a list of all previous exports, their status, and a download link for the file. If you wish to create a new export press the blue + button in the bottom right corner.



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





5. You will receive an email when your export is complete.

Communities

How Do I Create a New Community?

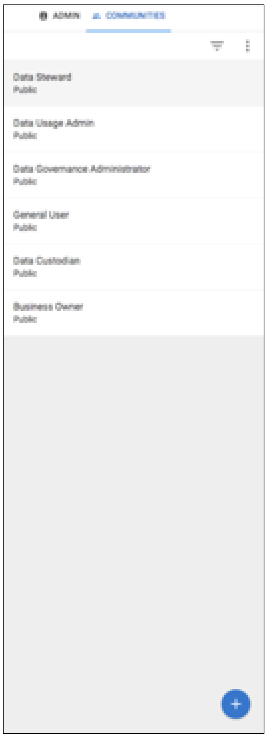
Communities allows Administrators to place Users into groups. Which Community a User is place in will define their experience within the erwin EDGE Platform.

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

2. Click on the ‘Communities’ tab

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



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

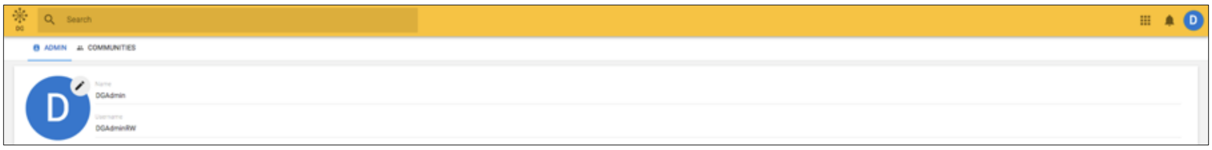
   d. Select the members you wish to be a part of the Community.

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



2. Click on the ‘Communities’ tab

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.

   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

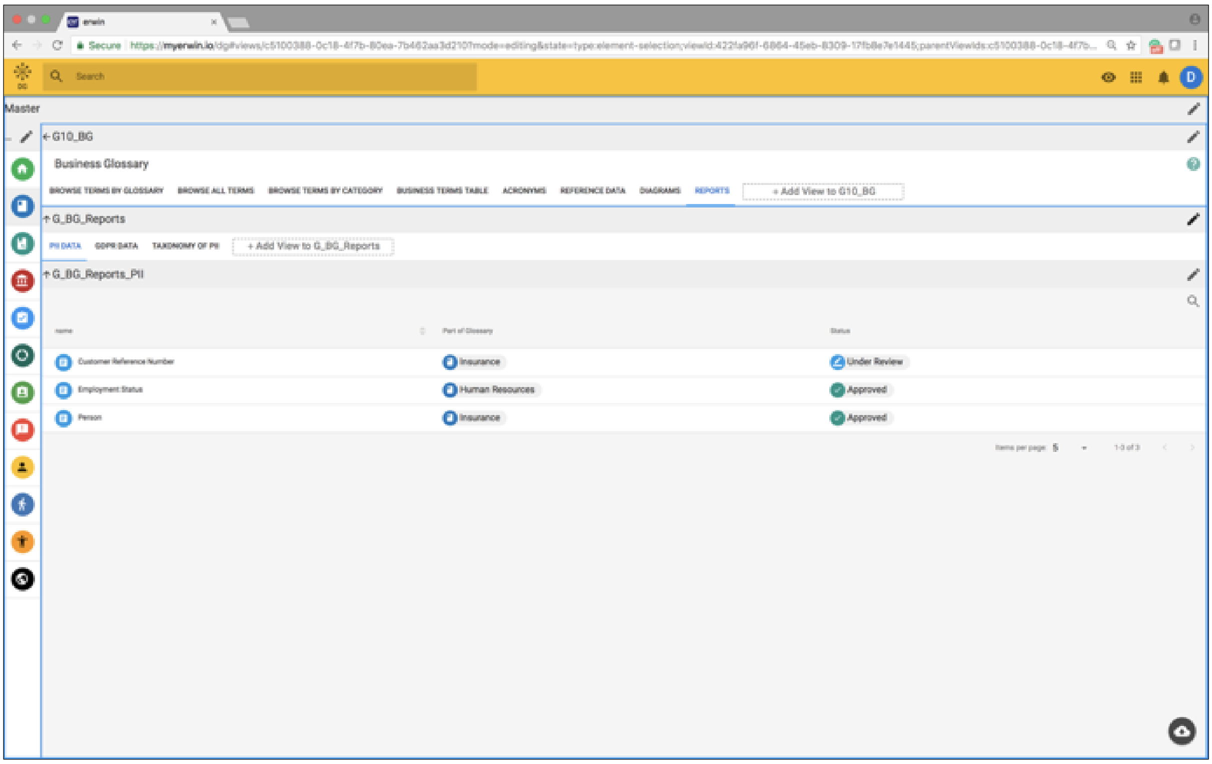
5. Click ‘Save’ in the bottom right of the screen.

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?

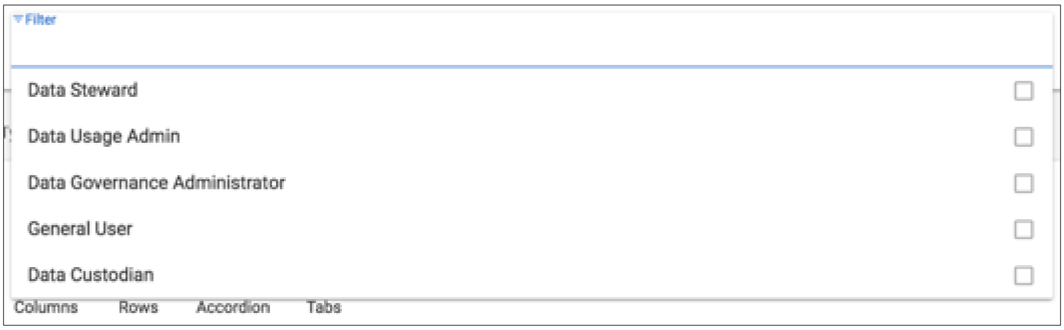
When creating Views within the erwin EDGE Platform you can restrict the view to a certain Community. To allow a view to be seen by all Communities simply leave the field blank.

1. Select the View you wish to restrict by clicking on the pen Icon of that View



2. All Views have a Communities field

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



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

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

Registering a new user of EA Agile

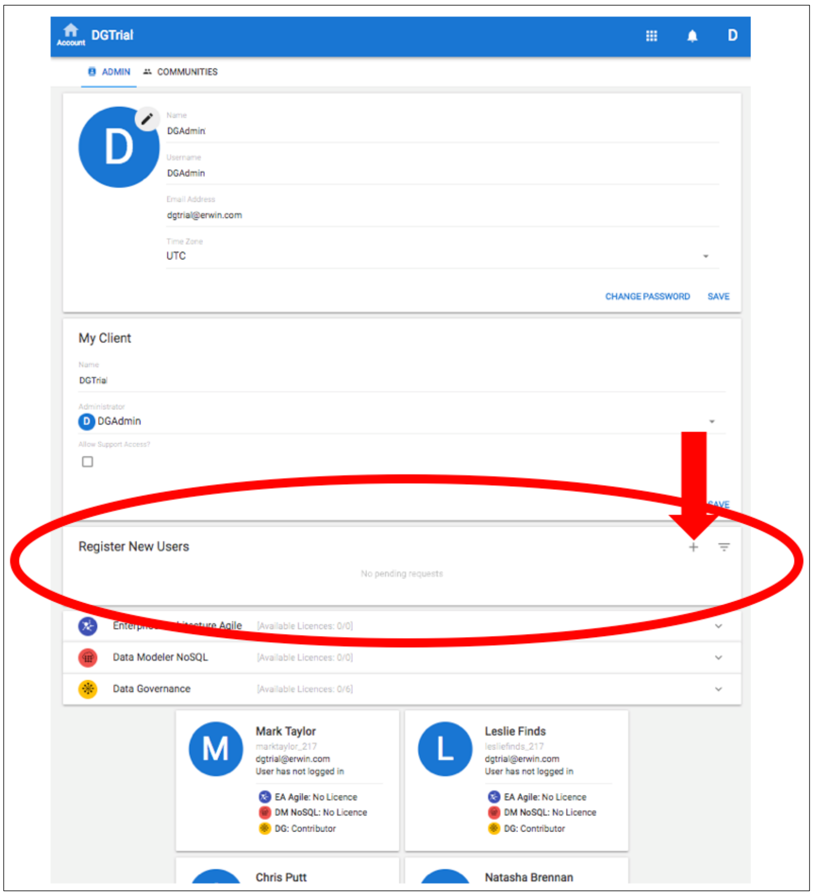
For EA Agile there are multiple steps to set up new users. Once you have created a new User you **must** assign them a community & create and allocated a Person Object (please read below for further guidance)

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

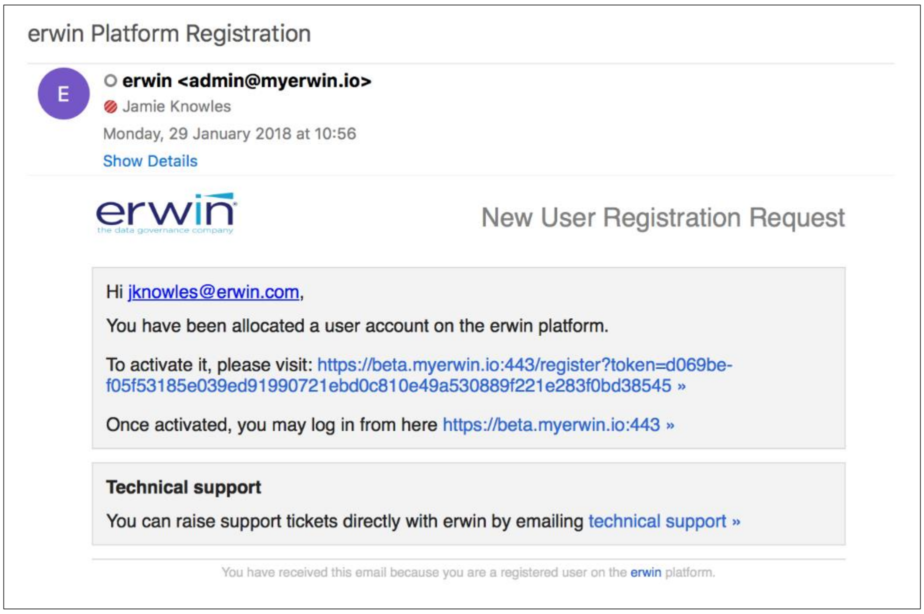
First, log in as the client administrator and go to the account tab.

Find the Register New users button

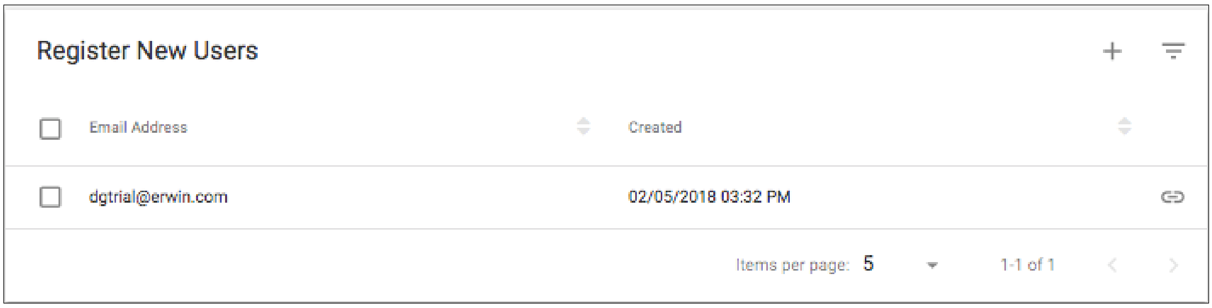


Provide the email address of the user and hit OK.

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



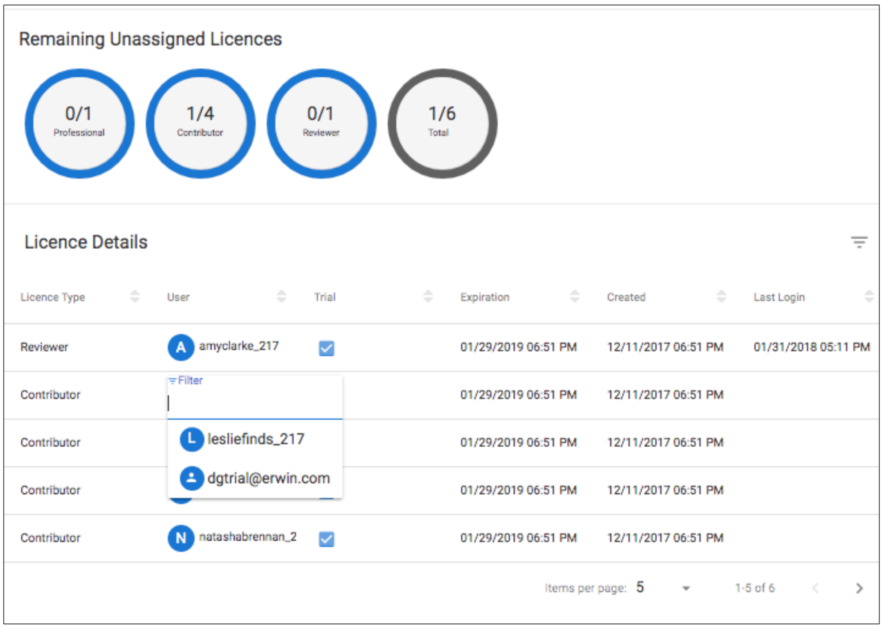
Allocate a License

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.

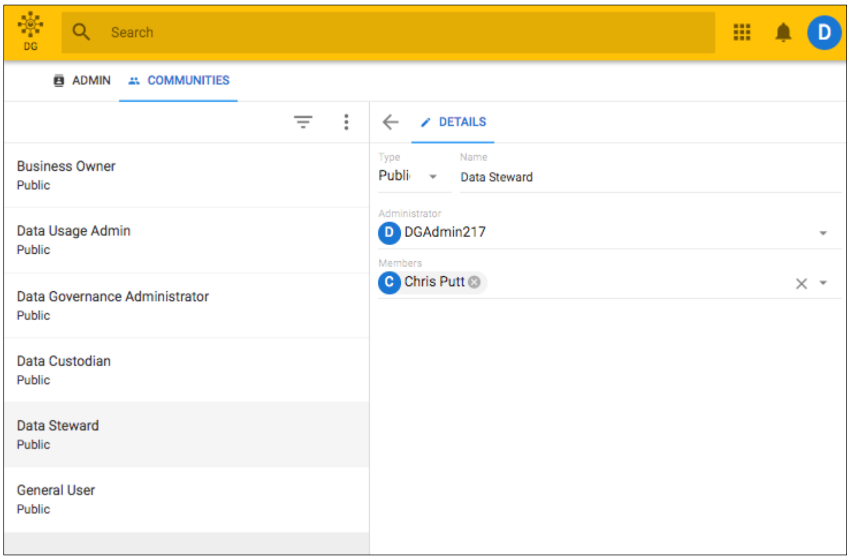
In the product you are assigning licenses for find an available slot and allocate the user. Only users with no license appear in the dropdown.



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



Select the community you wish to add users to.

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

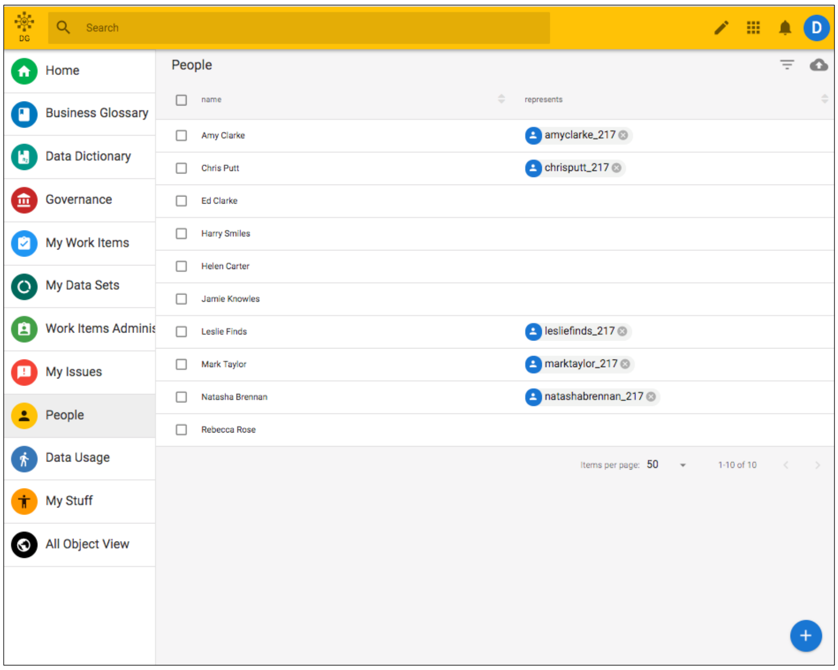
Create and allocate a person object (only for active contributor roles)

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.

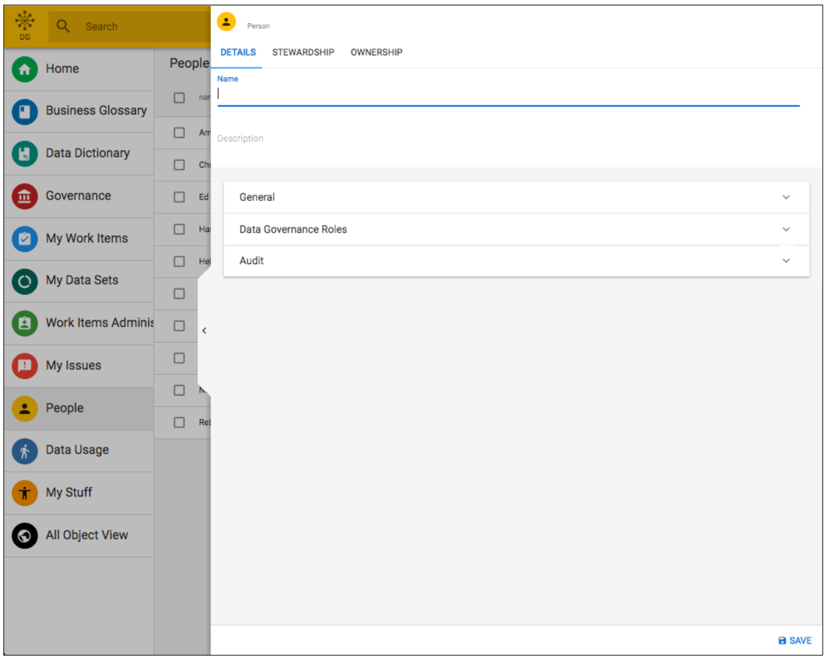
Go to the 'People' tab.

Hit the + sign to add a new Person object

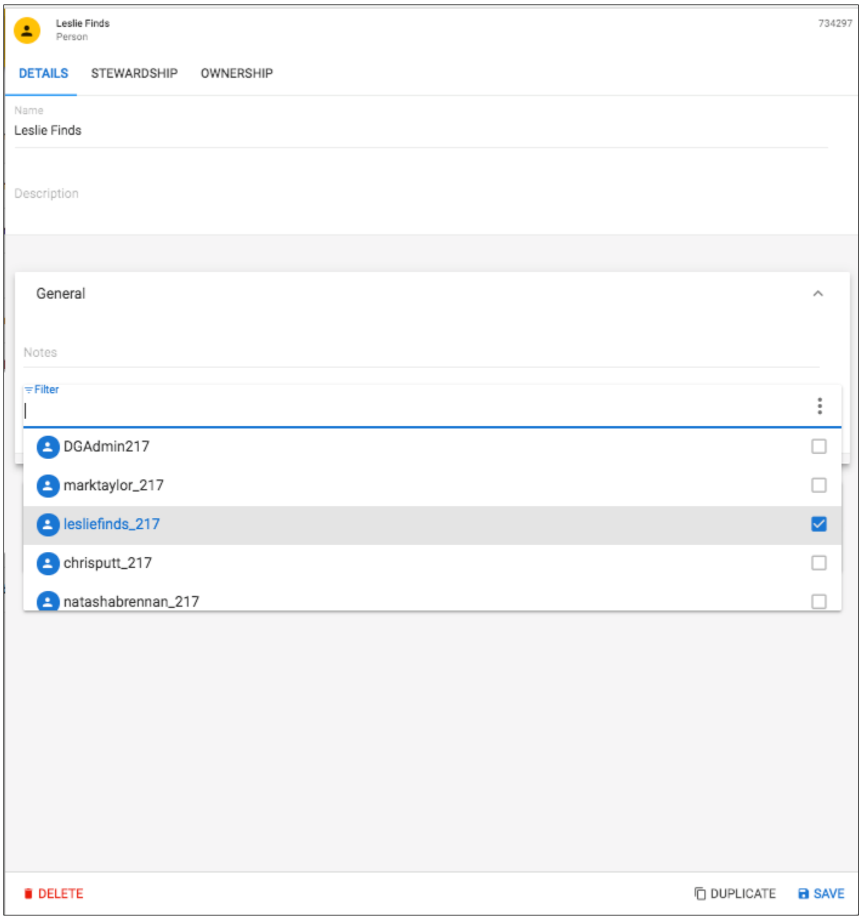


Populate the basic details for the person

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



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



The user is now set up and ready to go!

Data Source

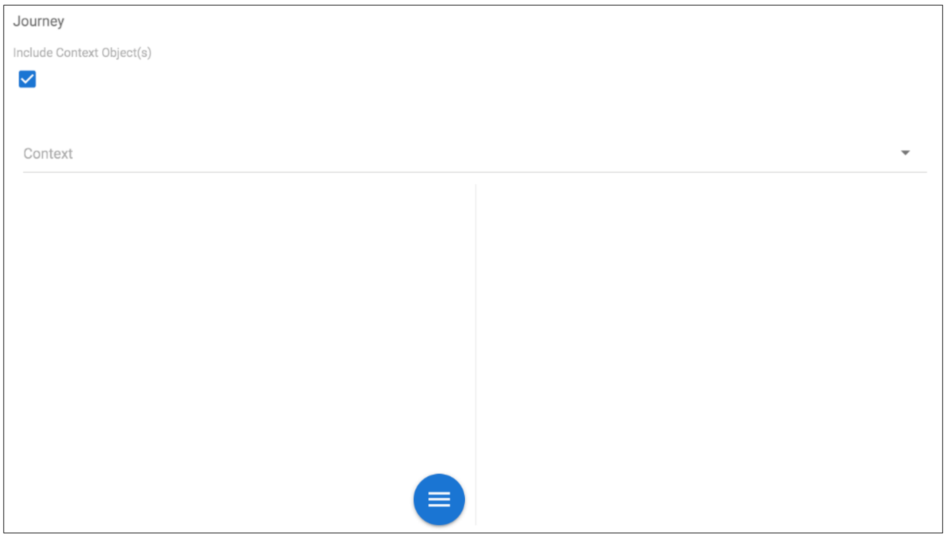
Journeys

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.

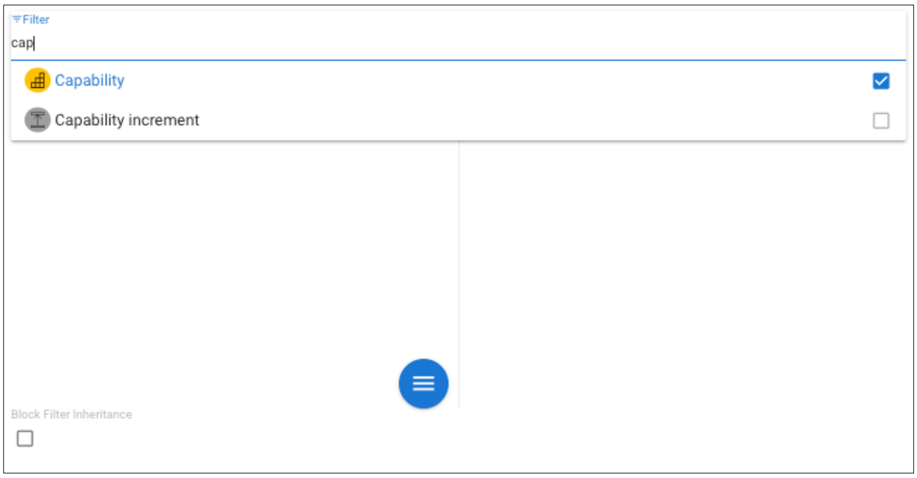
How To Create a Journey

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

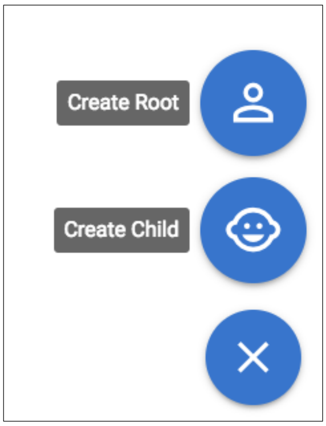


1. You will need to select an Object Type for your Journey to take context from
    a. Click on the Context menu
    b. Select the Object Type you'd like your Journey to take Context from (You can select multiple)



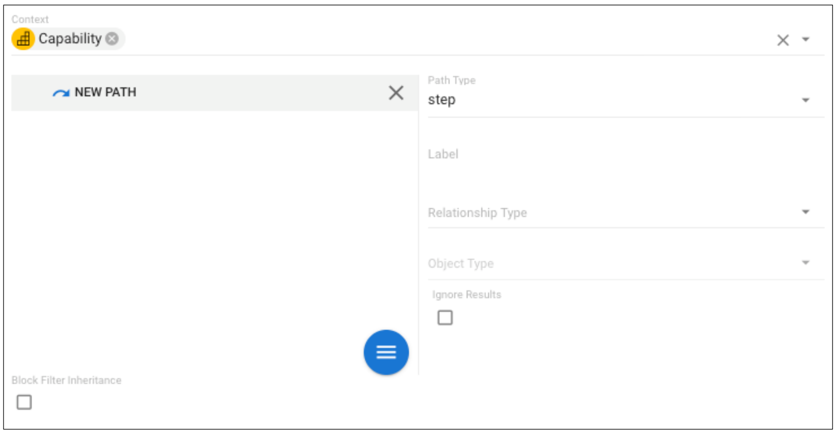
c. If you want to display the Context Object select 'Include Context Object(s)'

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



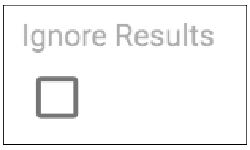
a. First, choose your Path Type. You have 3 options to choose from:

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

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.
6. 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

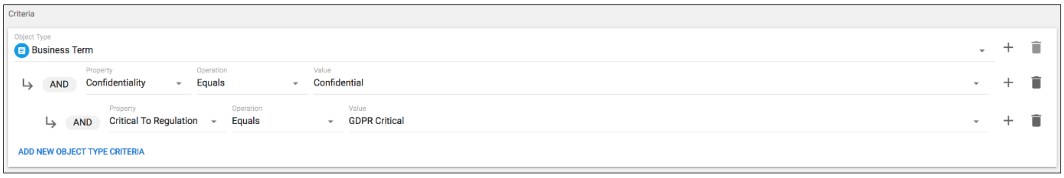
i. 'Is Object' – Equals, Does not equal

ii. 'Use Filter' – Is in filter, Is not in filter

iii. '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



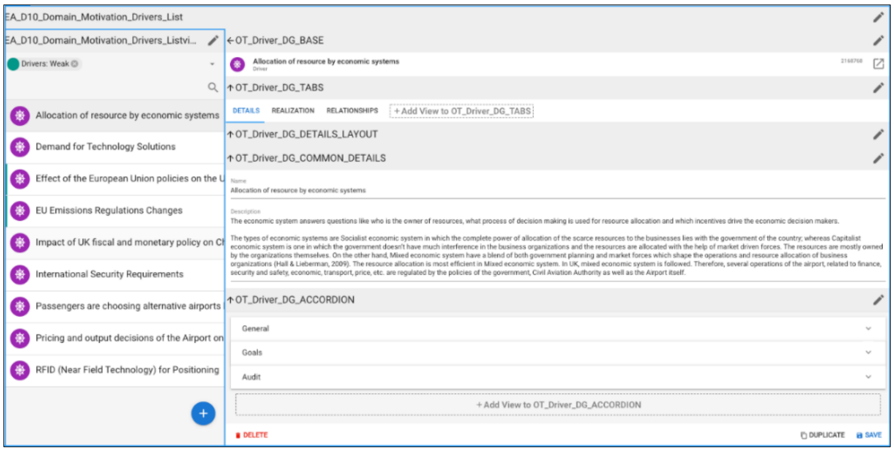
This step can be repeated for additional criteria.

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'.

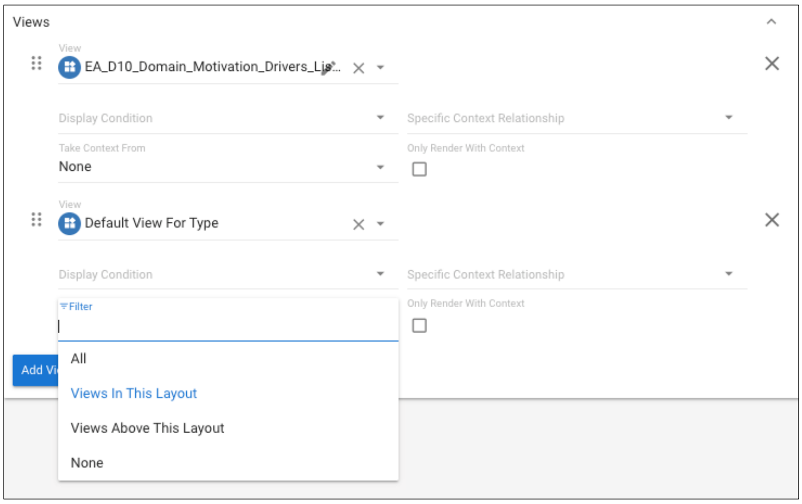
Context

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.



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



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

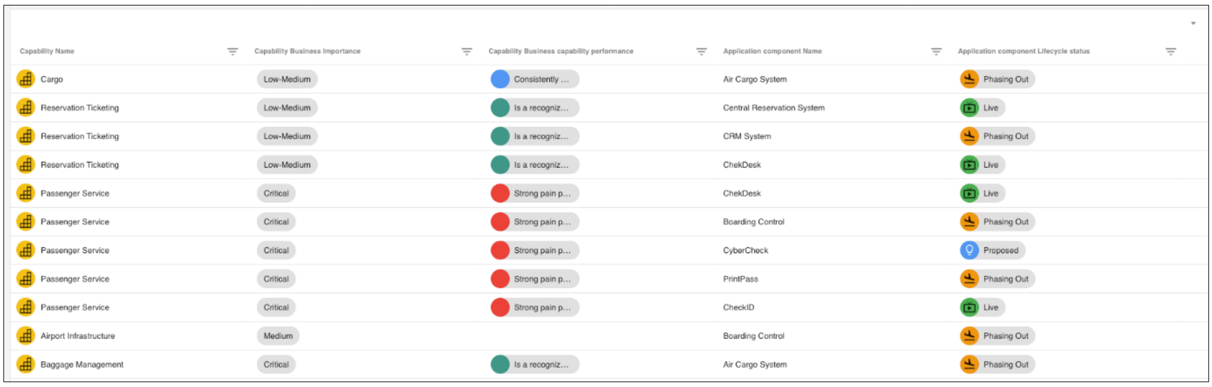
   e.g. The list of Objects above requires context from the list of Glossaries.

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

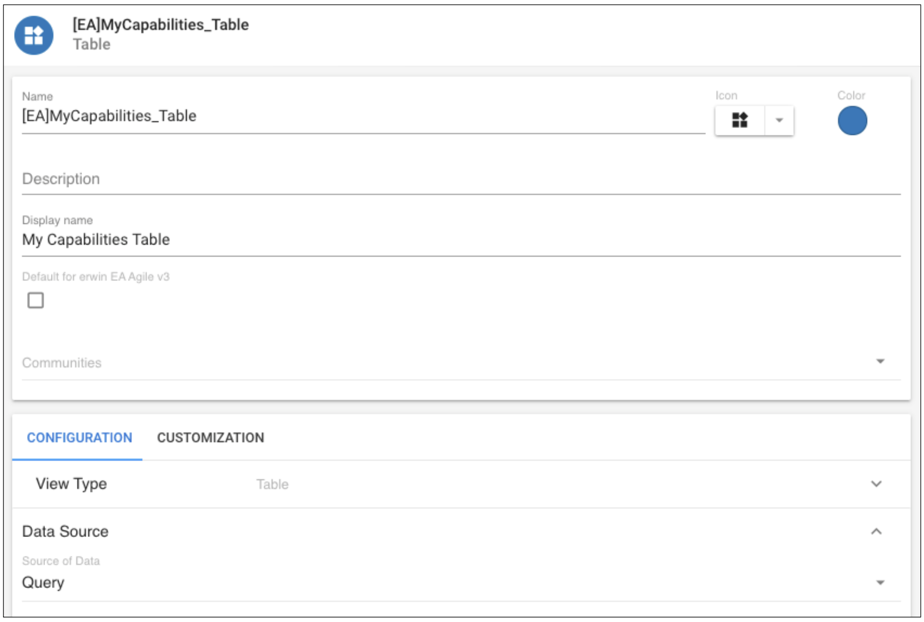
Queries are an advanced data source that can be used within Table Views. Unlike the 'Journey' data source they allow users to configure a journey through the metamodel and add properties for each Element of the journey. They also benefit from being more performant than the other data sources and allow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



Capability Name	Capability Business Importance	Capability Business capability performance	Application component Name	Application component Lifecycle status
Cargo	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	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	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

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

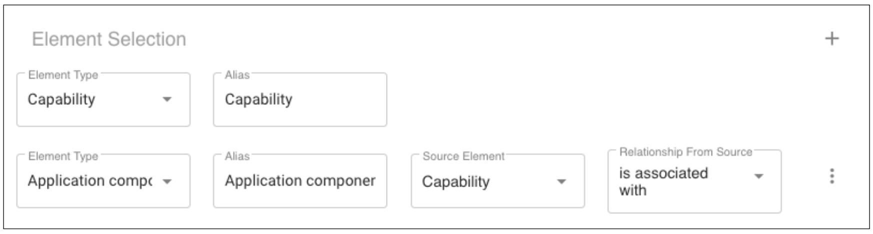


figure b

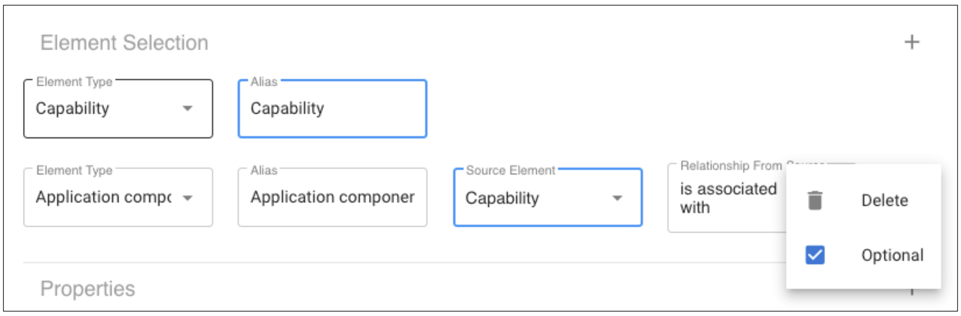
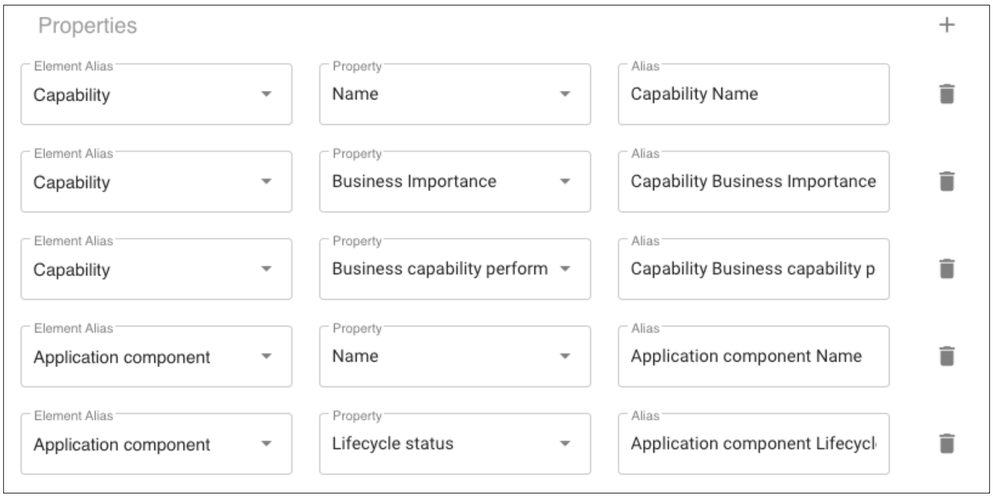


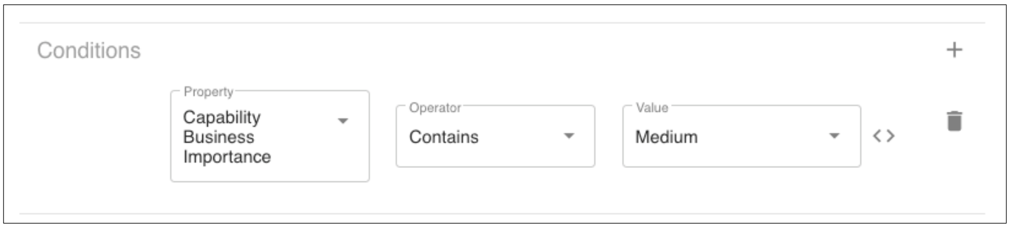
figure c

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.



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



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.

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.

New View

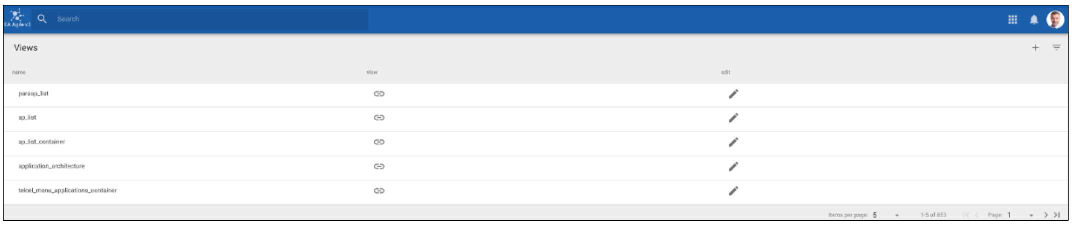
How Do I Create a New View

> 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.

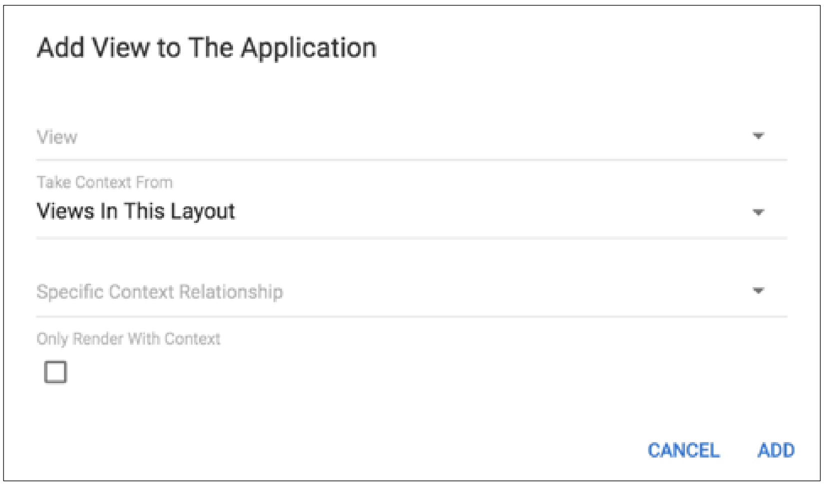
The following instructions explain how to create a View on the erwin EDGE Platform. Every View involves the same basic steps found below. Once you have followed these intial steps you will need to configure the type of view you have selected.

Through the system menu

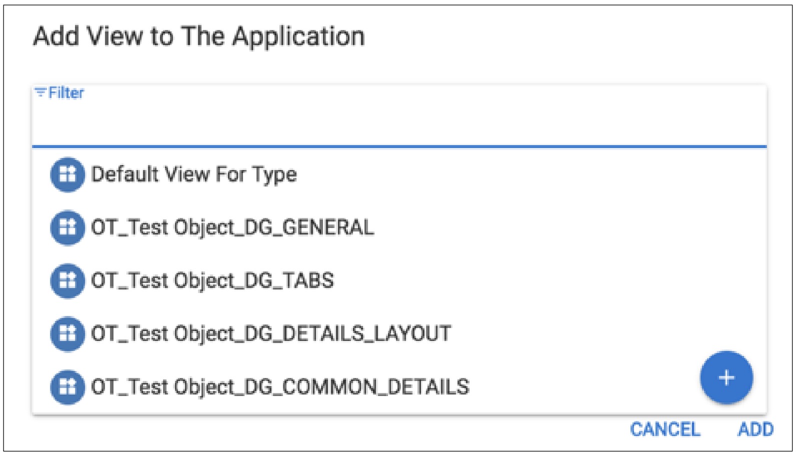
1. Go to System > Views
2. Click on the + button in the top right corner



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

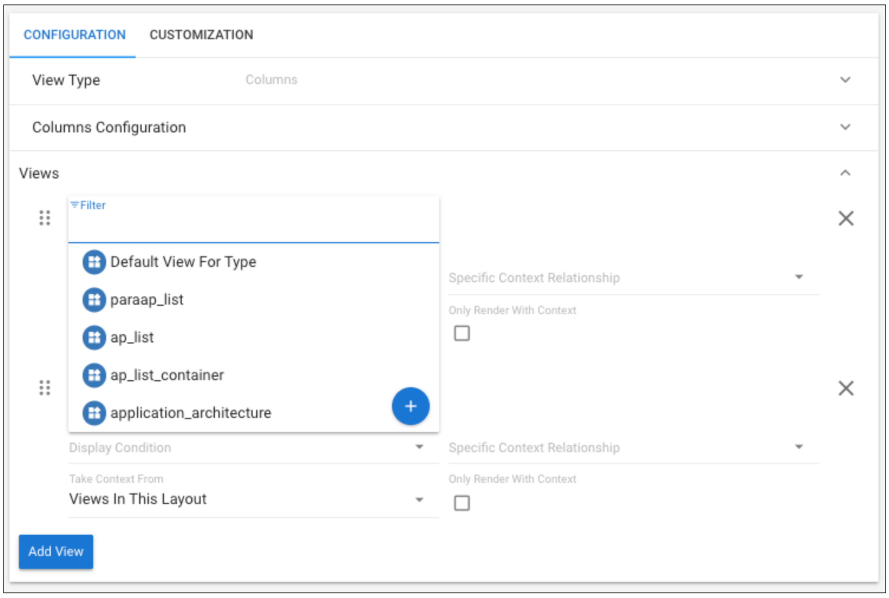


5. Click on the View field and click the blue + button to open a New View panel



Through a view selection list

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

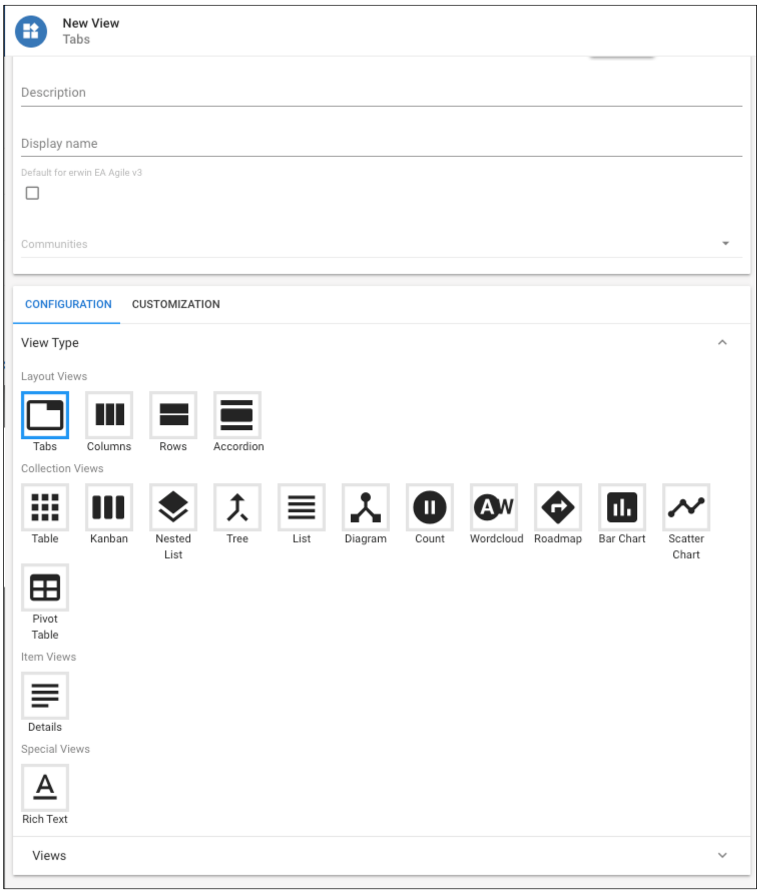


2. This will open up a New View panel.

Configuring the New View

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.

1. 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



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.

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

Columns, Rows, Accordion, Tabs

Collection Views

Kanban, Roadmap, List

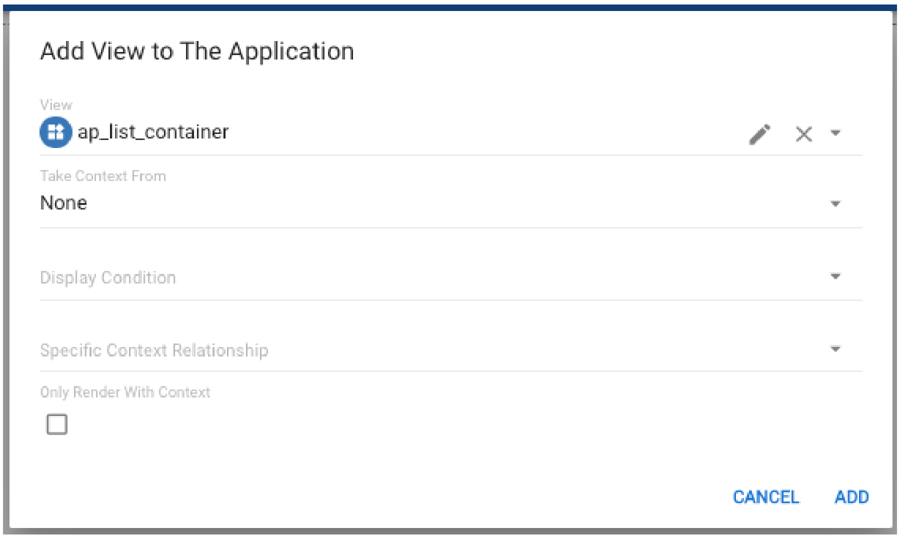
Details

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.



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.

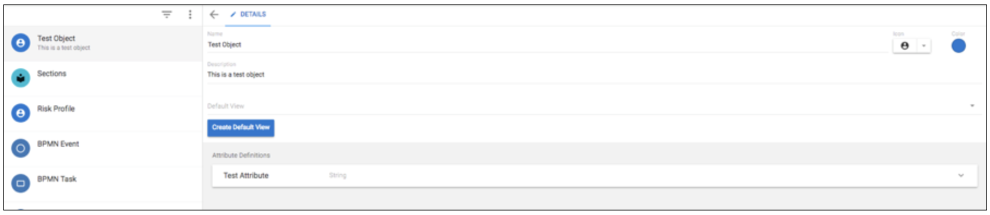
These can be added where-ever a view is added to the application and use filters.

Default View

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



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

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

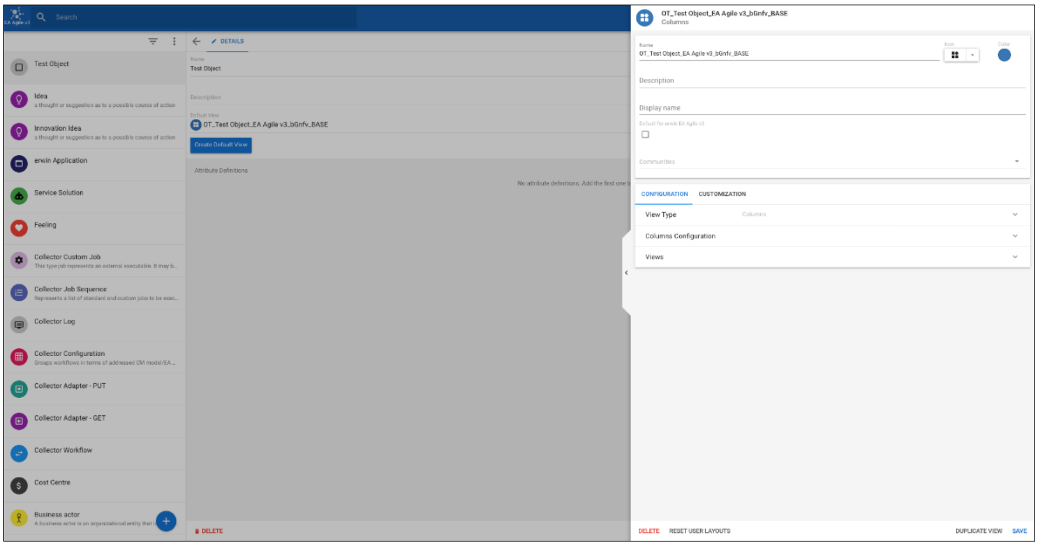
The erwin EDGE Platform has now created a default view for your Object Type, so you are able to view it and its Attributes throughout the system. Each default view consists of a 'Details Tab' which will include basic information about your Object and an Accordion view of General Attributes and Audit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

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

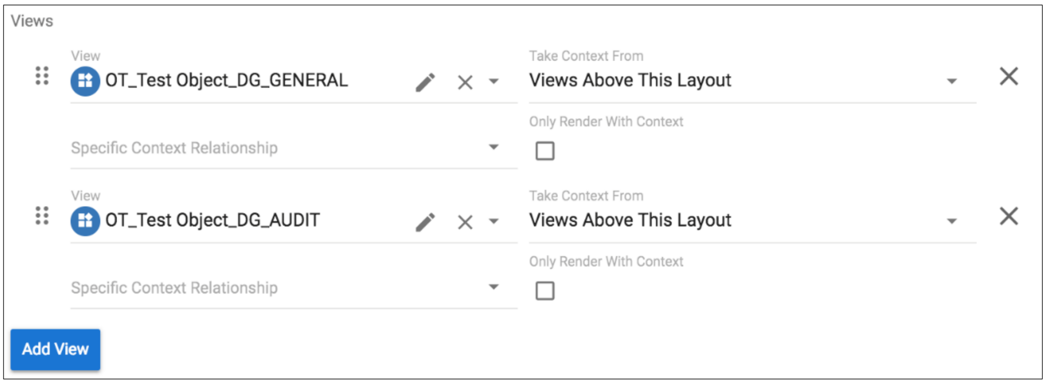
The default view on the erwin EDGE Platform provides a basic set of views displaying basic Attributes. In order for a default view to provide value you will need to configure it to display information relevant and important to you.

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

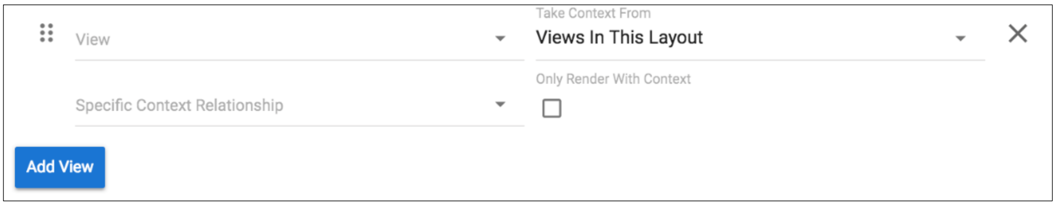


2. Continue through Views by clicking on the Configuration Icon until you reach the Accordion View



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



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.

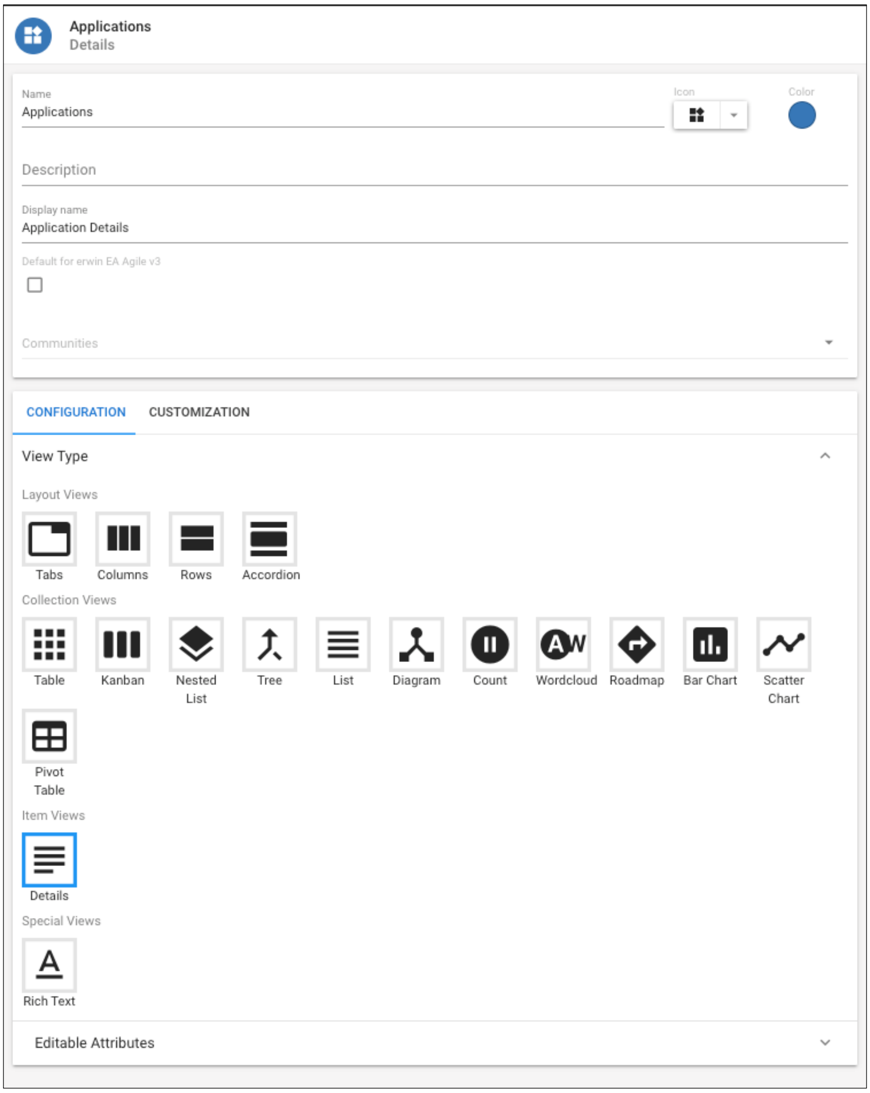
Details View

How Do I Create a Details View?

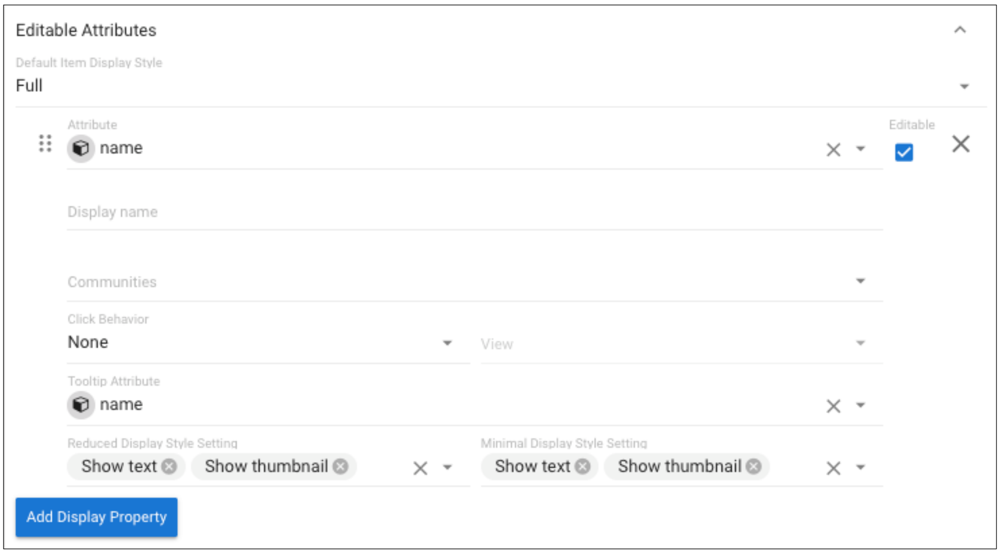
Before starting you must read and follow the instructions in the ***New View*** help page.

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.



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'



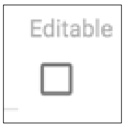
3. You now need to select your Display Attributes. These are the Attributes you want to have in your Details View

   a. Generic Attributes are Properties that are in all Object Types.

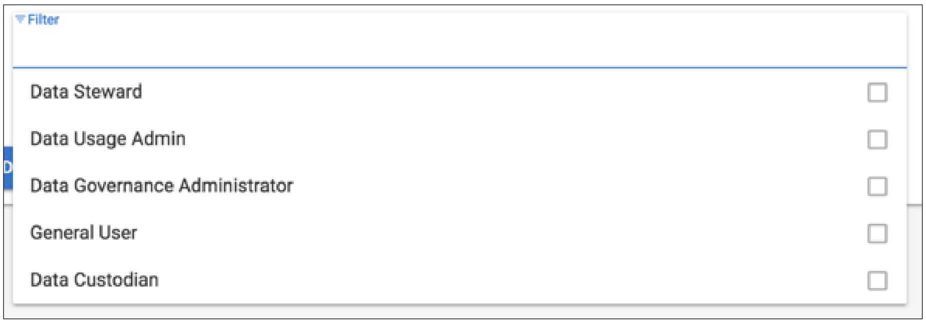
   b. If you want to display Attributes that are only of the Object Type you're creating your display view for. You can either select the Object Type manually or search for a specific term

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

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

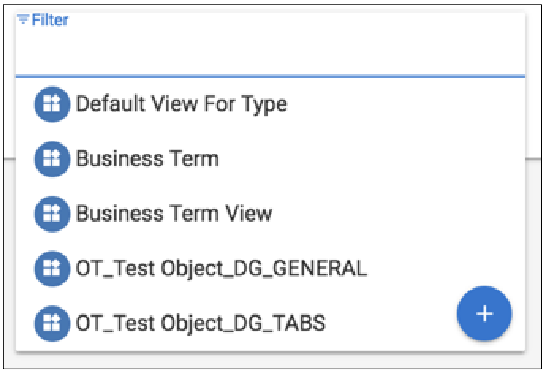


5. To restrict the Attribute to a Community, click the ‘Communities’ field. If you wish the Property to be viewed by all leave this field blank



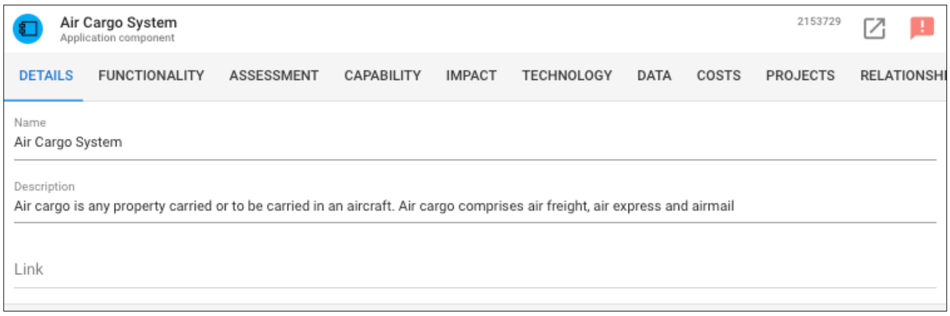
6. You can now choose whether the Attribute has a Click Behaviour. There are 5 options:
   i. Context:
   ii. None: Nothing will happen when the Attribute is clicked
   iii. Open In Panel: A side panel will pop out
   iv. Navigate To: Redirected to a new page displaying the set view
   v. Open In Dialogue: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

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'.

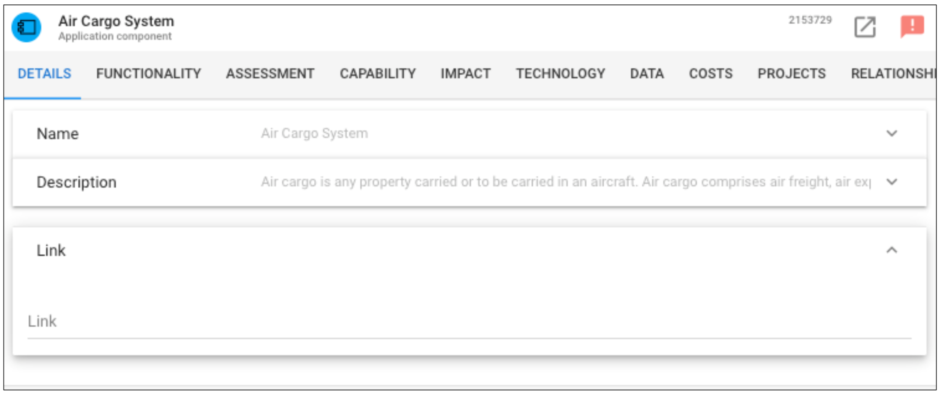


7. Selecting a Tooltip Attribute allows users to select which attribute to display on hover, by default, this is set to name
8. To add additional Attributes, click 'Add Display Property' and repeat from Step 3
9. Once you have added all the Attributes you wish to display click 'Save'

Form style 'Details View'



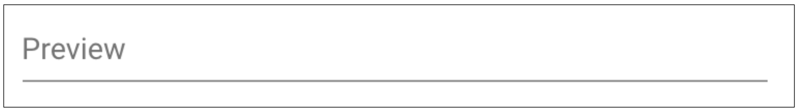
Accordion style 'Details View'



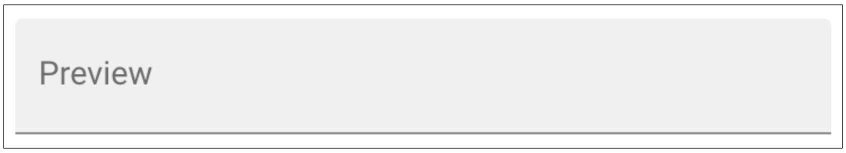
Input Style

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

Default

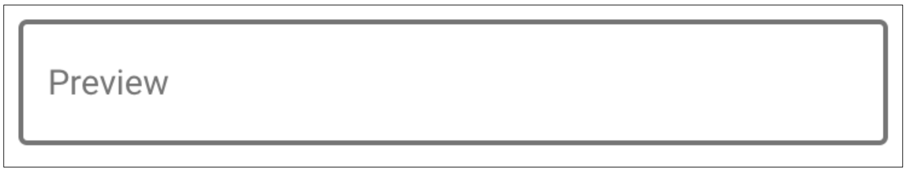


Box

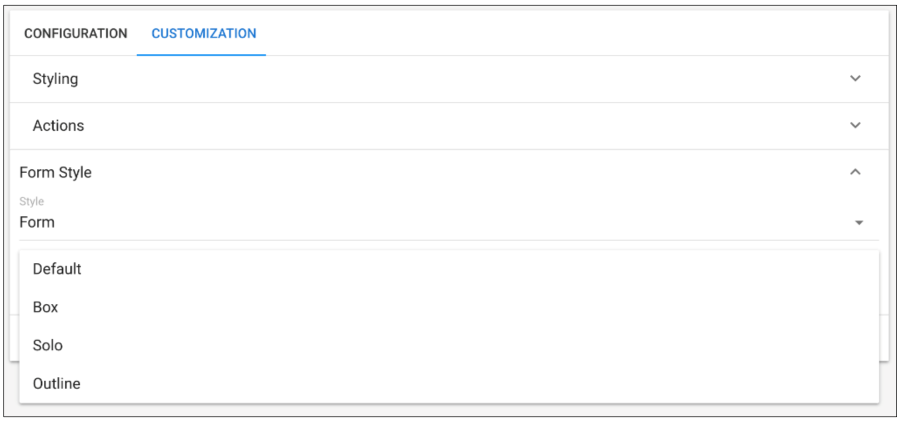


Solo

Outline



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

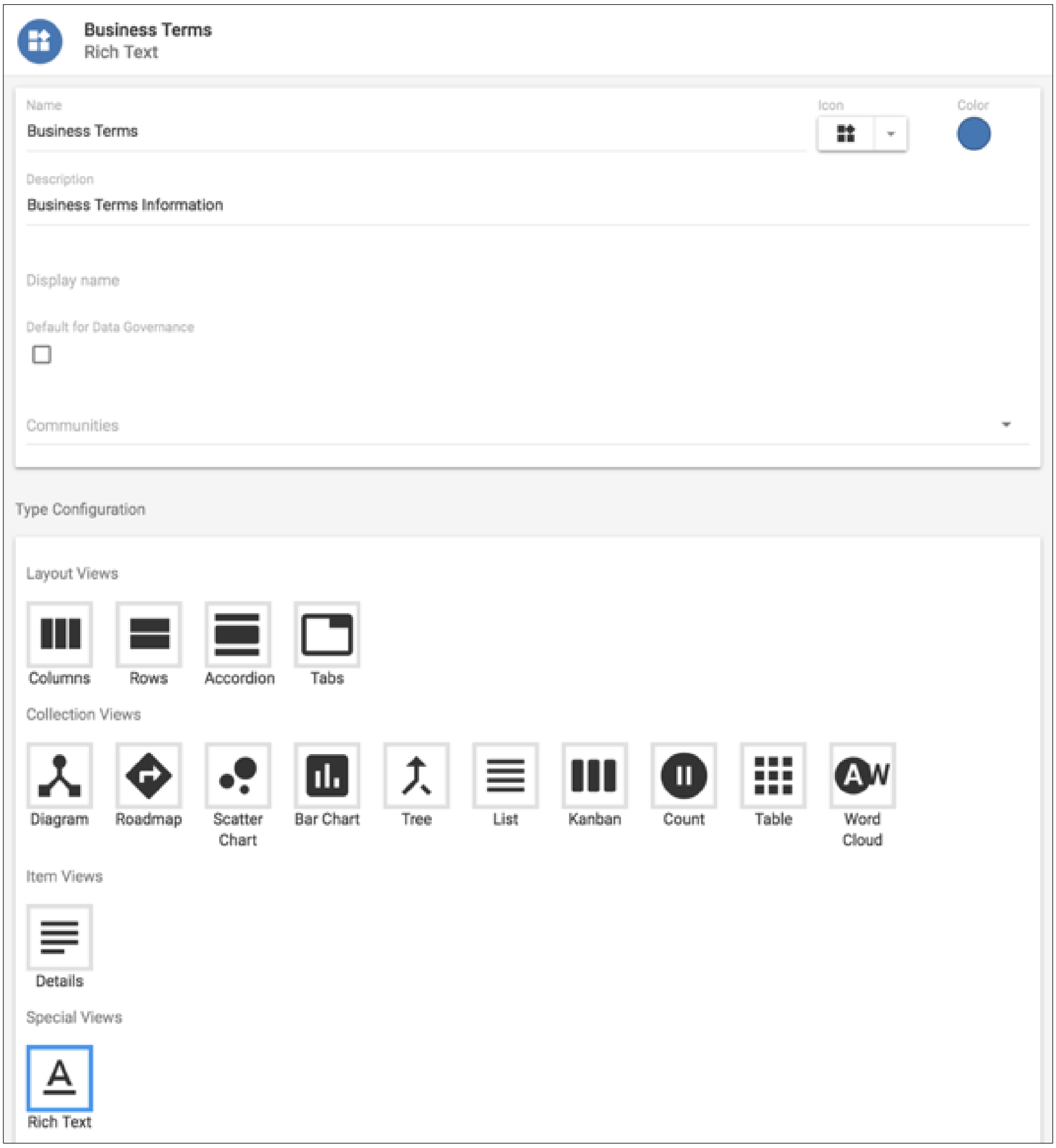


Rich Text View

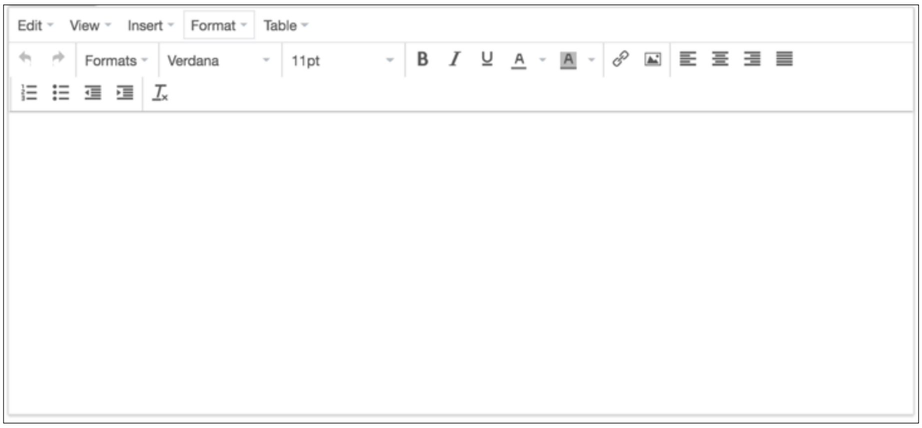
How Do I Create a Rich Text View?

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

1. Select 'Rich Text' from Item Views.



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

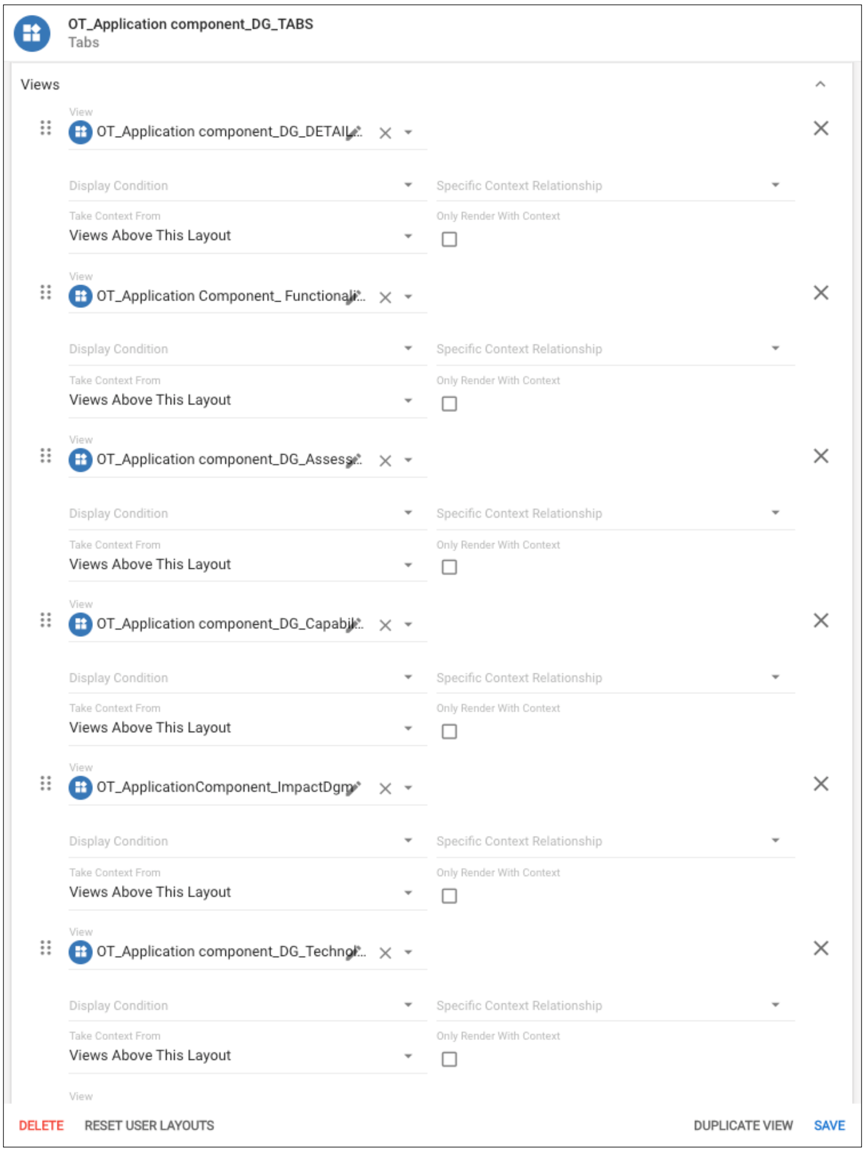
How Do I Create a Conditional View?

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.

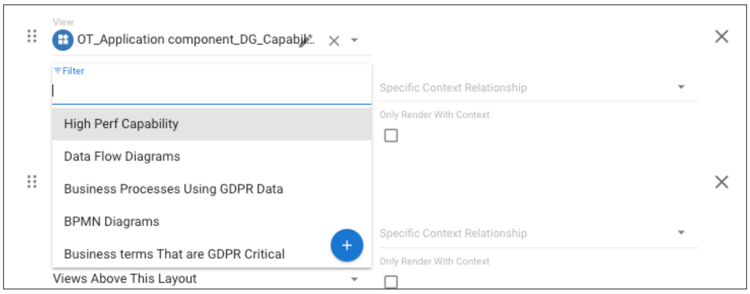
To implement a Conditional View is incredibly simple, all that is required is;

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



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



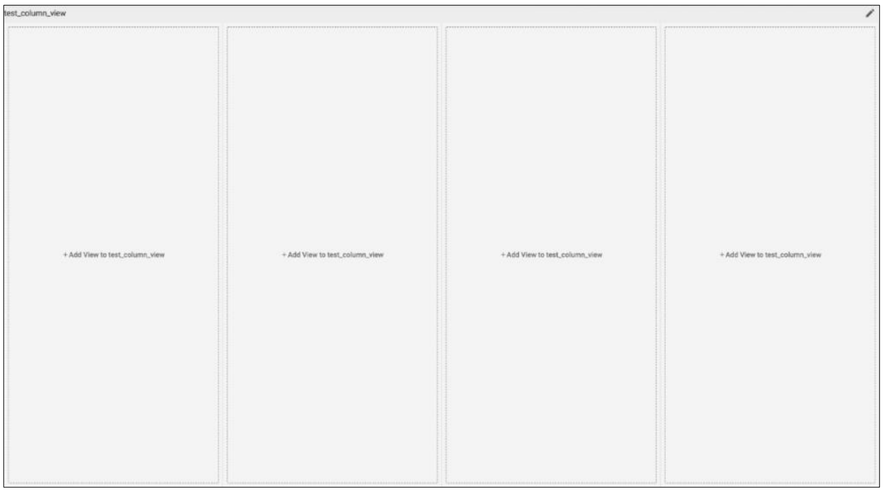
Layout

Columns View

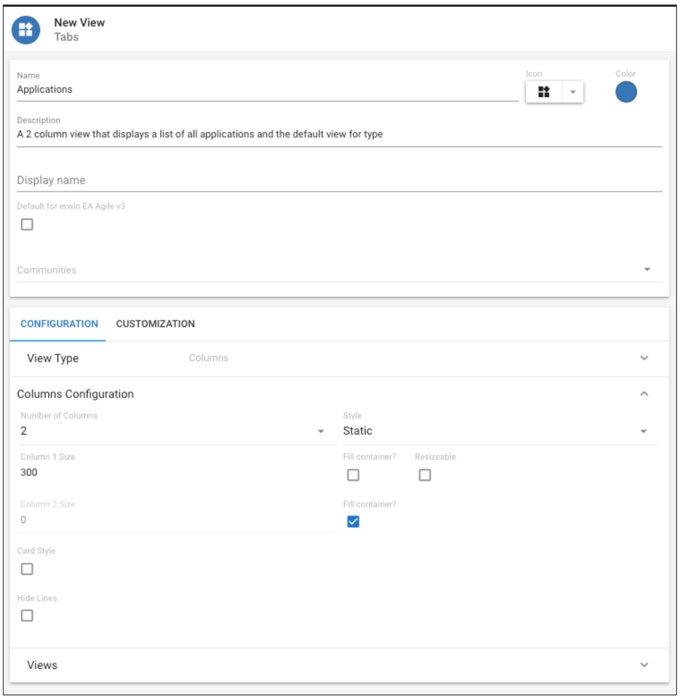
How Do I Create a Columns View

> **!** 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.



1. Select 'Columns' from Layout Views.



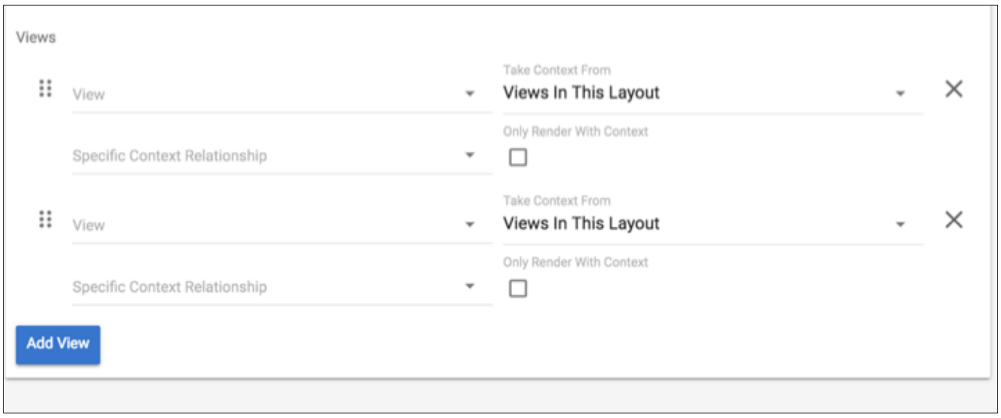
2. You now need to set the number of columns you wish to have in your view and set their size

    a. First click on Number of Columns and select a value (you are able to create up to 4)

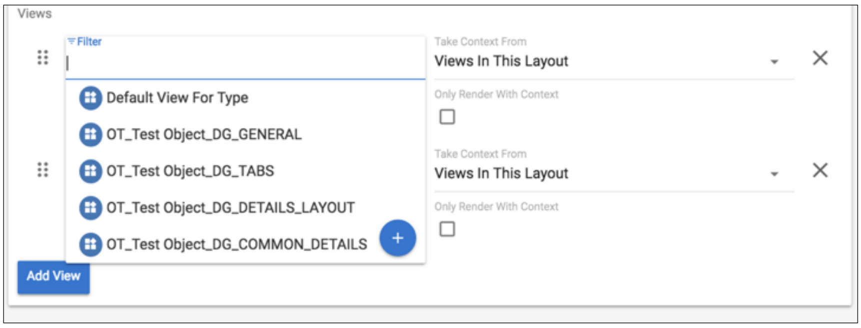
    b. Choose the size for each column (A value of 0 sizes automatically)

    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)



    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.



    b. 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

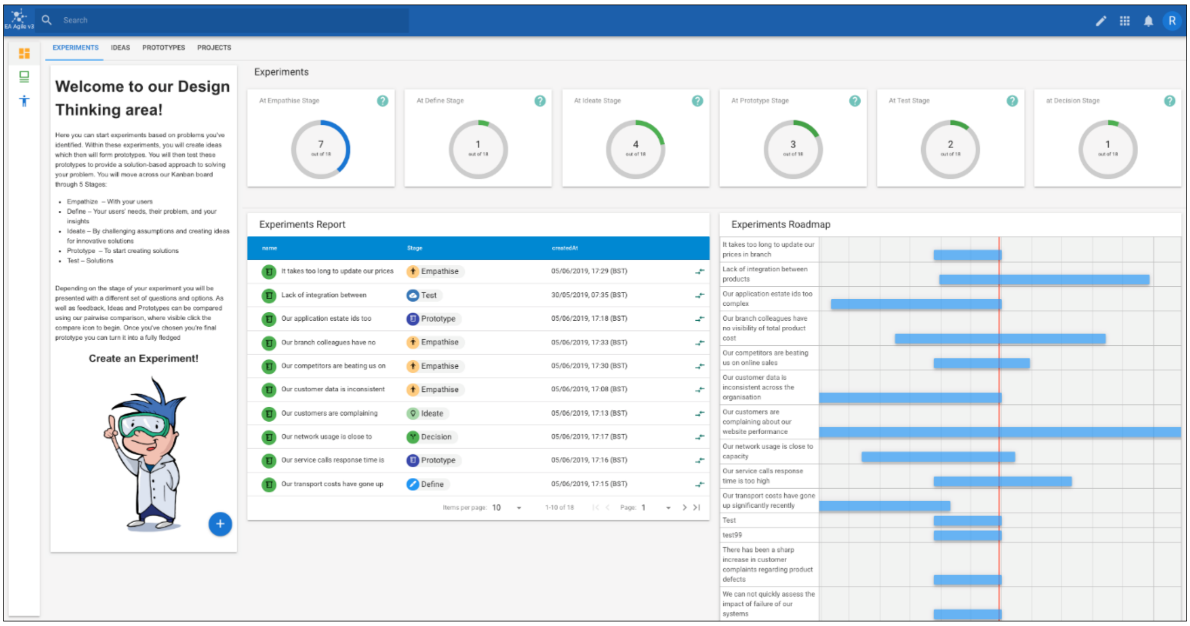
    c. Repeat Step 4 until you have the appropriate number of Views for your Columns

4. Click Save to finish.

How Do I Place a View in a Card?

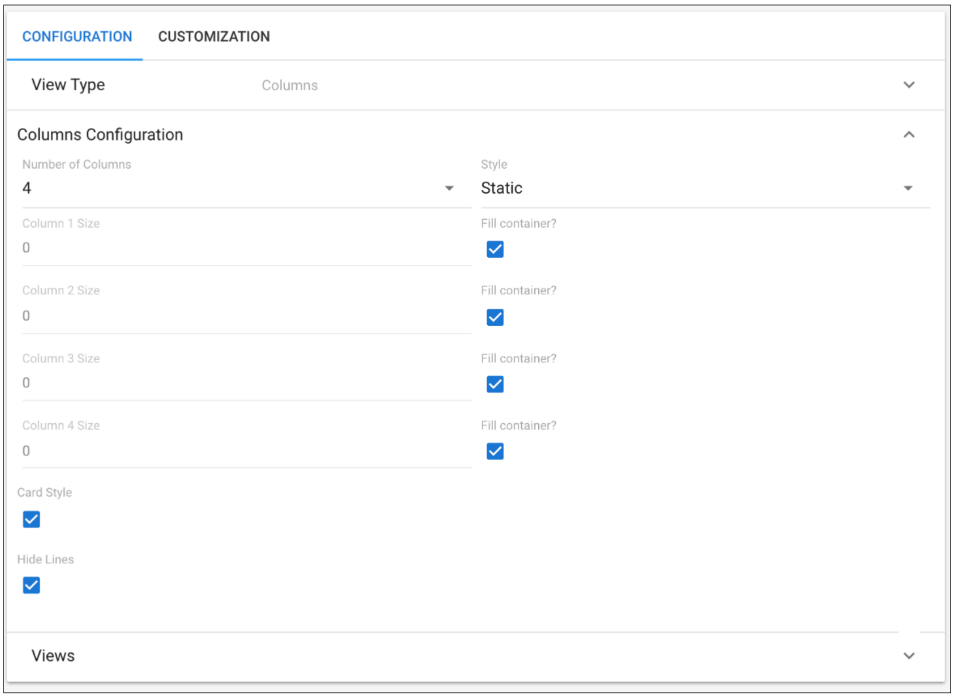
This can only be done within a Column View.

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.



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



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.

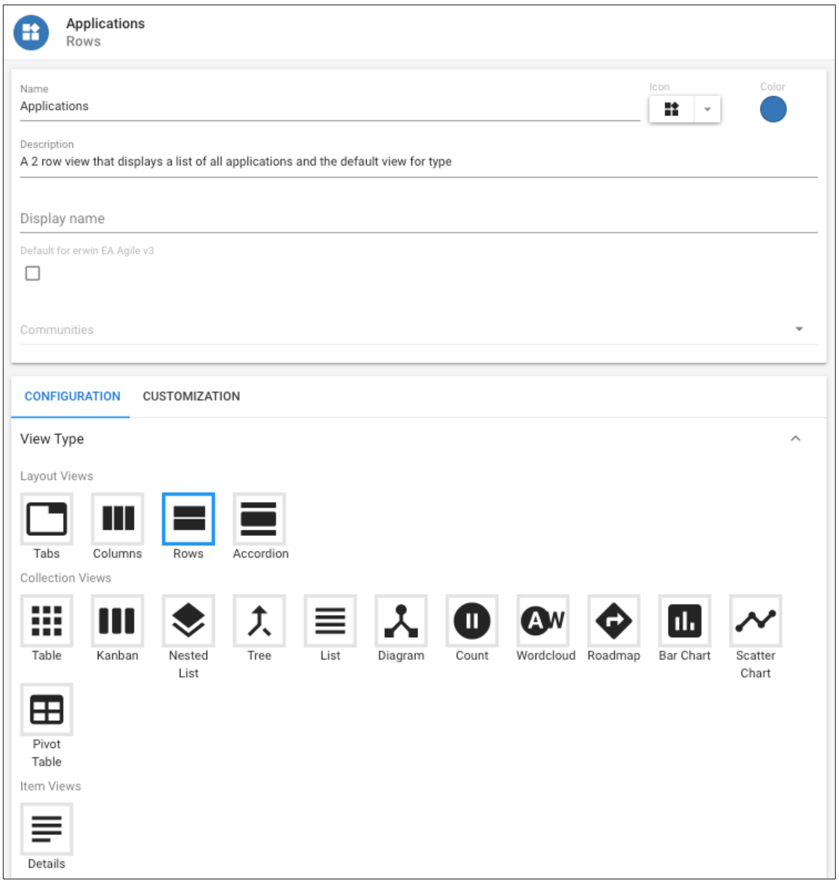
Rows View

How Do I Create a Rows View

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

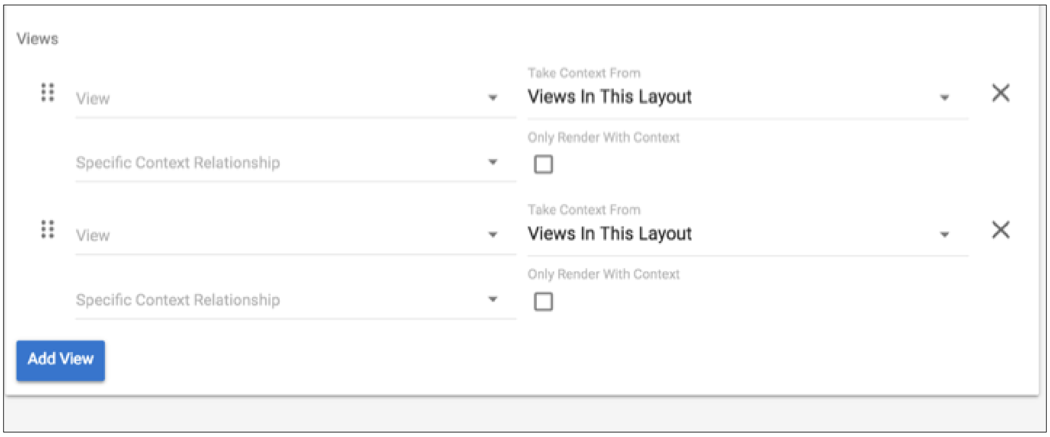
The following page details how to create a Rows View. You can use a Row View to contain other views such as a Table View or Diagram. Below is an example of a View broken into Rows.

1. Select 'Rows' from Layout Views.

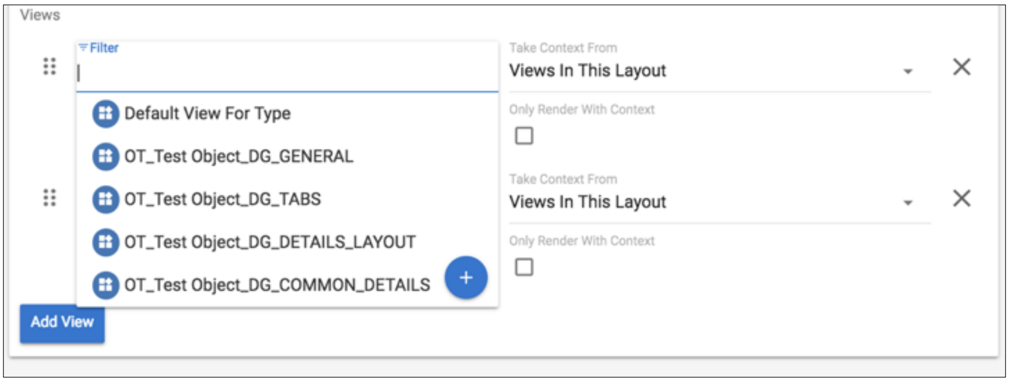


2. You now need to set the number of rows you wish to have in your view and set their size
    a. First click on Number of Rows and select a value (you are able to create up to 4)
    b. Choose the size for each Row (A value of 0 sizes automatically)

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)



    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



    b. 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

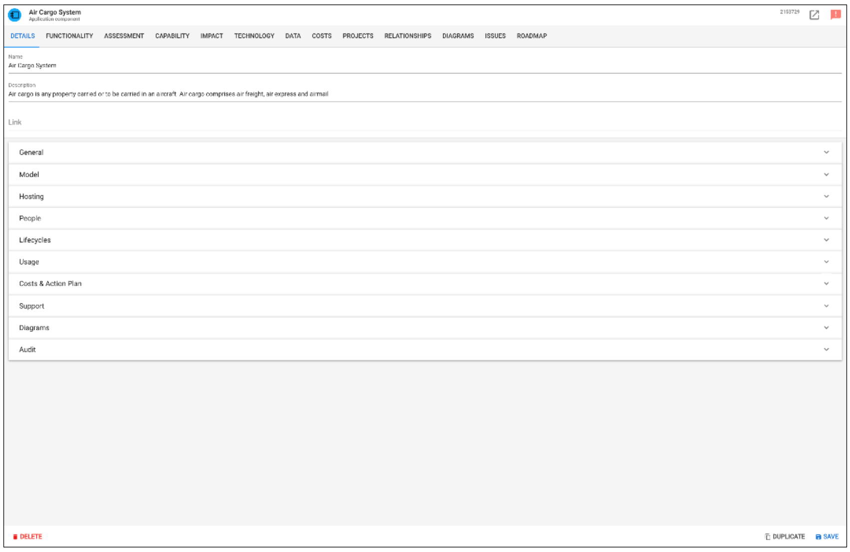
4. Click Save to finish.

Tabs View

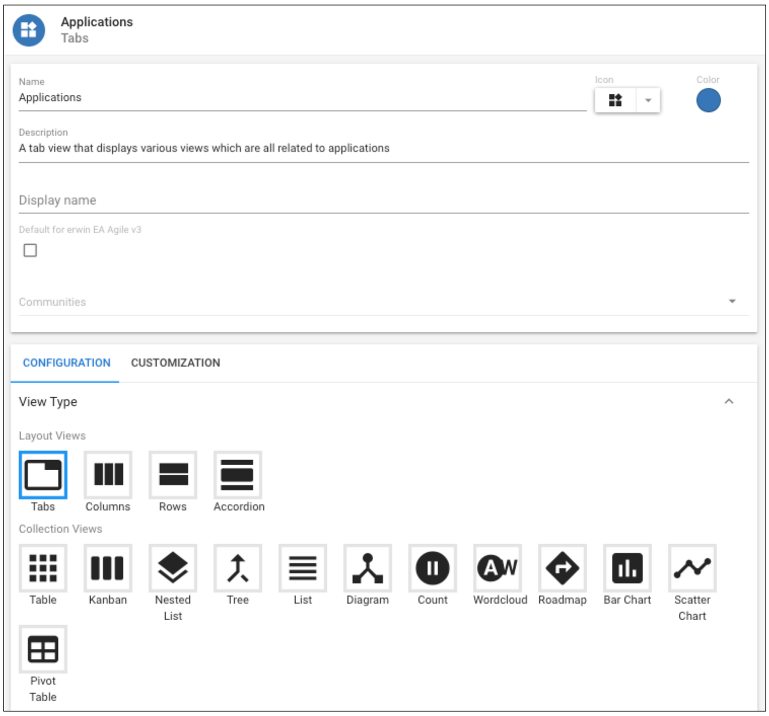
How Do I Create a Tabs View

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

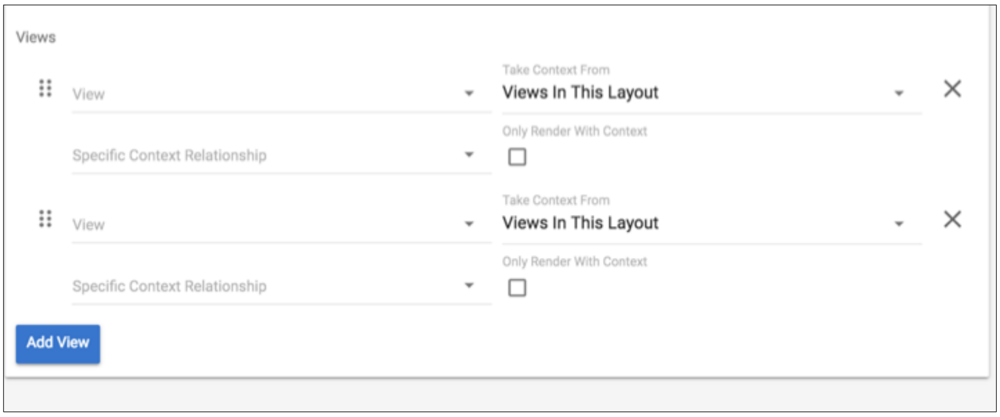
The following page details how to create a Tabs View. You can use a Tabs View to contain numerous other views, the views contained can be either Layout or Collection Views. Below is an example of a Tabs View.



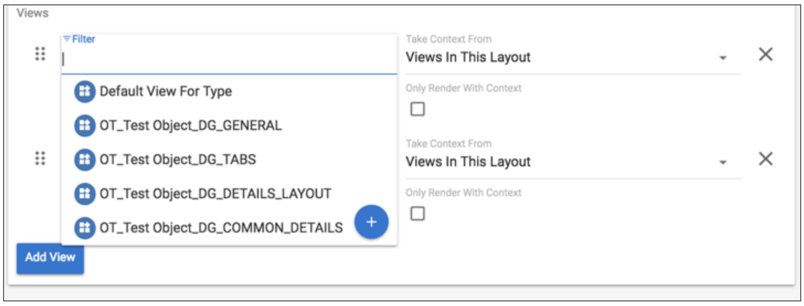
1. Select 'Tabs' from Layout Views



2. 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.



   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.



   b. 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

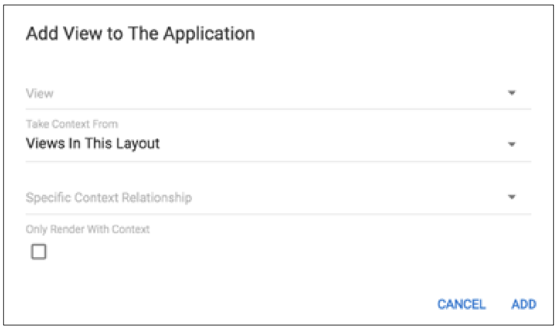
3. Click Save to finish.

How Do I Add a Tab to a Tab View?

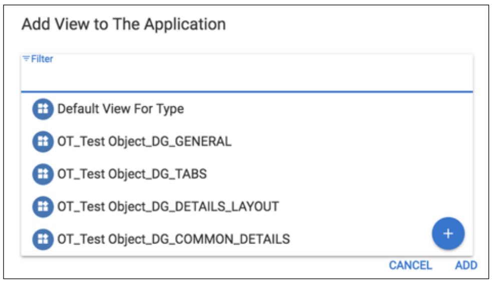
Through the configuration mode

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

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



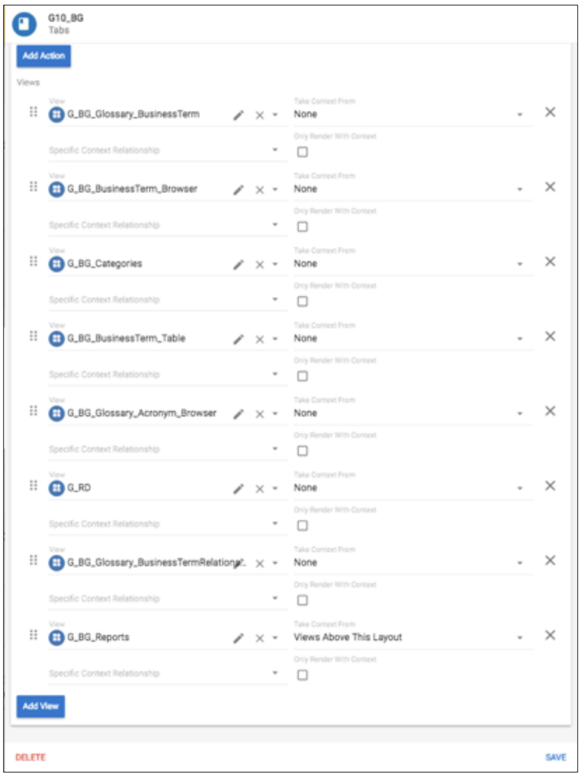
4. Click in the View field to either select a View or click the blue + button to create a new view (For more on how to create a new view please visit the ***New View*** help file)



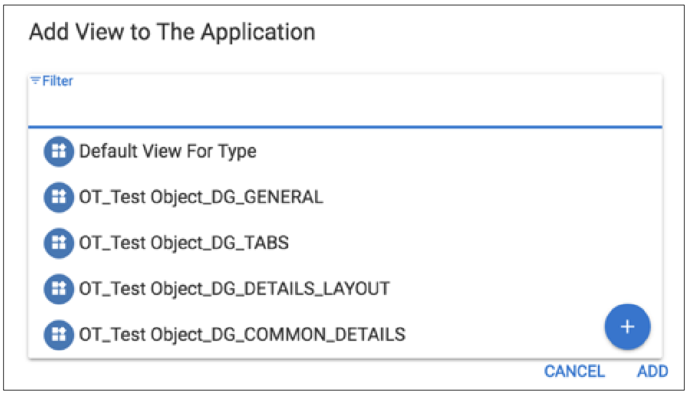
5. Once you have selected your view you need to select if it requires context
6. Finally, click 'ADD' in the bottom right corner of the panel to add your view

Through the configuration panel of the Tab View

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



2. Click on the blue 'Add View' button to bring up a new blank view form
3. 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)



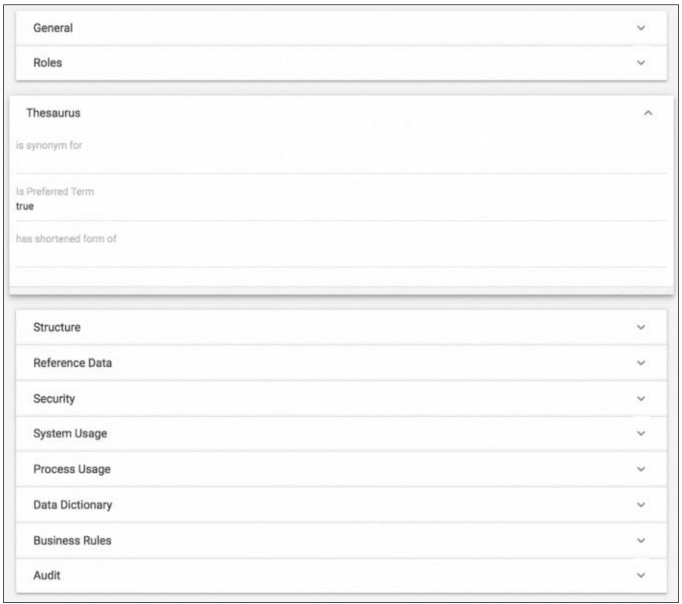
4. Once you have selected your view you need to select if it requires context
5. Once you have finished adding your view click the blue 'Save' button in the bottom right corner of the screen.

Accordion View

How do I Create an Accordion View?

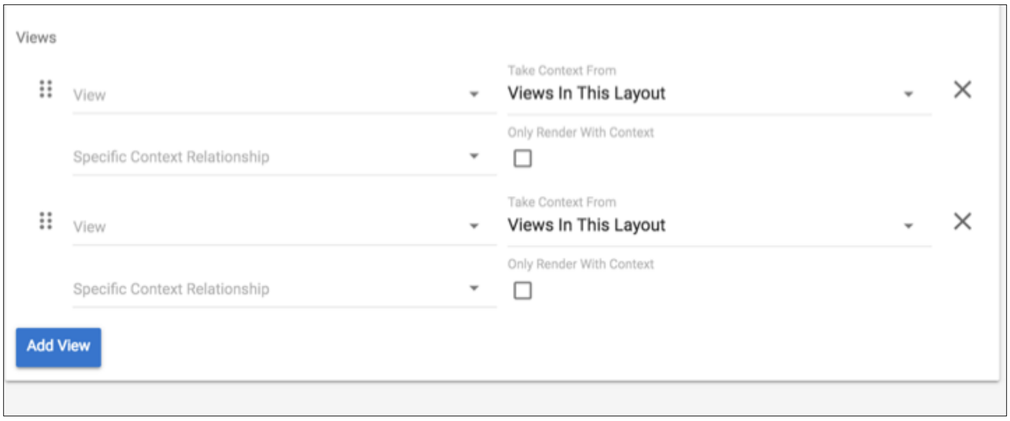
! Before starting you must read and follow the instructions in the ***New View*** help page.

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.

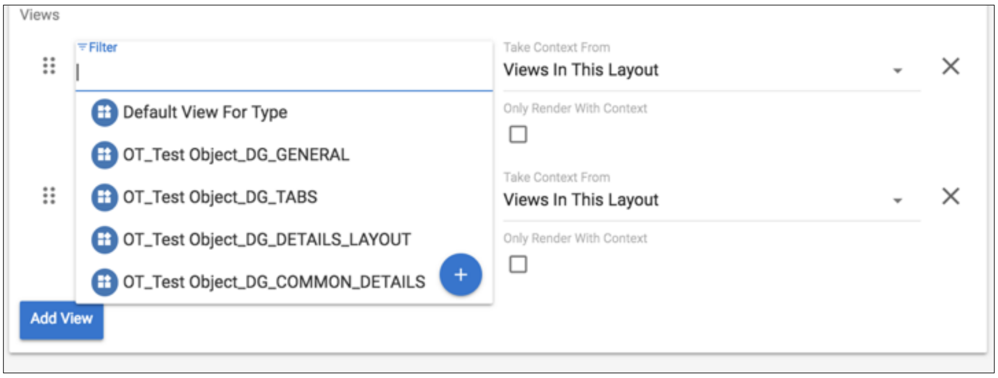


1. Select 'Accordion' from Layout Views.

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



   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



   b. 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

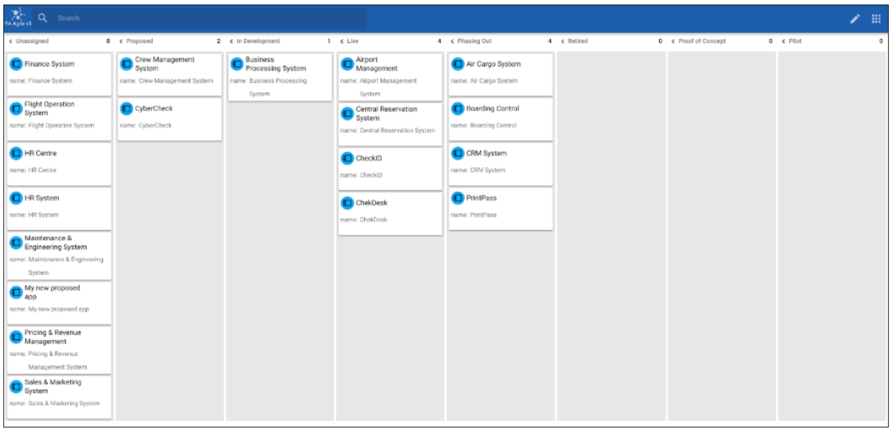
3. Click Save to finish.

Collection Views

Kanban View

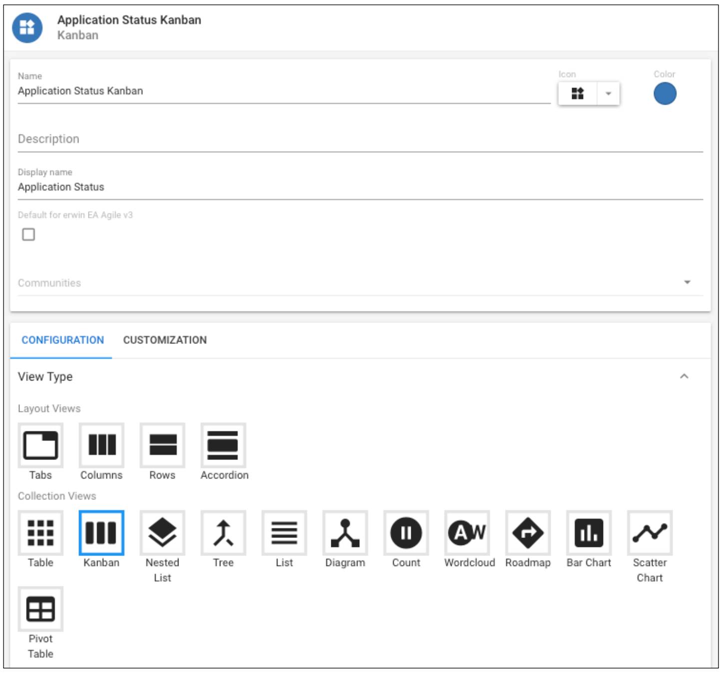
How Do I Create a Kanban?

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.

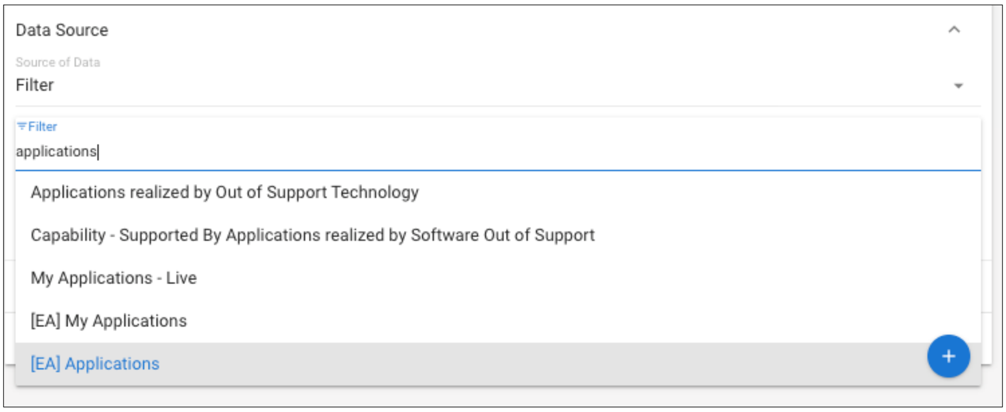


> Before starting you must read and follow the instructions in the ***New View*** help page.

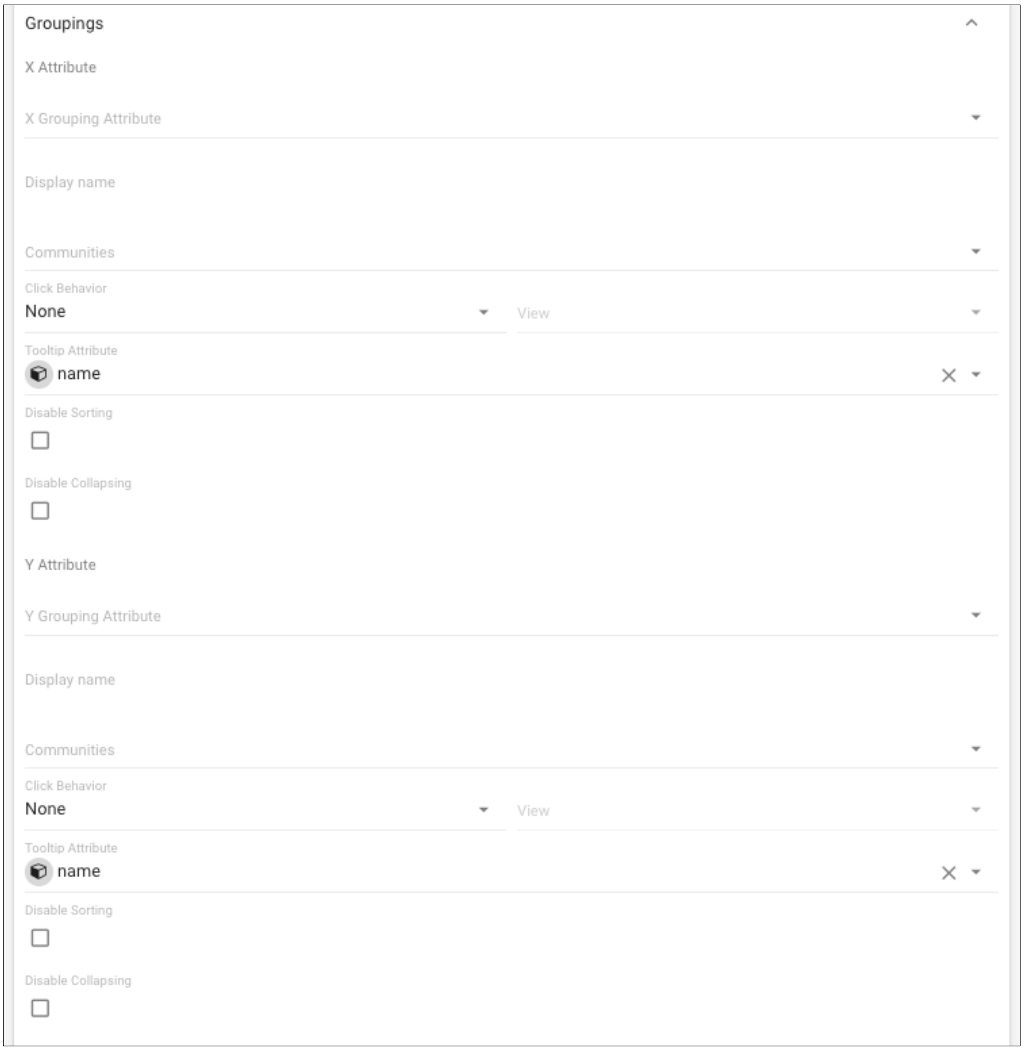
1. Select 'Kanban' from Collection Views.



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.

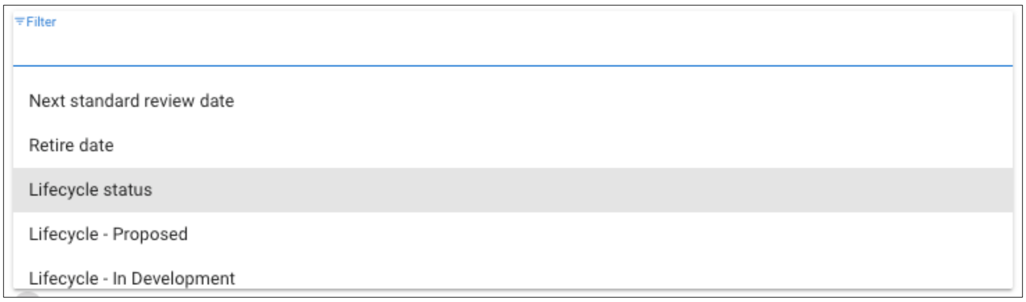


3. You will then need to set the X & Y attribute for your Kanban View

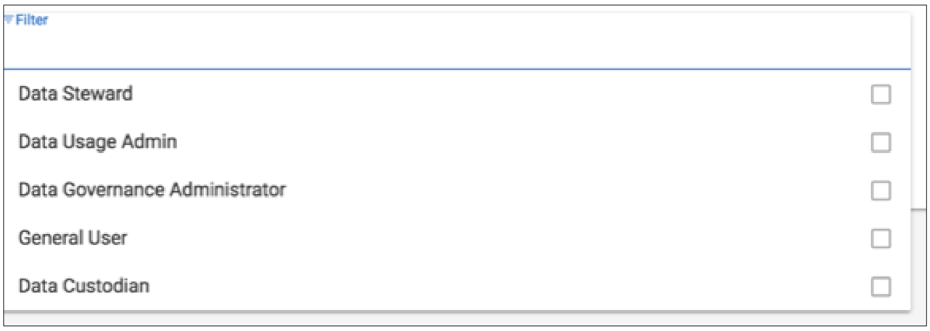


a. Select your X axis grouping attribute, for this example we will use the Status Attribute of Object Type ‘Business Term’

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



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



c. You can now choose whether the Icon has a Click Behaviour. There are 5 options:

i. Context:

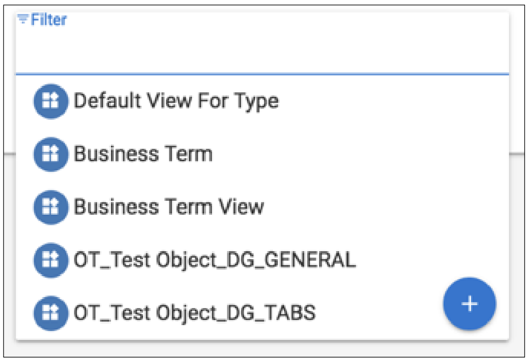
ii. None: Nothing will happen when the Property is clicked

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

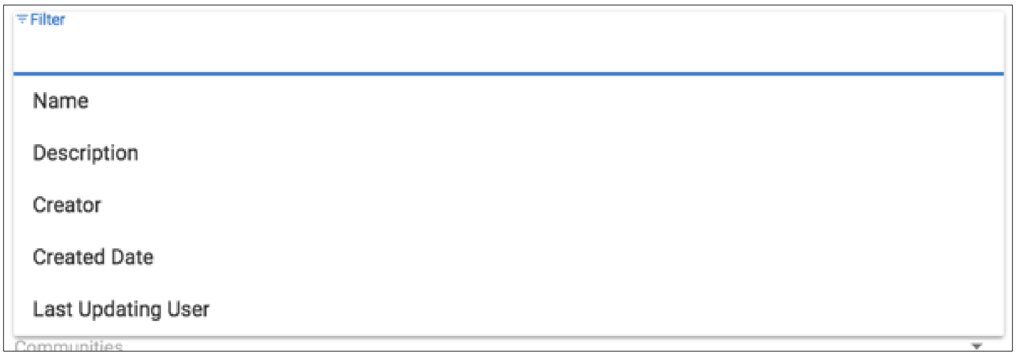
d. Open In Panel, Navigate To & Open In Dialogue require you to set a View to navigate to. Clicking in the ‘View’ field allows you to select a View by searching by name, select from a list or create a new view. The most common choice is ‘Default View For Type’



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



    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)

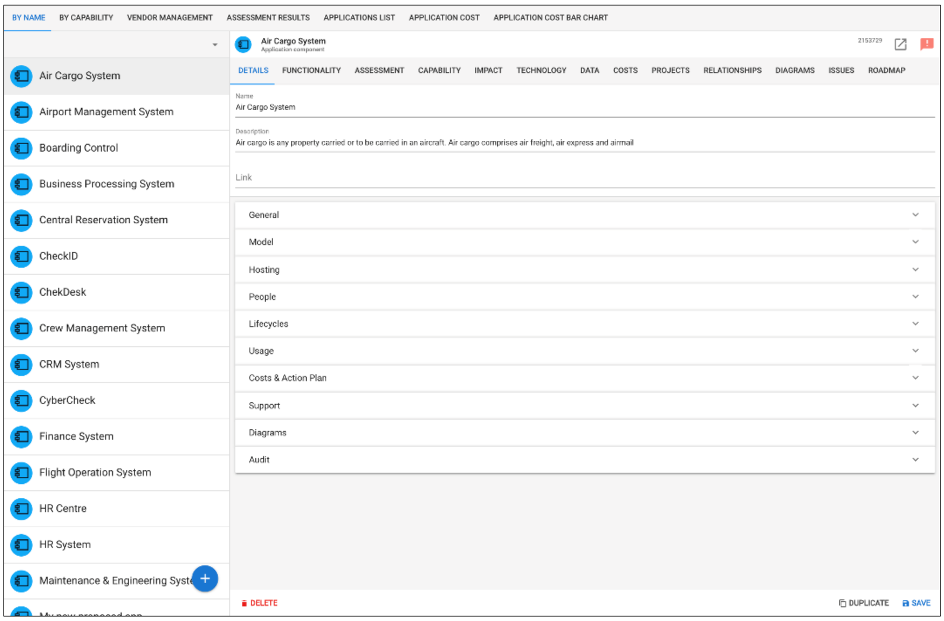
To add additional Attributes, click 'Add Display Property' and repeat from Step 4

8. Once you have finished configuring your Kanban View click 'Save'.

List View

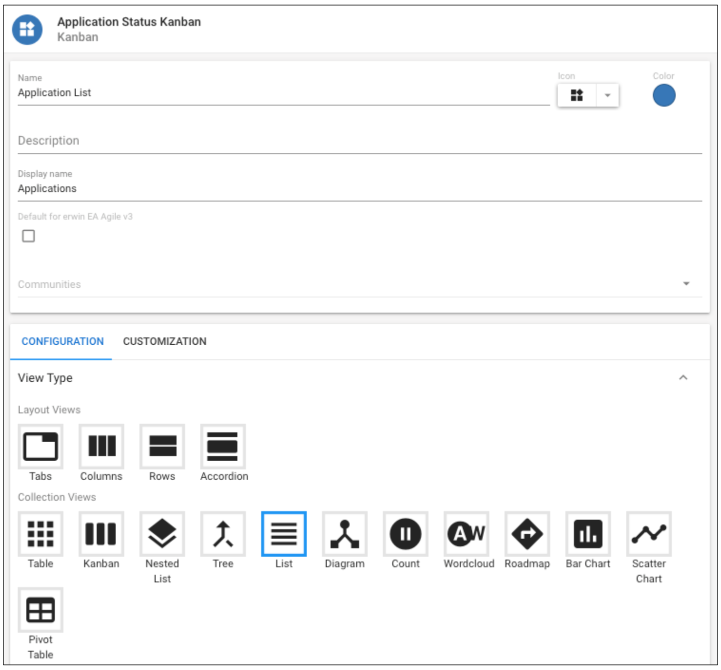
How Do I Create a List View?

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.

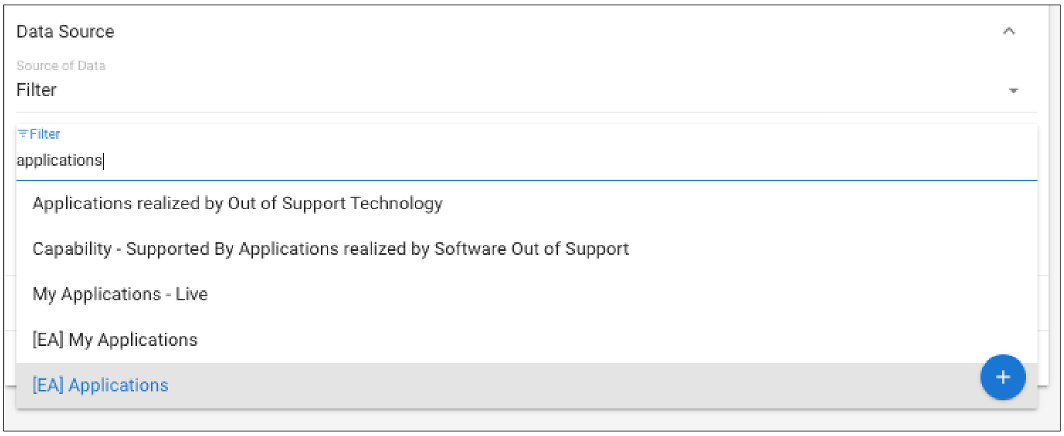


! Before starting you must read and follow the instructions in the ***New View*** help page.

1. Select 'List' 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

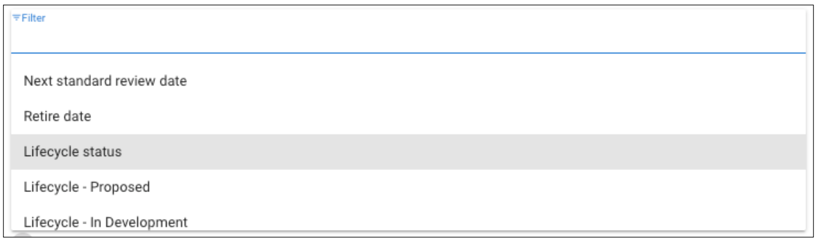


3. Next you will need to select which Attributes are displayed within your list.

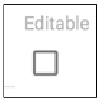
a. Generic Attributes are Attributes that are in all Object Types

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



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:

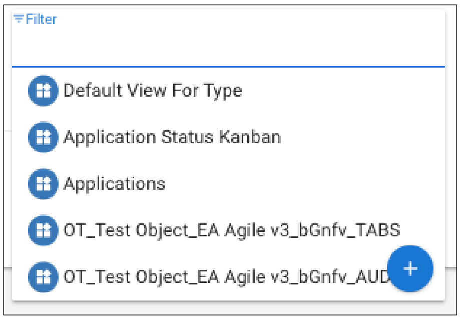
    ii. None: Nothing will happen when the Attribute is clicked

    iii. Open In Panel: A side panel will pop out

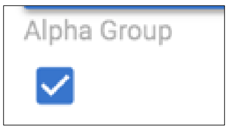
    iv. Navigate To: Redirected to a new page displaying the set view

    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'

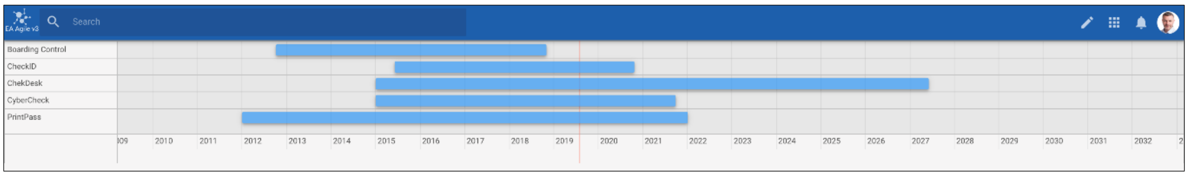


9. Once you have finished click 'Save'.

Roadmap View

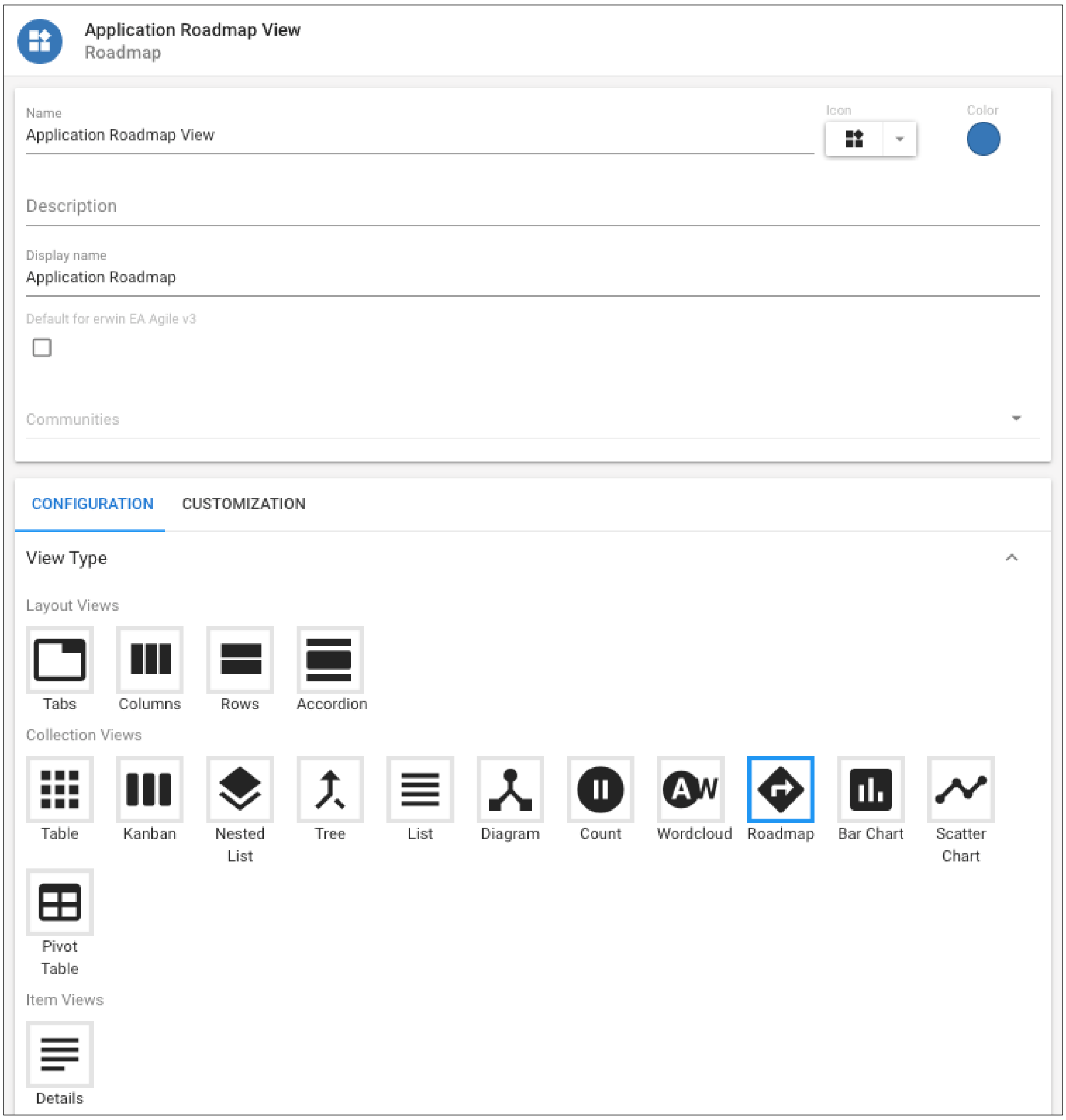
How Do I Create a Roadmap?

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

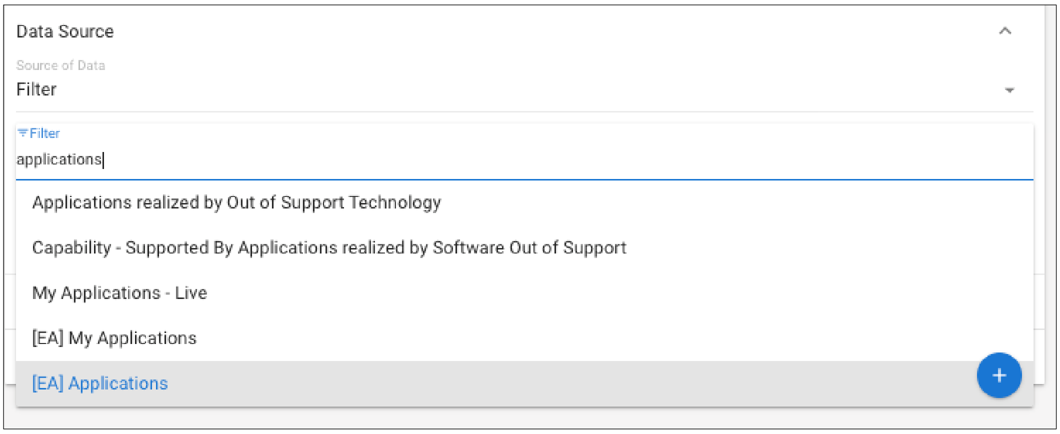


! Before starting you must read and follow the instructions in the ***New View*** help page.

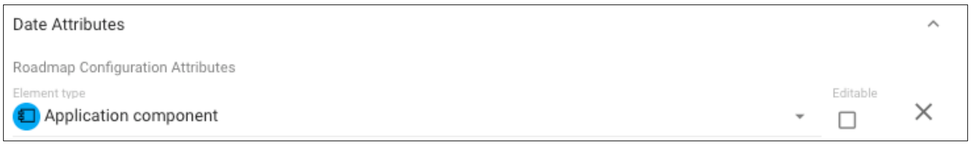
1. Select ‘Roadmap’ from Collection Views



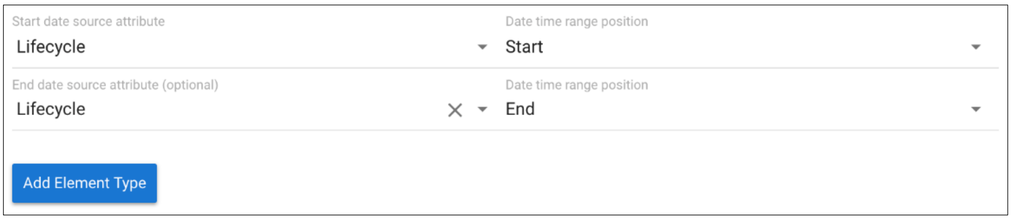
2. Add a Filter so your Roadmap only displays the instances you require. You can either select a filter or create a new one (For more on how to create a filter, please visit the ***Filters*** help file)



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



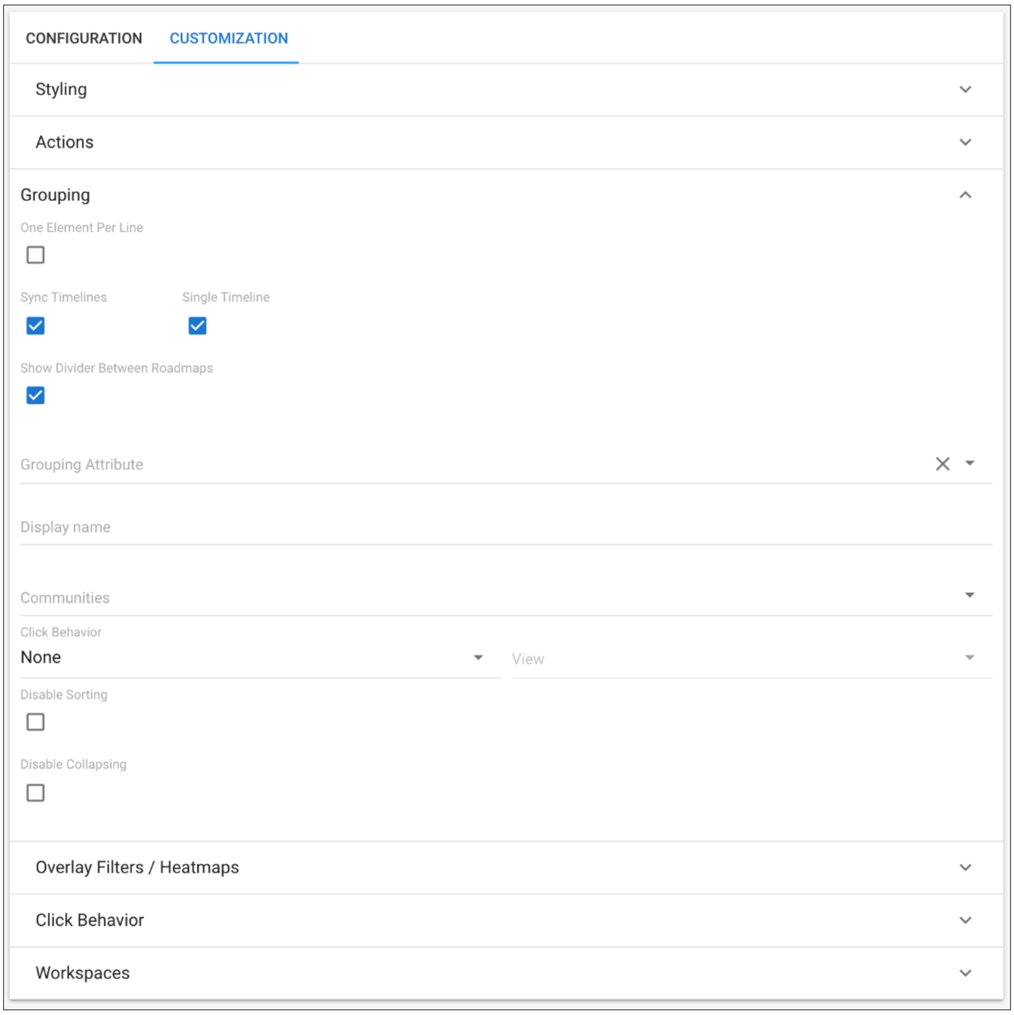
   b. Then, select the Source Attributes for your date or date range



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.

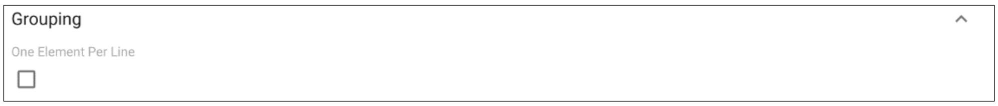


2. Select the Attribute you wish to group by

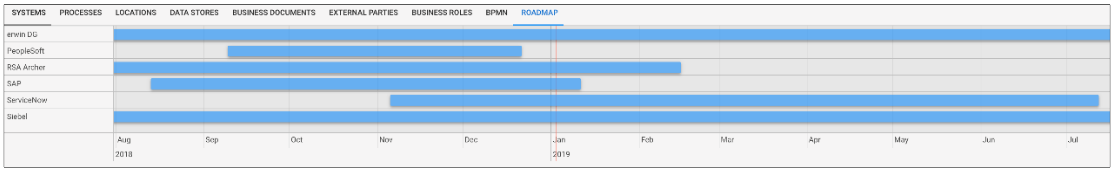
Roadmap Styling

There are several styling options available for our Roadmap View.

You can choose to display elements one-per-line



Tick the box and Save to change the style

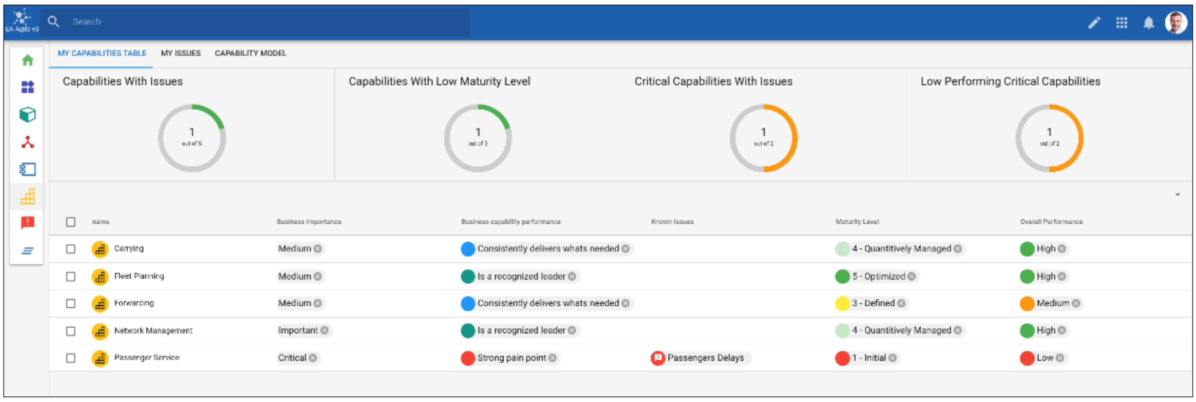


If you've chosen to group your roadmap by an Attribute you can Sync timelines for easier navigation. You can also choose to have one master timeline rather than a timeline per-group

Count View

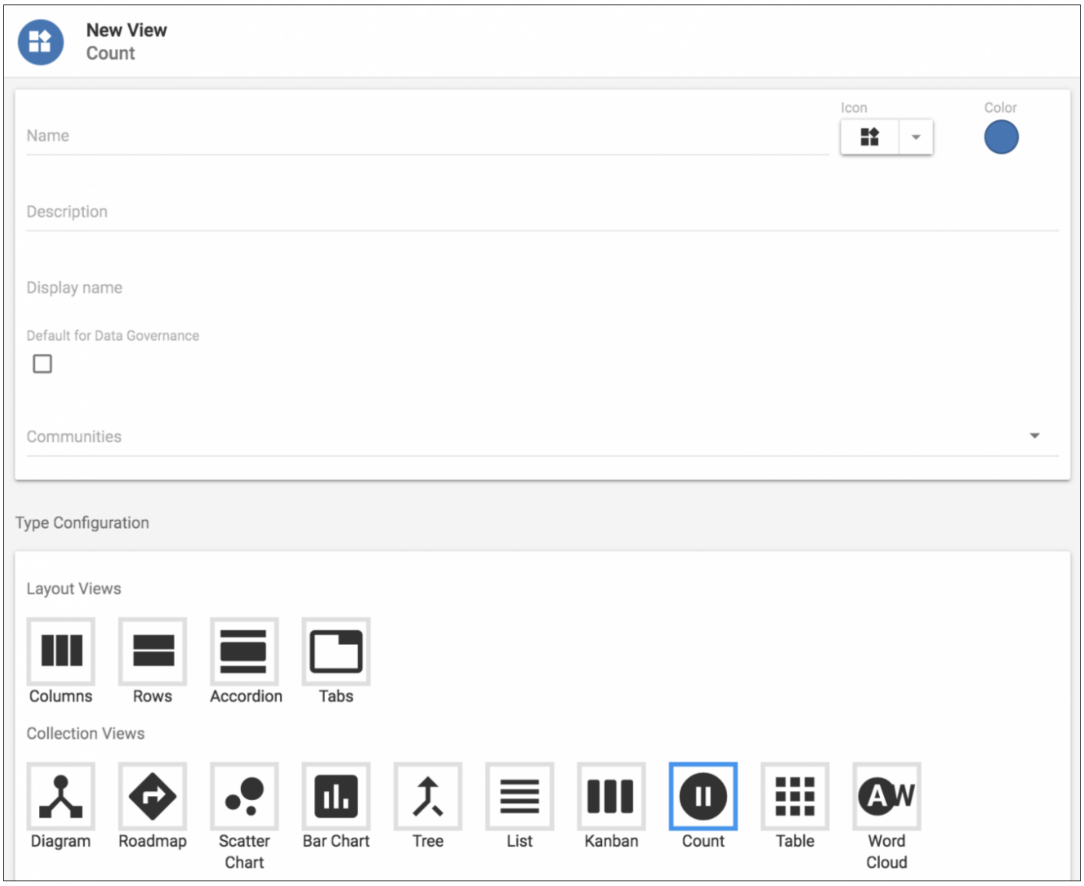
How Do I Create a Counts View?

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

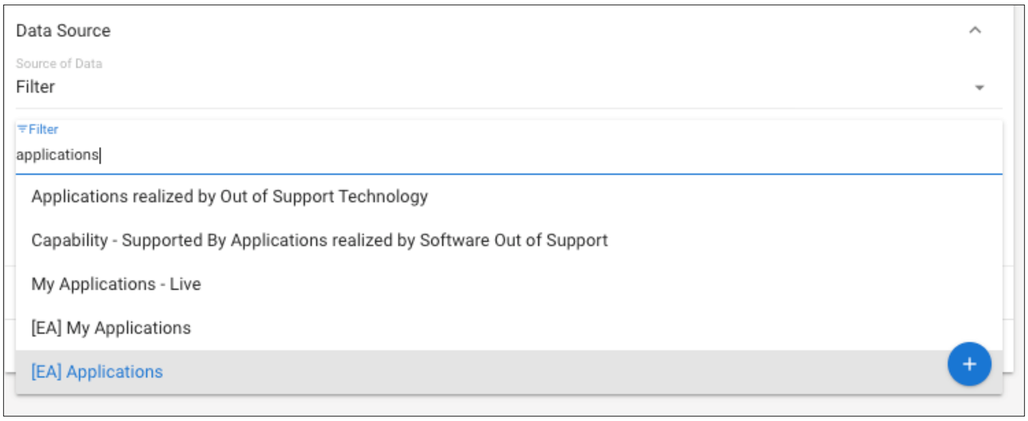


Before starting you must read and follow the instructions in the ***New View*** help page.

1. Select 'Count' from Collection Views



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)



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

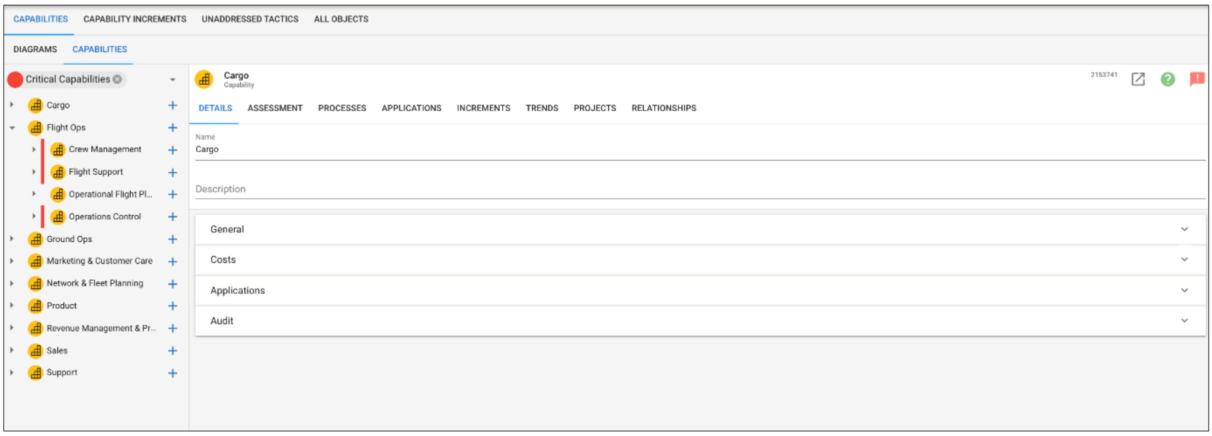
5. You can also set Intervals to change the color of your Count and display an Icon when it hits a Value
   i. Click 'Add Interval'
   ii. Select your Interval Type, you can choose to have Intervals at an Absolute value or a Percent value
   iii. This will bring up a blank Interval to form
   iv. Set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

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

Tree View

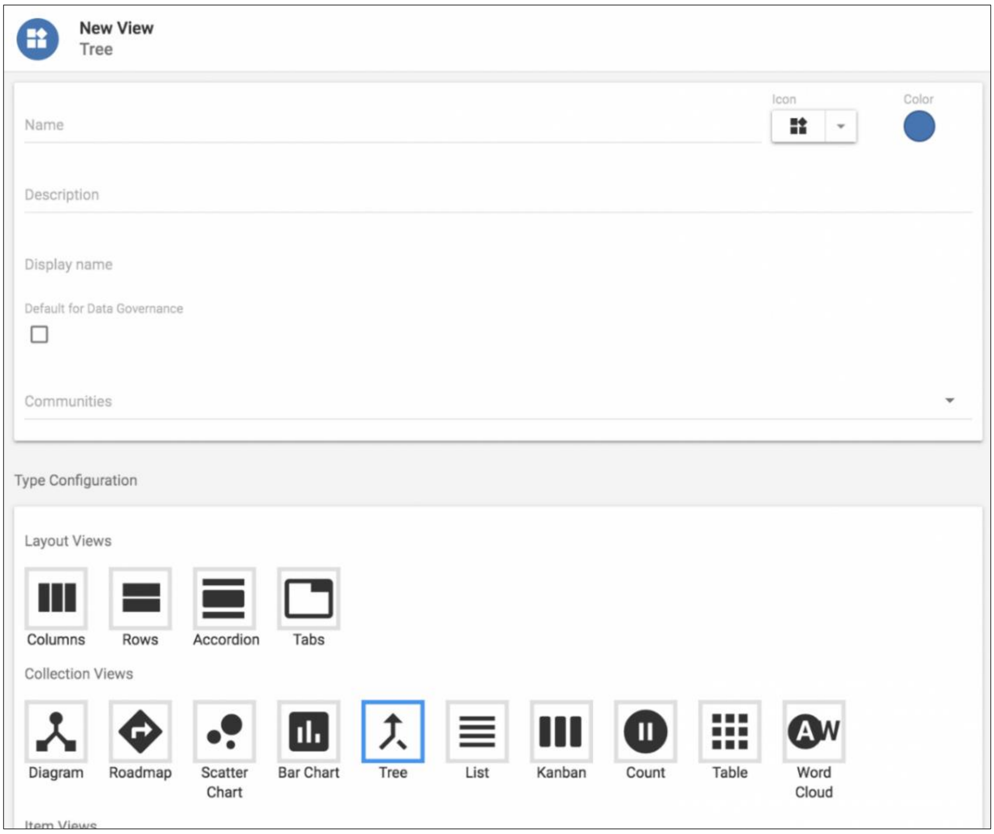
How Do I Create a Tree View?

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.



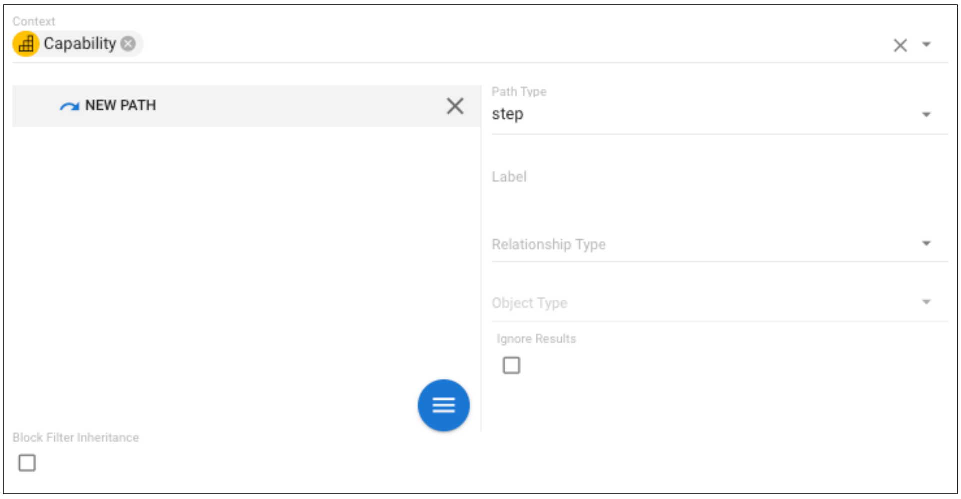
! Before starting you must read and follow the instructions in the ***New View*** help page.

1. Select 'Tree' from Collection Views

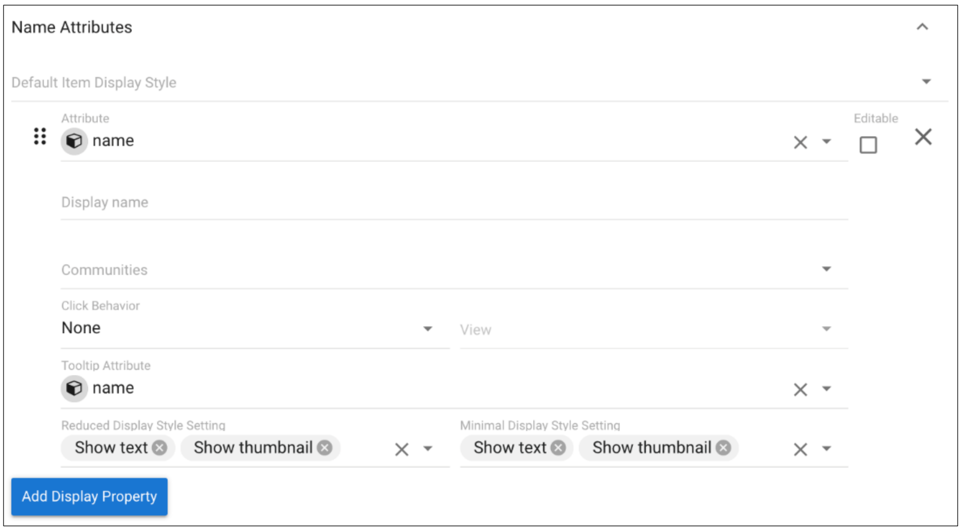


2. Tree Views can work with either Filters or Journeys. We recommend using Journeys to get the most out of this view type.

To create a Journey to define the structure of your tree please read the ***Journeys*** help file for guidance on how to create one



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

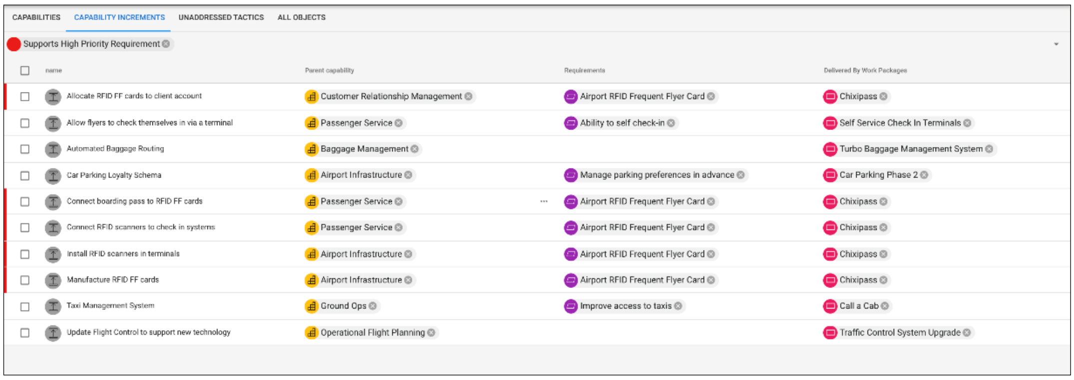


4. Once you have finished configuring your Tree View click 'Save'.

Table View

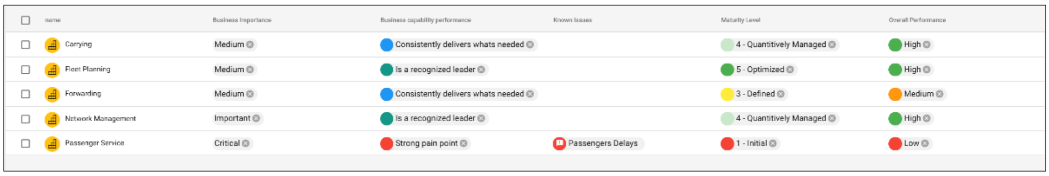
How Do I Create a Table View?

An example of a Table View displaying related objects.



name	Parent capability	Requirements	Delivered By Work Packages
Allocate RFID FF cards to client account	Customer Relationship Management	Airport RFID Frequent Flyer Card	Chixipass
Allow flyers to check themselves in via a terminal	Passenger Service	Ability to self check-in	Self Service Check In Terminals
Automated Baggage Routing	Baggage Management		Turbo Baggage Management System
Car Parking Loyalty Schema	Airport Infrastructure	Manage parking preferences in advance	Car Parking Phase 2
Connect boarding pass to RFID FF cards	Passenger Service	Airport RFID Frequent Flyer Card	Chixipass
Connect RFID scanners to check in systems	Passenger Service	Airport RFID Frequent Flyer Card	Chixipass
Install RFID scanners in terminals	Airport Infrastructure	Airport RFID Frequent Flyer Card	Chixipass
Manufacture RFID FF cards	Airport Infrastructure	Airport RFID Frequent Flyer Card	Chixipass
Taxi Management System	Ground Ops	Improve access to taxis	Call a Cab
Update Flight Control to support new technology	Operational Flight Planning		Traffic Control System Upgrade

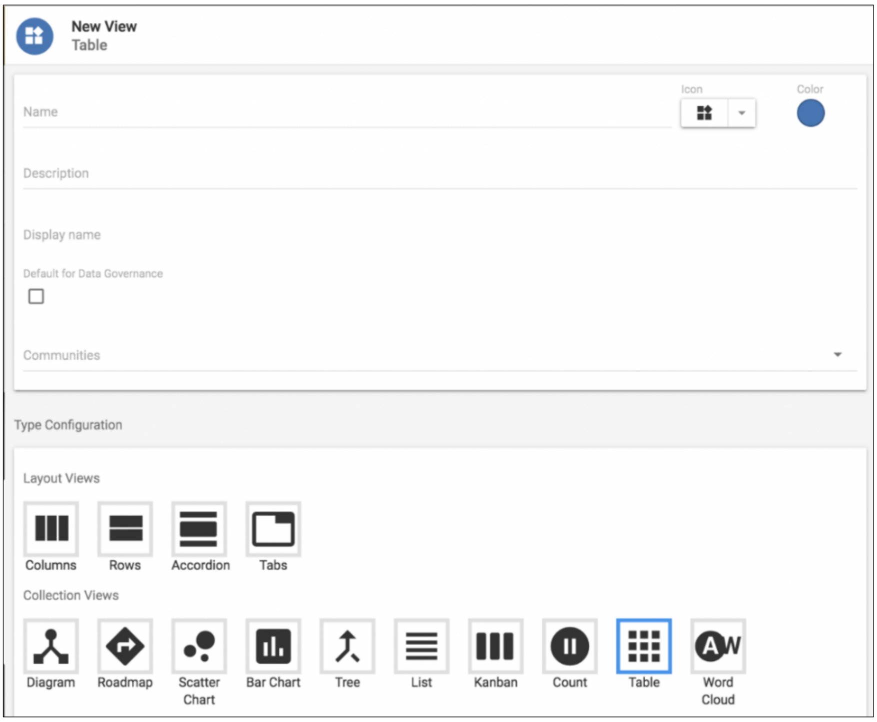
An example of a Table View displaying various object attributes



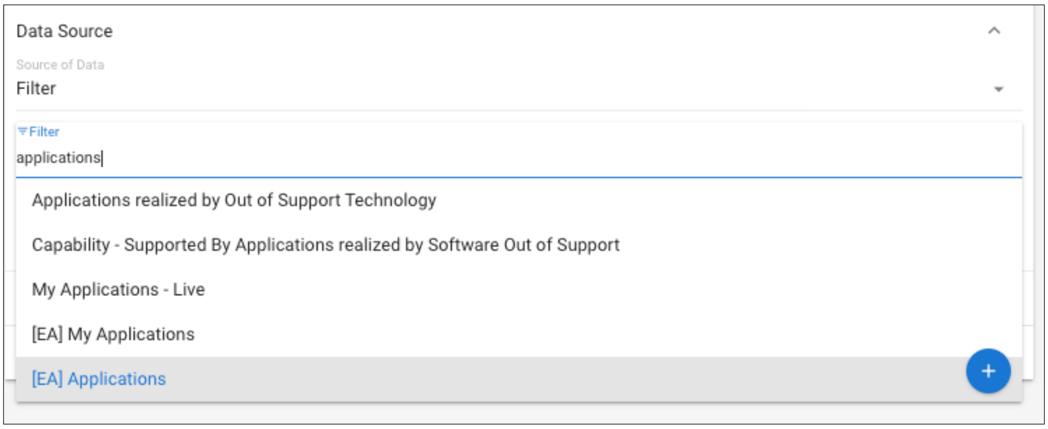
name	Business Importance	Business capability performance	Known Issues	Maturity Level	Overall Performance
Carrying	Medium	Consistently delivers whats needed		4 - Quantitively Managed	High
Fleet Planning	Medium	Is a recognized leader		5 - Optimized	High
Forwarding	Medium	Consistently delivers whats needed		3 - Defined	Medium
Network Management	Important	Is a recognized leader		4 - Quantitively Managed	High
Passenger Service	Critical	Strong pain point	Passengers Delays	1 - Initial	Low

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

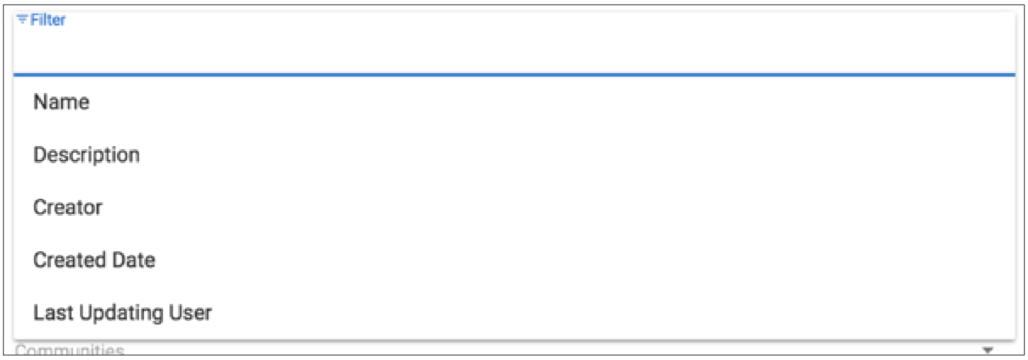
1. Select 'Table' from Collection Views.



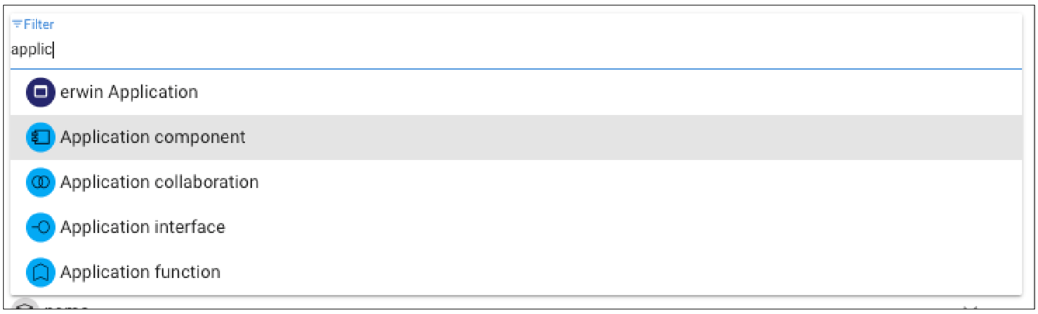
2. Filters, Journeys & Queries can be used in Tables. Filters will return your Object in column A and your selected display attributes in the remaining columns. Journeys will display across the columns but with no additional properties & Queries can return a journey across the metamodel with properties of objects at each step.
   For more on how to create a filter or a Journey please visit the ***Filters, Journeys*** or ***Queries***



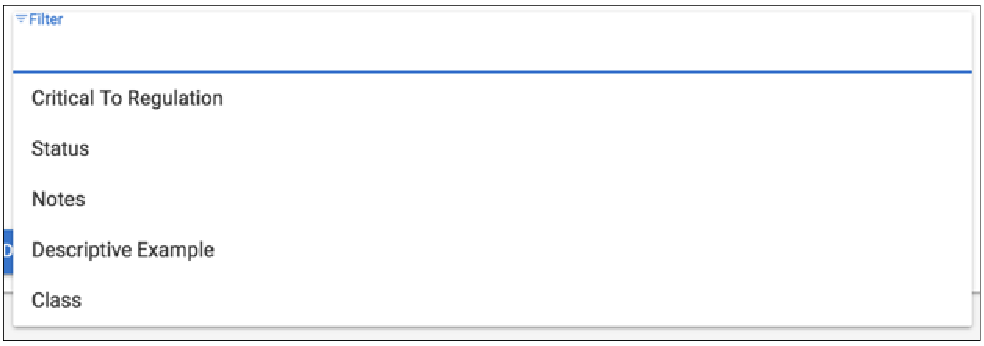
3. You will then need to select which Attributes are displayed in the columns of your Table
   a. Generic Attributes are Attributes that are in all Object Types



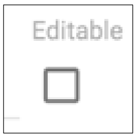
   b. If you want to display Attributes that are only of the Object Type you're creating your display view for. You can either select the Object Type manually or search for a specific term



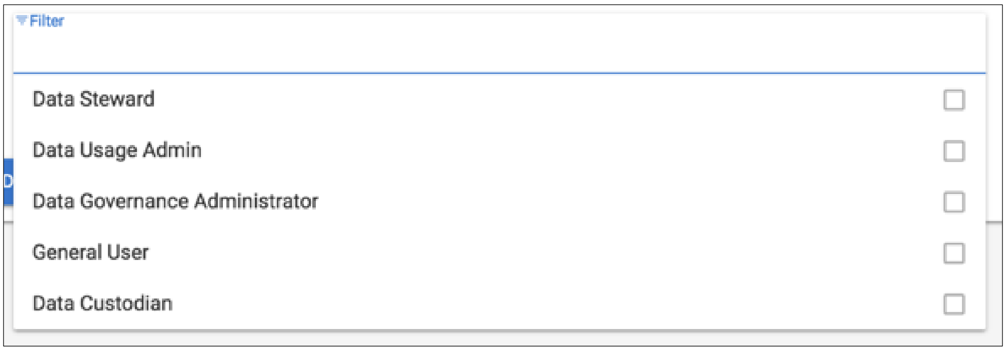
   c. This will bring a list of Object Type specific Attributes. Below the example is for Application Component



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



6. You can now choose whether the Attribute has a Click Behaviour. There are 5 options:

   i. Context:

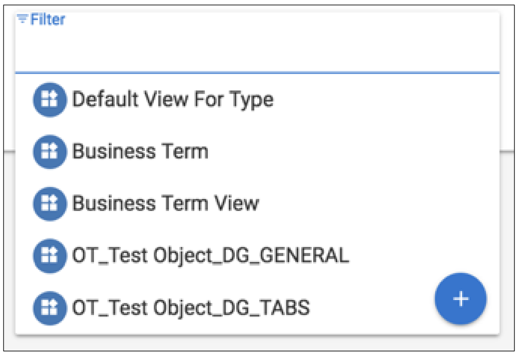
   ii. None: Nothing will happen when the Attribute is clicked

   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

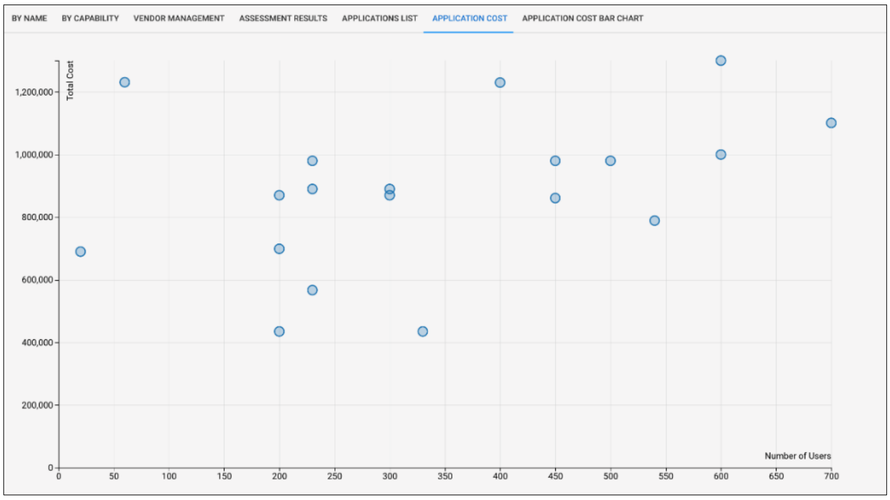
Open In Panel, Navigate To & Open In Dialogue require you to set a View to navigate to. Clicking in the ‘View’ field allows you to select a View by searching by name, select from a list or create a new view. The most common choice is ‘Default View For Type’



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

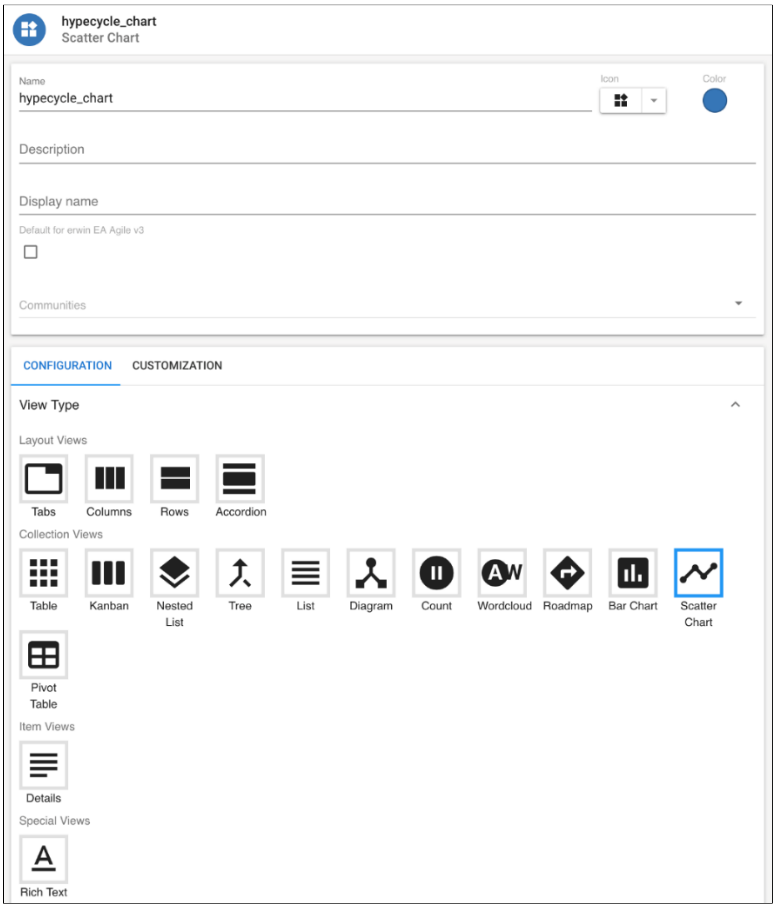
Scatter Chart

How Do I Create a Scatter Chart?

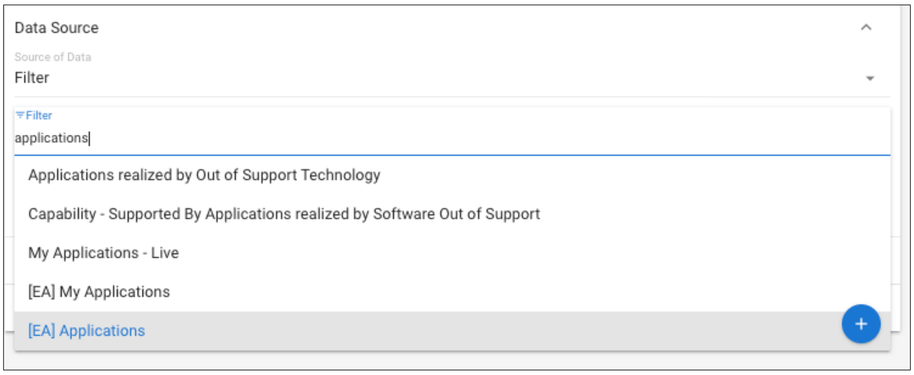


! Before starting you must read and follow the instructions in the ***New View*** help page.

1. Select 'Scatter Chart' 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)

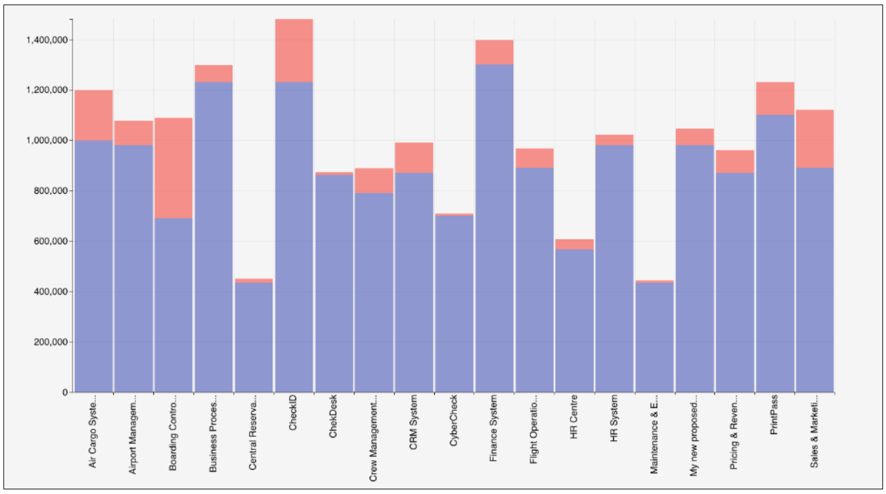


3. Select your X and Y Axis Attributes (These can only be an integer attribute type)

4. Click 'Save'.

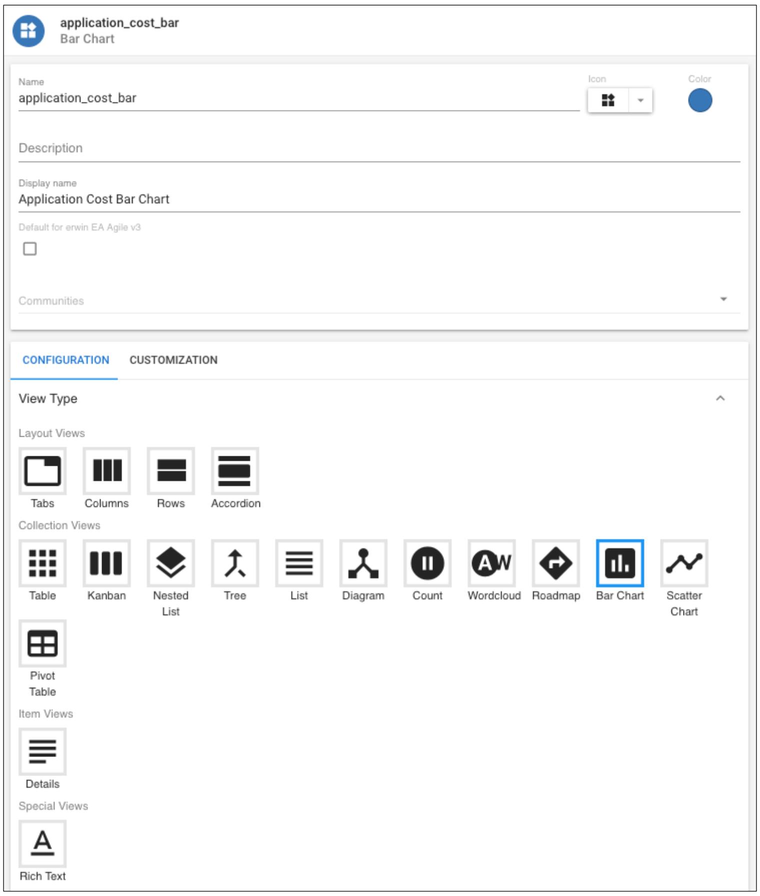
Stacked Bar Chart

How Do I Create a Stacked Bar Chart?

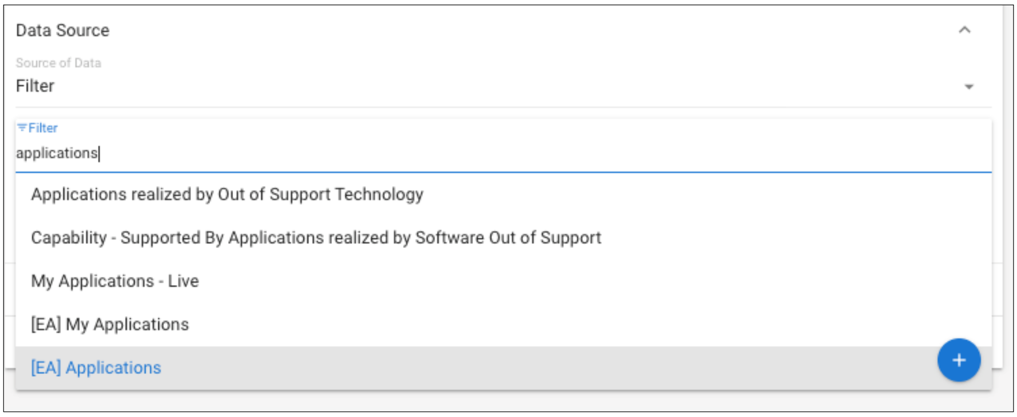


Before starting you must read and follow the instructions in the ***New View*** help page.

1. Select 'Bar Chart' from Collection Views



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)

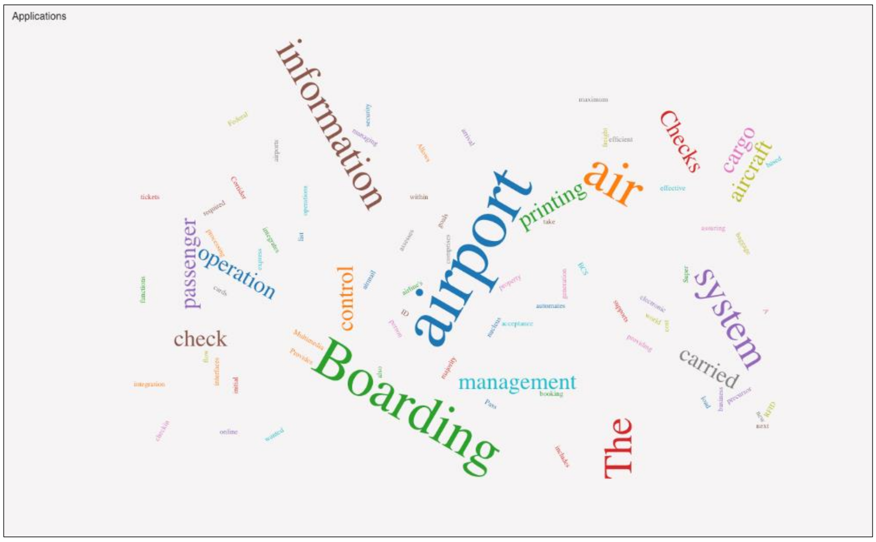


3. Select your Display Attributes and their colors (These can only be an integer attribute type)

4. Click 'Save'

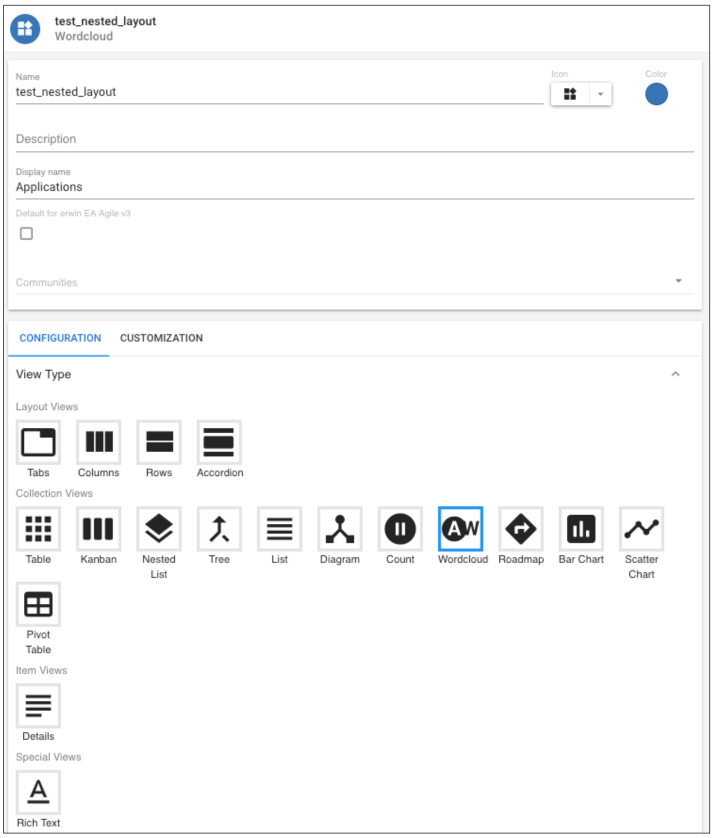
Word Cloud

How Do I Create a Word Cloud View?

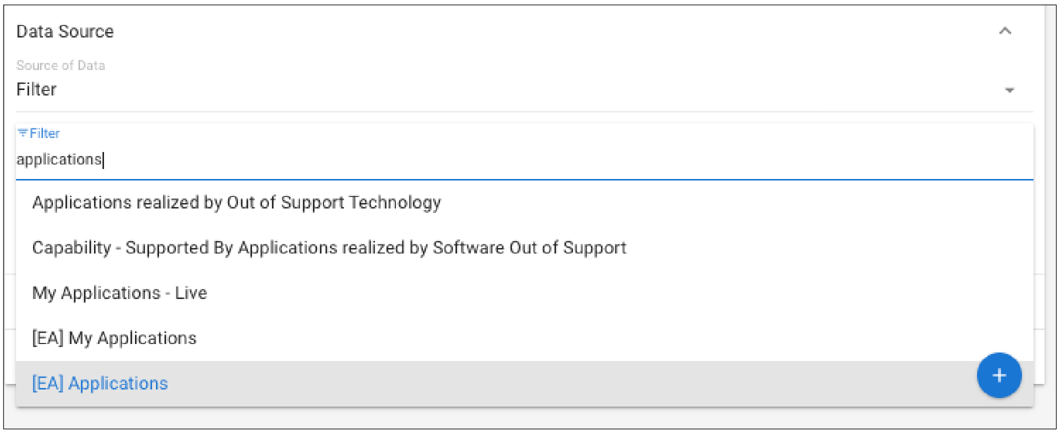


> **!** Before starting you must read and follow the instructions in the ***New View*** help page.

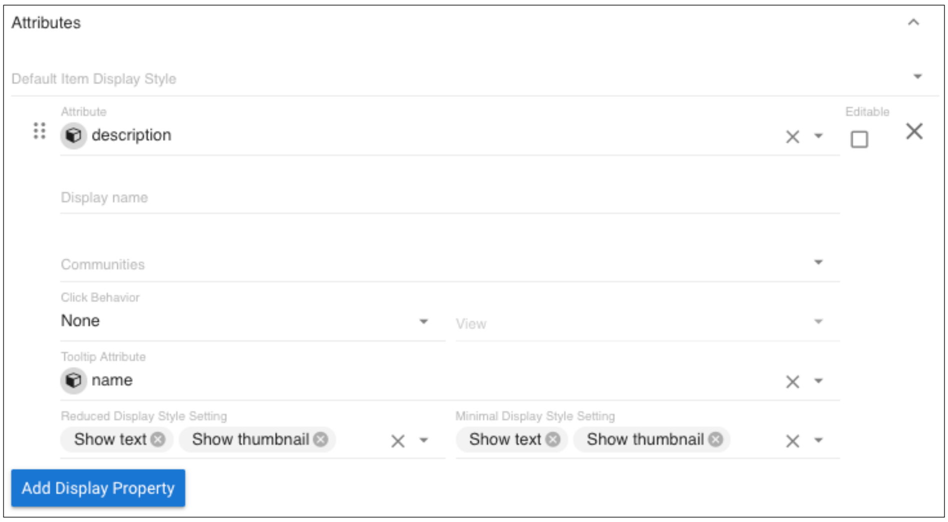
1. Select 'World Cloud' from the list of Collection Views



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)



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



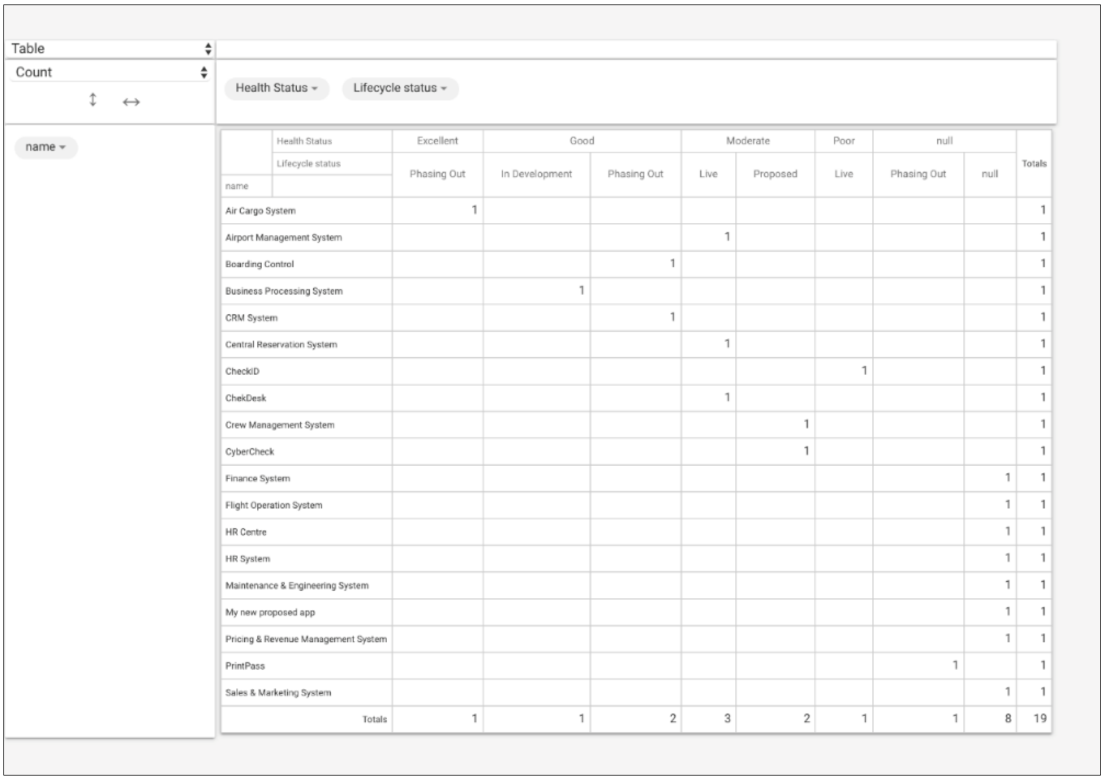
4. Click 'Save'

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.

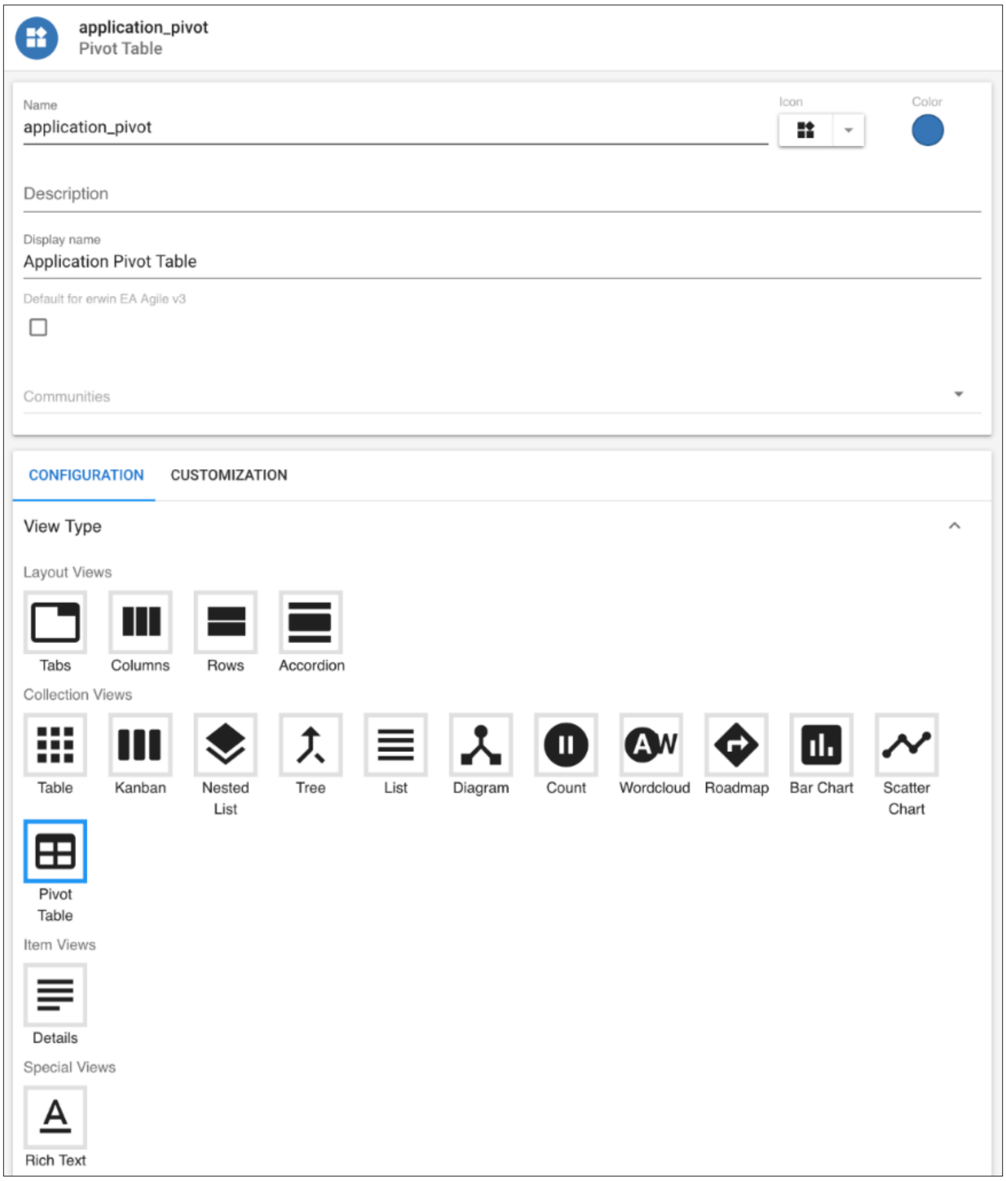
Clicking on the drop-down arrow next to an attribute will allow you to filter by the values of the attribute:



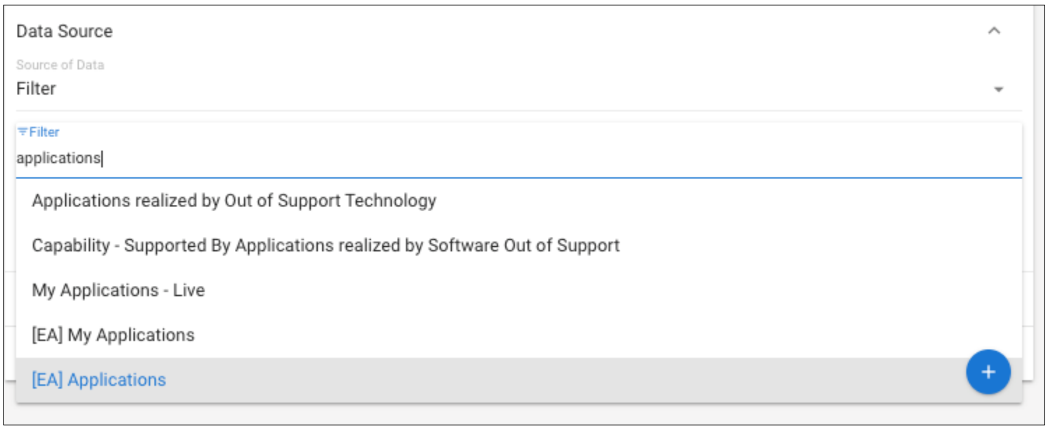
Health Status / Lifecycle status / name	Excellent	Good		Moderate		Poor	null		Totals
	Phasing Out	In Development	Phasing Out	Live	Proposed	Live	Phasing Out	null	
Air Cargo System	1								1
Airport Management System				1					1
Boarding Control			1						1
Business Processing System		1							1
CRM System			1						1
Central Reservation System				1					1
CheckID						1			1
ChekDesk				1					1
Crew Management System					1				1
CyberCheck					1				1
Finance System								1	1
Flight Operation System								1	1
HR Centre								1	1
HR System								1	1
Maintenance & Engineering System								1	1
My new proposed app								1	1
Pricing & Revenue Management System								1	1
PrintPass							1		1
Sales & Marketing 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.

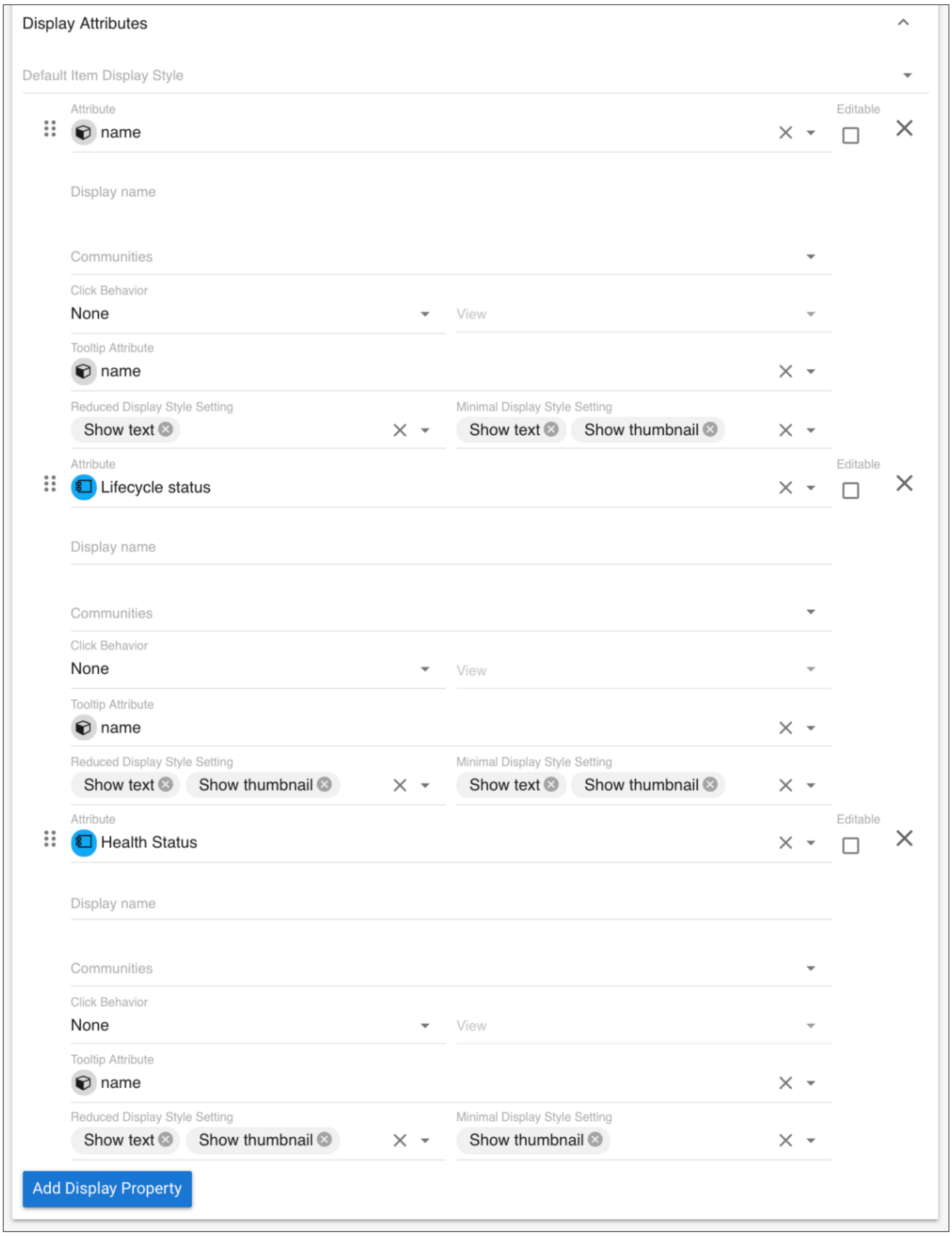
1. Select 'Pivot Table' from the list of Collection Views



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)



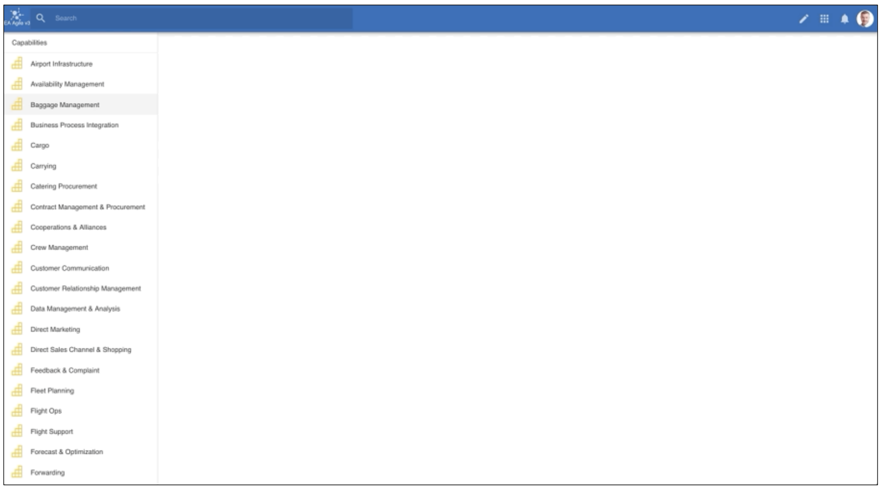
3. Select Display Attributes for you to use in your Pivot Table



Nested List

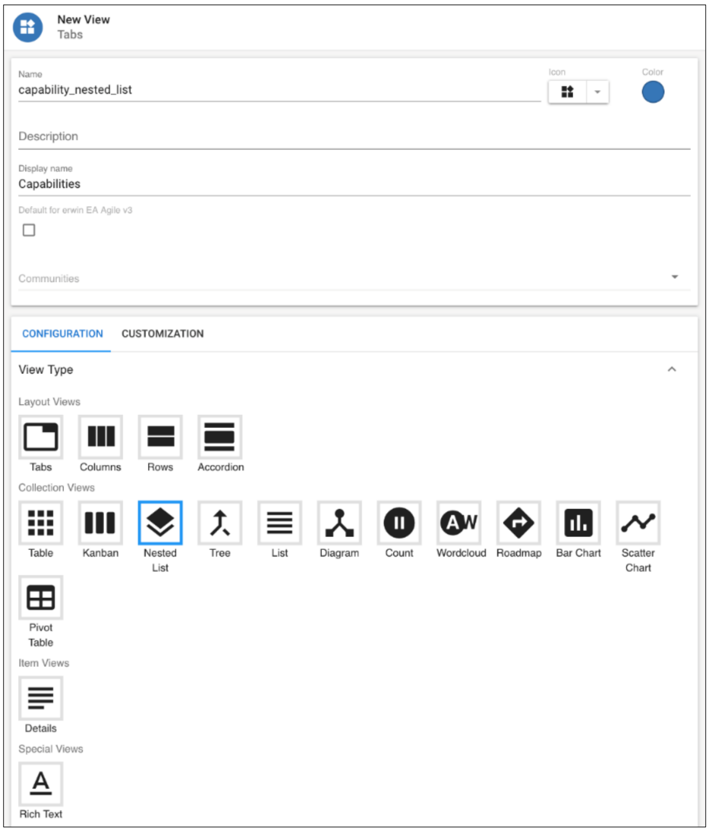
How Do I Create a Nested List View?

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

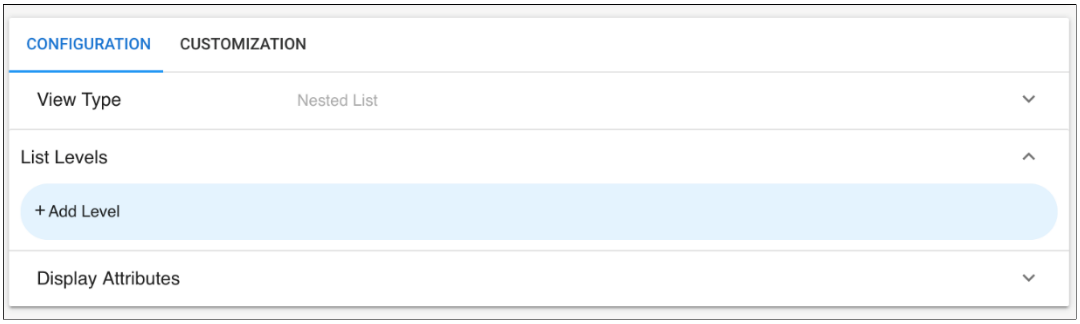


! Before starting you must read and follow the instructions in the ***New View*** help page.

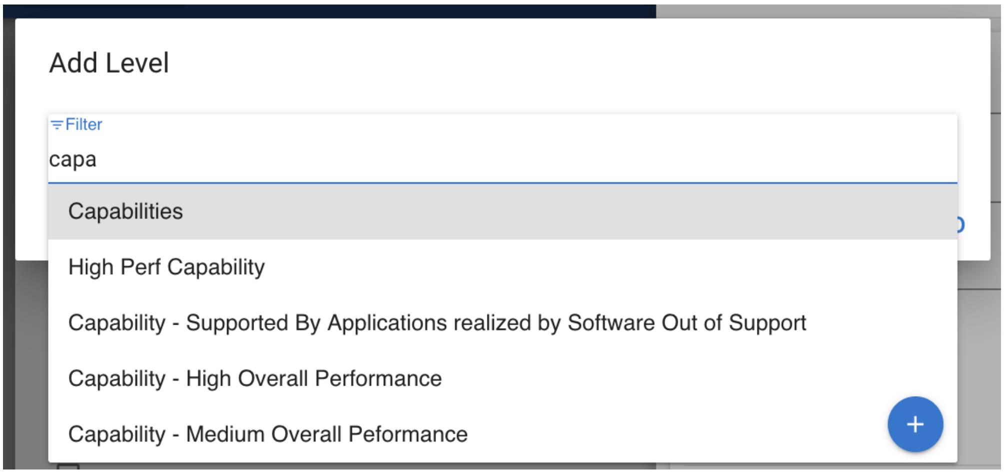
1. First, select 'Nested List' from the list of Collection Views



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



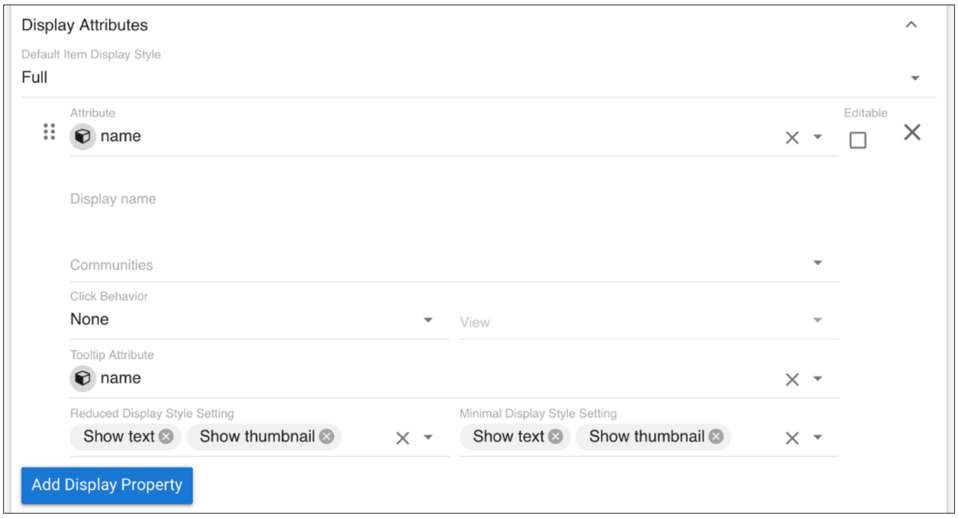
3. Click 'Add Level' and select a previously configured filter or create your own.



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

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

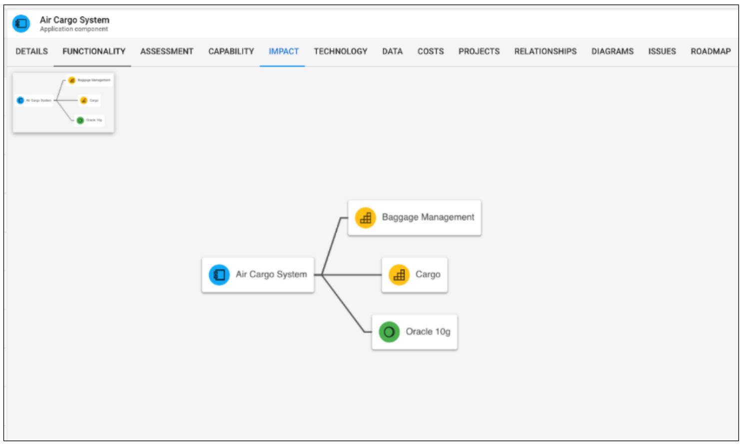
5. Select your Display Attributes and customize any details



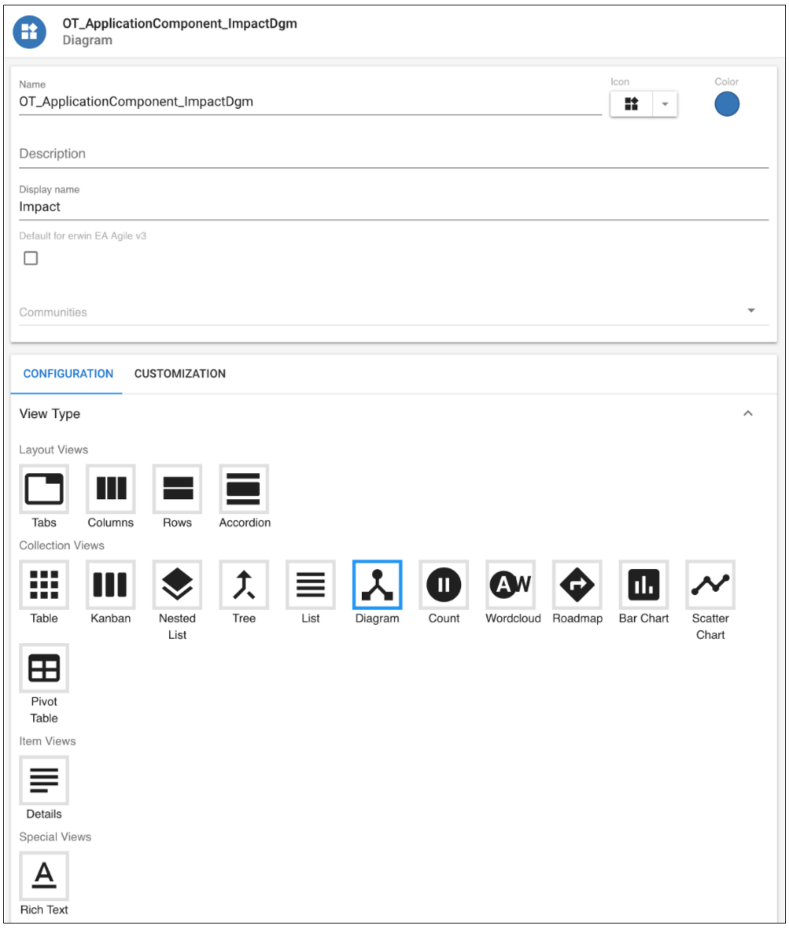
Auto-Generated Diagrams

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.



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



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

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

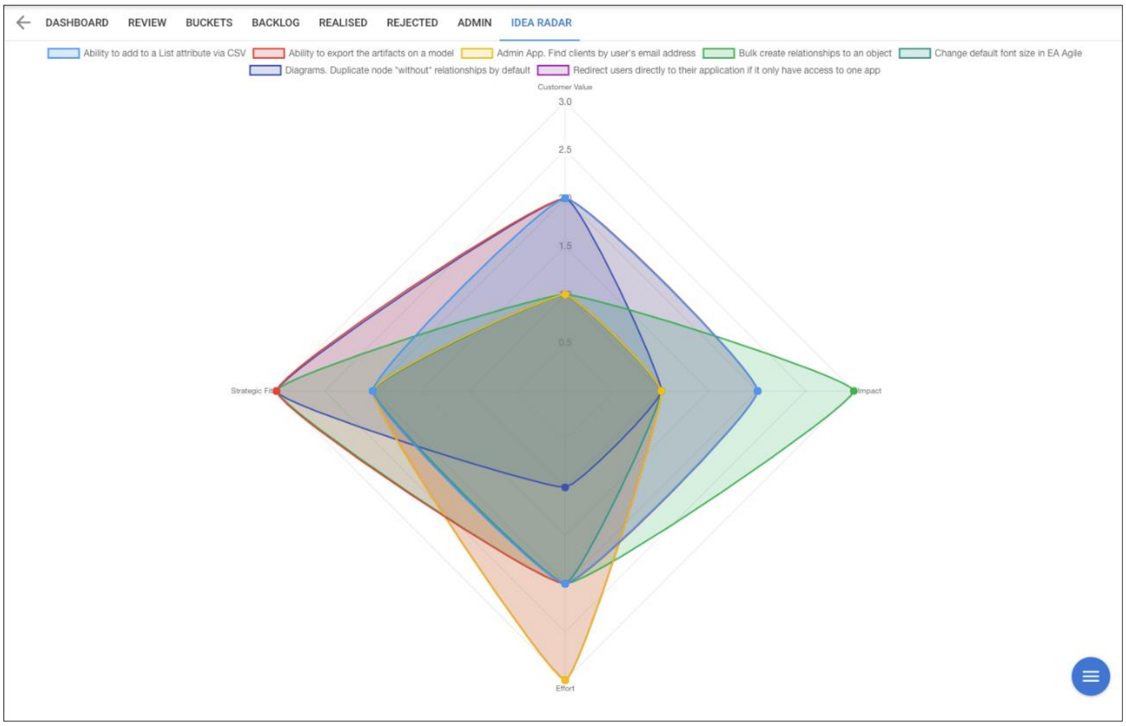


Figure A. Example of a Radar Chart analyzing multiple

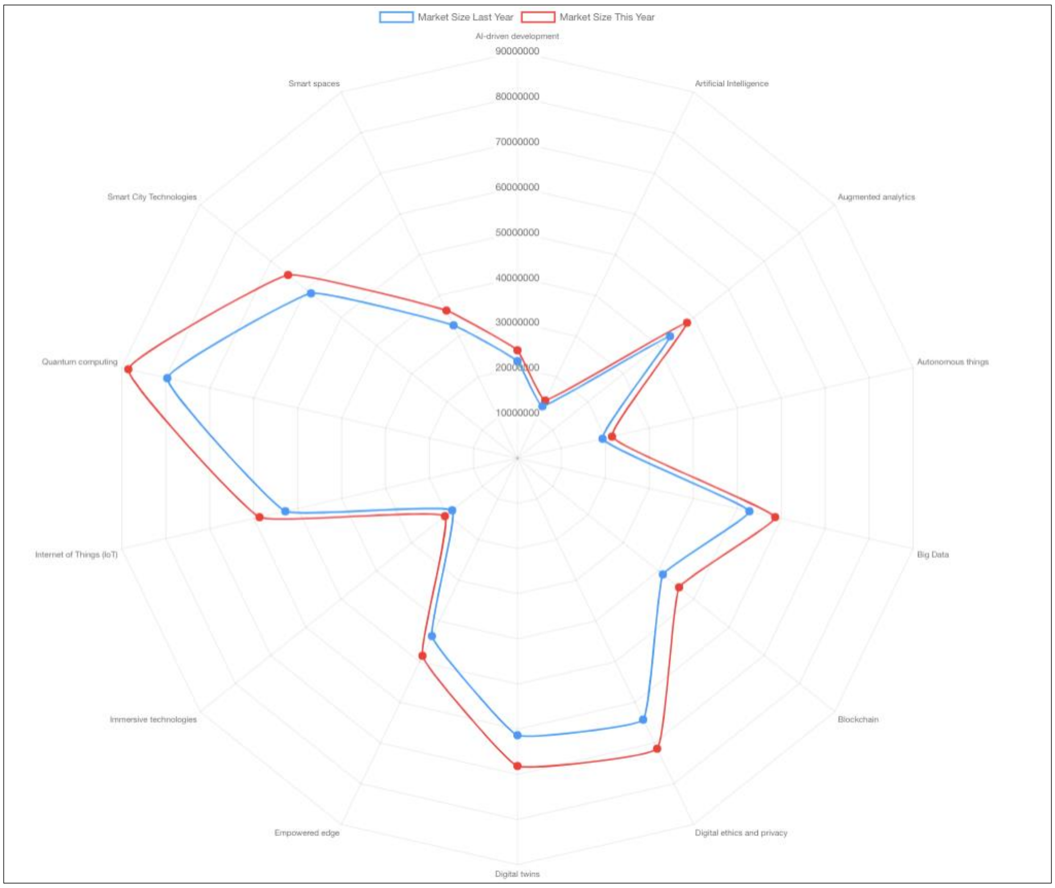
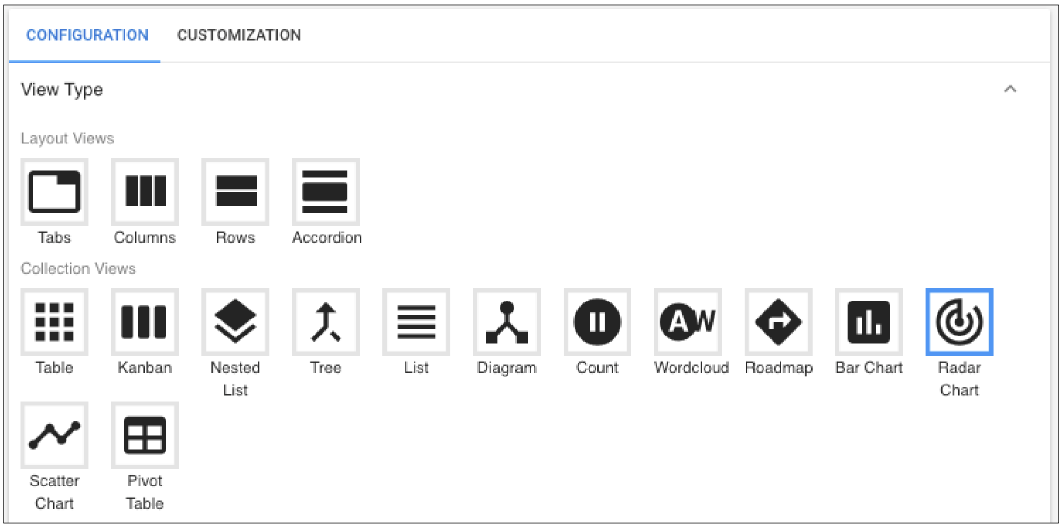


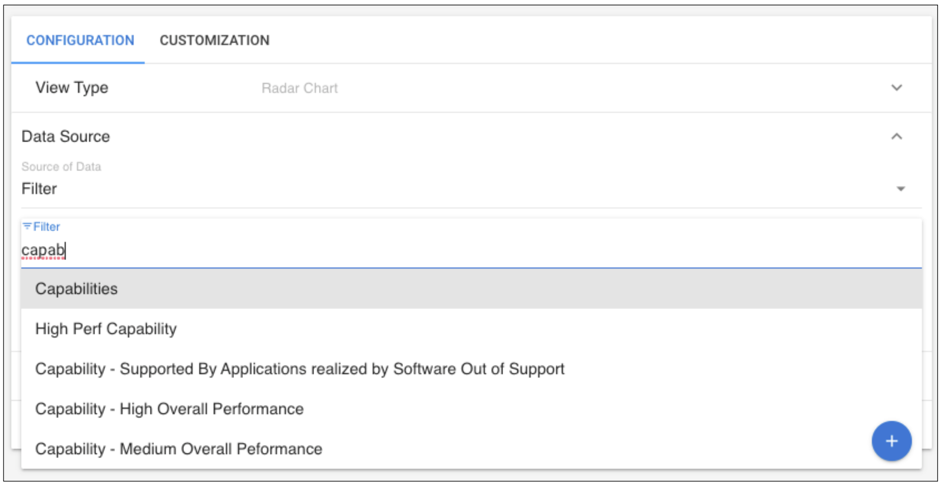
Figure B. An example analyzing two attributes

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

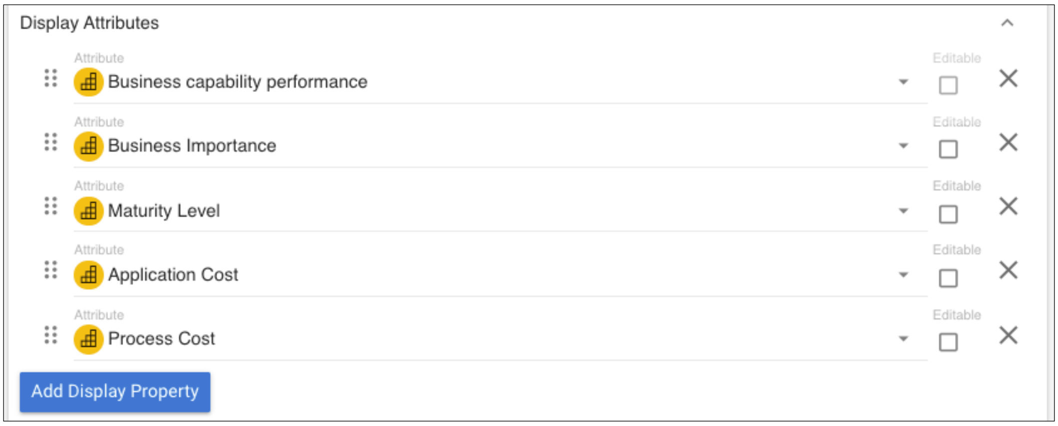
1. Select 'Radar' from Collection Views



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)



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



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)

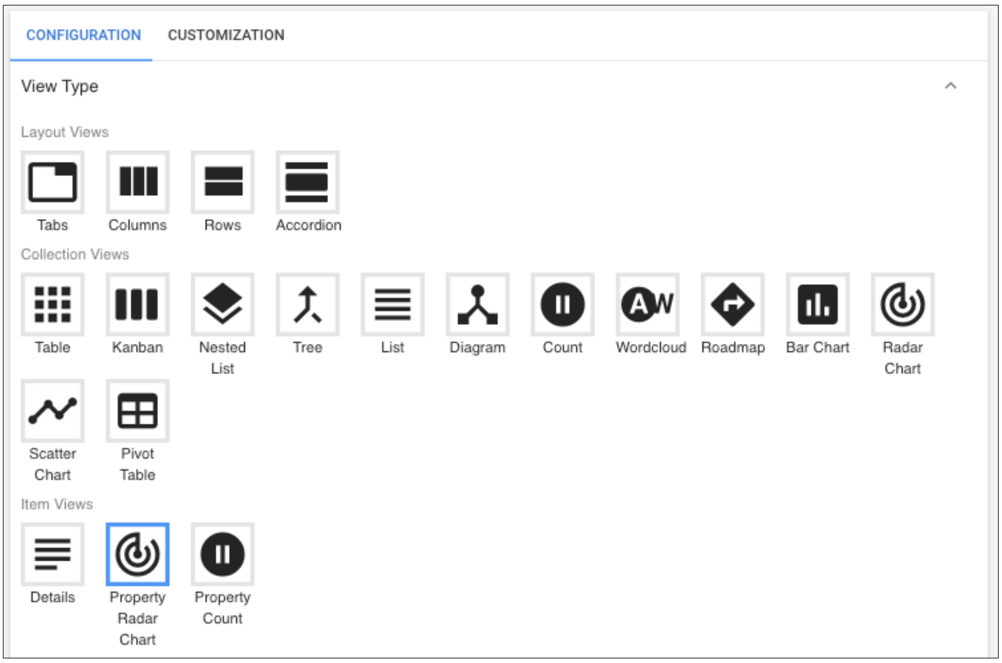
As an Item View

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



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.

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

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

For more on how to create a Filter click ***here***

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

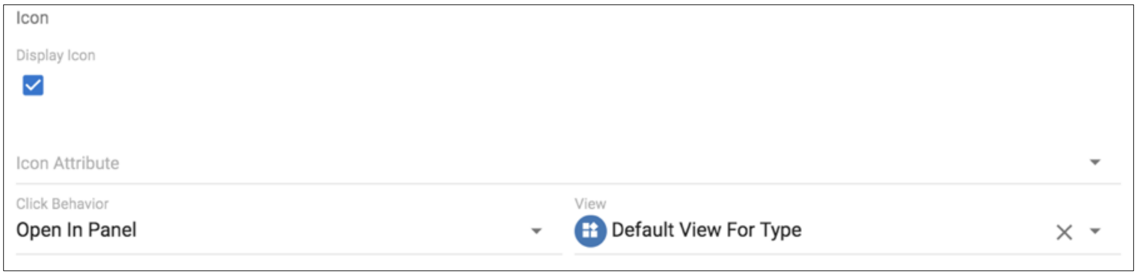
To add another Heatmap simply click ‘Add Heatmap’ and repeat Steps 2 – 6

Icon Attributes

How Do I Set an Icon Attribute?

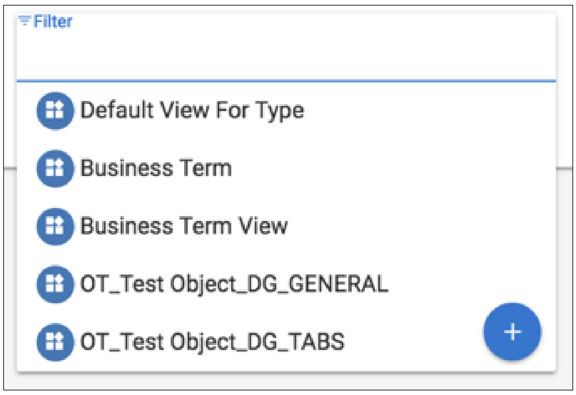
On the erwin EDGE Platform you're able to set Icon Attributes which give you the ability to display an Icon of an Object Type's Attribute

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'



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

Actions

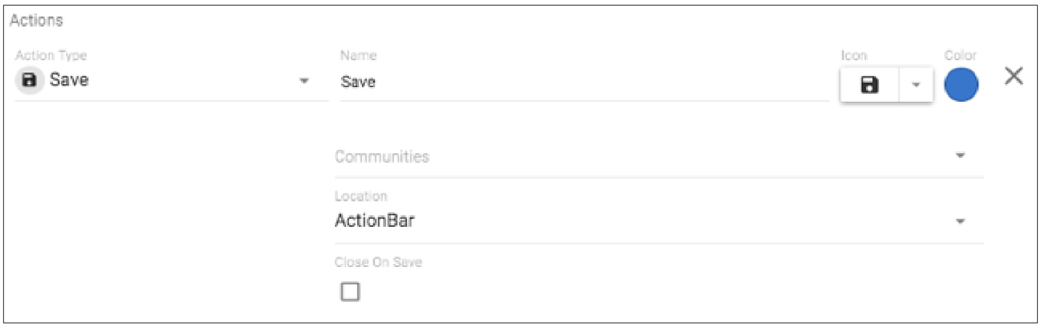
How Do I Add an Action Button to a View

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



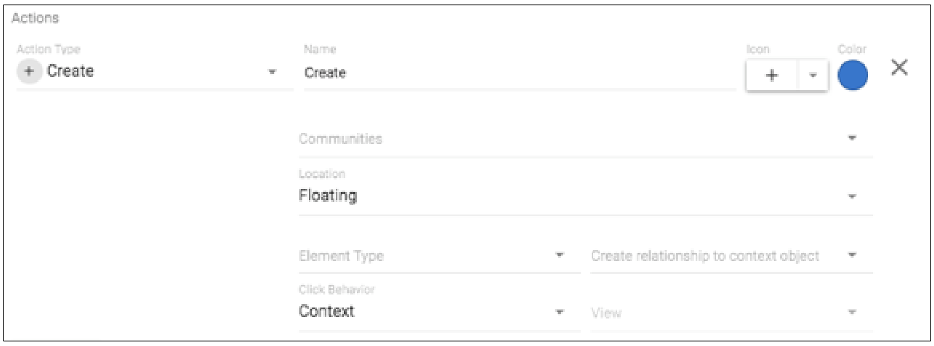
3. Click on 'Action Type' and select your Action
4. For all Actions you must set the following:
    - Name
    - Icon
    - Color

- 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

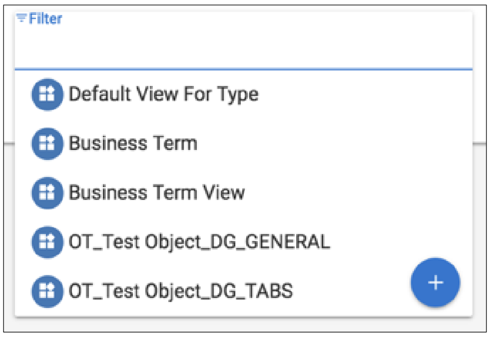


3. You can now choose whether it has a Click Behaviour. There are 5 options:

- 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

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’

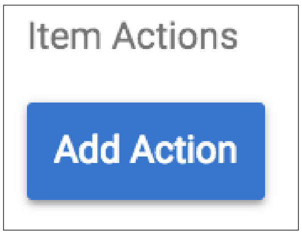


4. To add another Create Button simply click ‘Add Action’ and repeat Steps 1 – 5
5. Once finished continue with configuring your view or click ‘Save’ in the bottom right of the screen

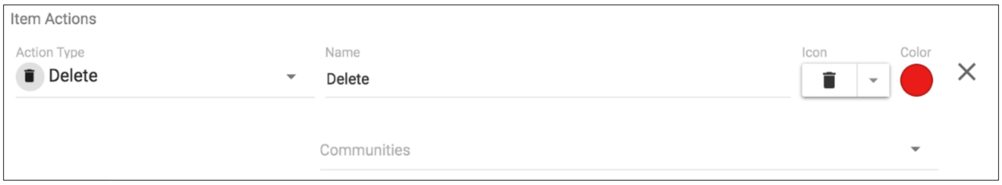
How Do I Add an Item Action to a View?

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



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



3. Click on ‘Action Type’ and select your Action

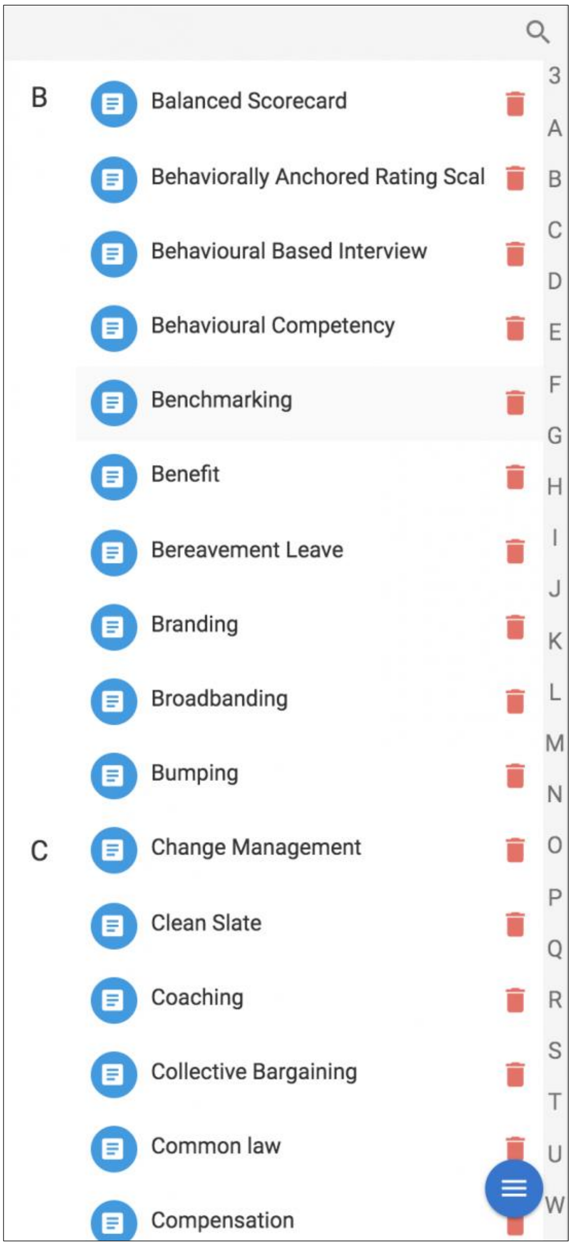
   Choose from the following: Delete, Duplicate, Create, Update, View

4. For all Actions you must set the following:

   - Name
   - Icon
   - Color
   - Communities (For more on Communities click ***here***)

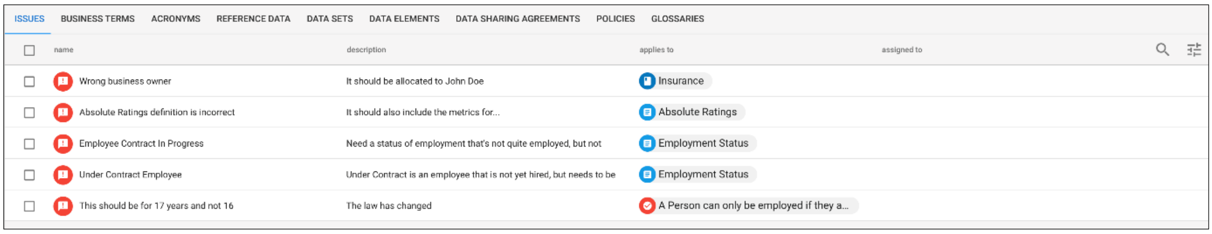
5. Create, Update & View require additional information specific to their type
6. To add another Item Action simply click ‘Add Action’ and repeat Steps 2 – 5
7. Once finished continue with configuring your view or click ‘Save’ in the bottom right of the screen

An example of the 'Delete' Item Action used within a List View

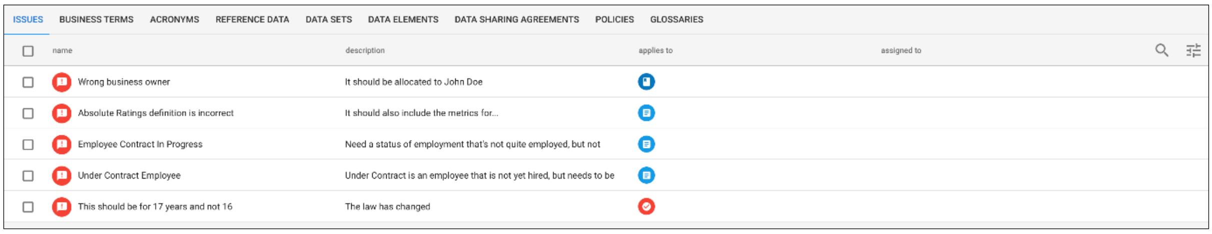


Minimal Display Attributes

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



An example of a Table with full display attributes

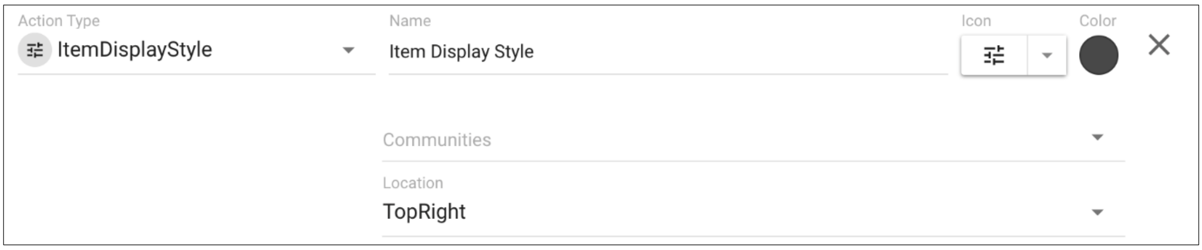


An example of the same Table with minimal display attributes

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

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'

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

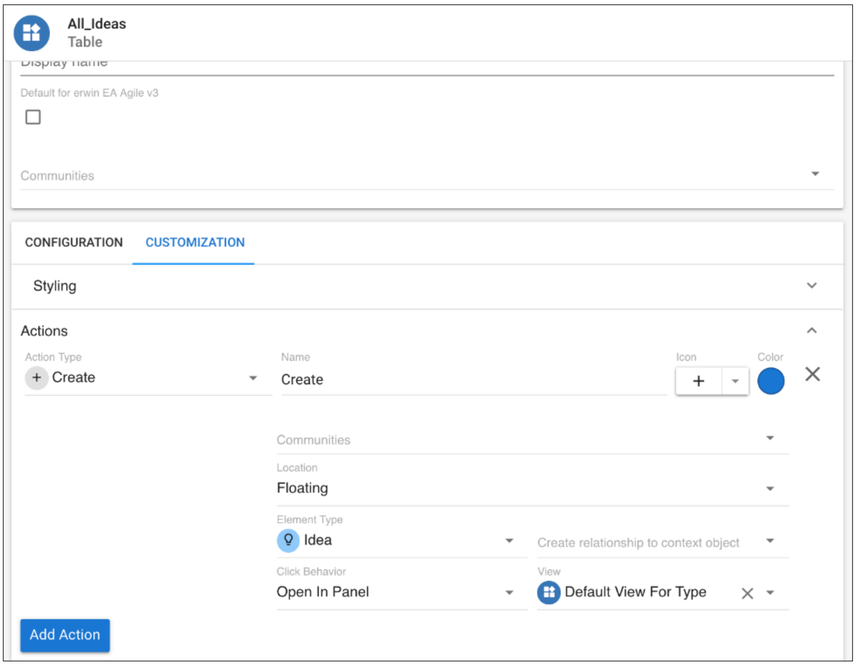

Action Type
ItemDisplayStyle
Name
Item Display Style
Icon
Color
Communities
Location
TopRight

Export as Report

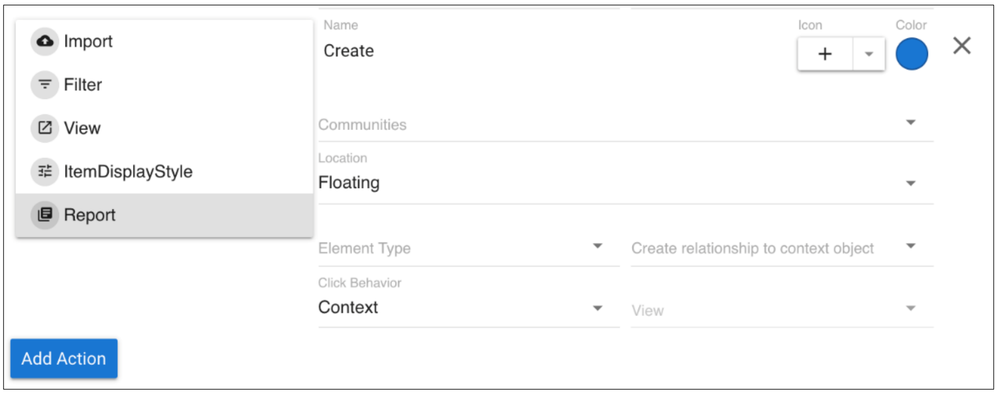
Within Collection Views, users can add an 'export as report' action which creates a business-friendly report available for download. The report differs from a standard CSV download by only returning attributes predetermined by the user either by what they have displayed in the View or what has been specified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

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

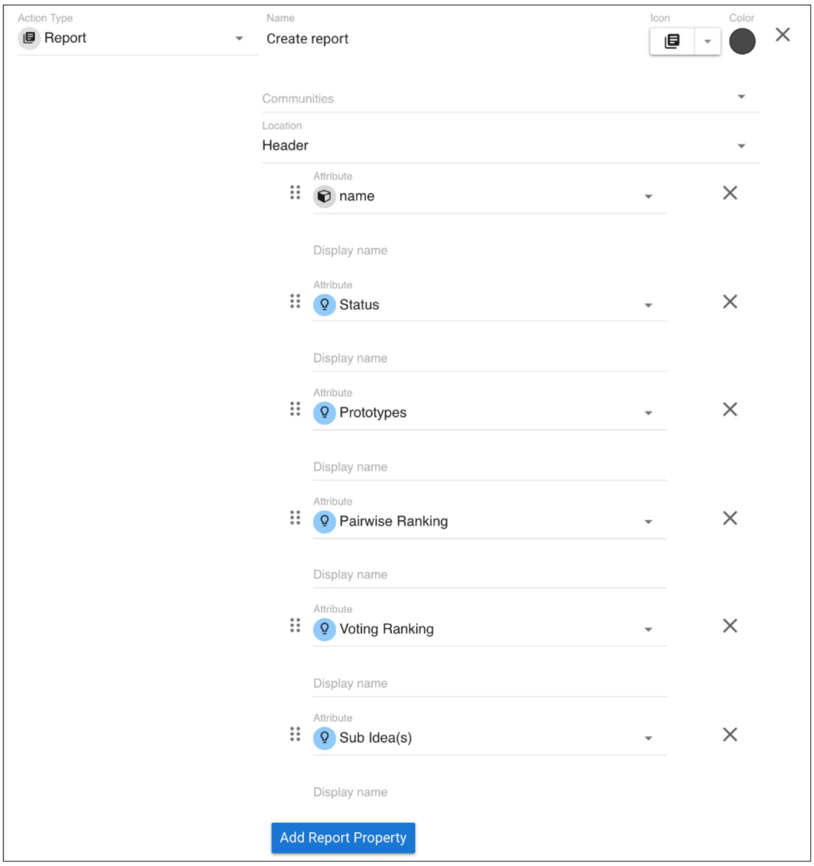
1. Under 'Customization' open the 'Actions' accordion and click 'Add Action'



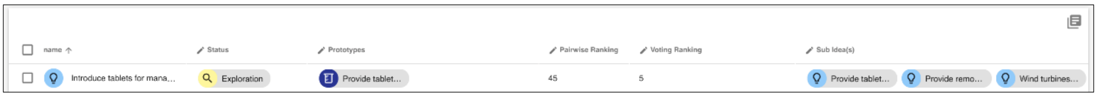
2. Select 'Report'



3. 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.



4. Click 'Save' and your Action will be added to the View



Item Actions

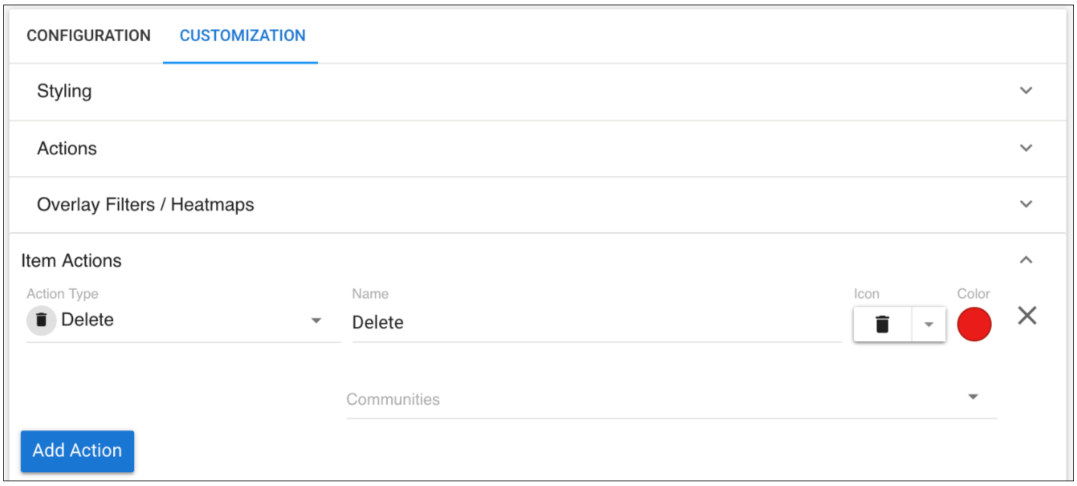
Item Actions can be applied within Collection Views to apply an Action to an instance

The following Item Actions are available in EA Agile:

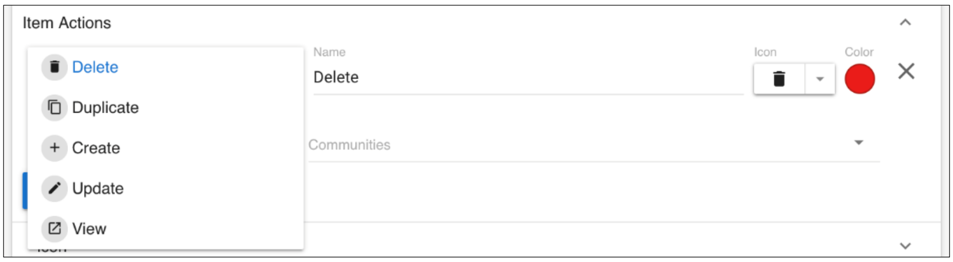
- Delete - Delete an Object Instance
- Duplicate - Duplicate an Object Instance
- Create - Create an object of any type with or without a relationship to the Object attached to the Item Action
- Update - Add a button to update the value of an attribute to a pre-defined value
- View - Navigate to another 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

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



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



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.

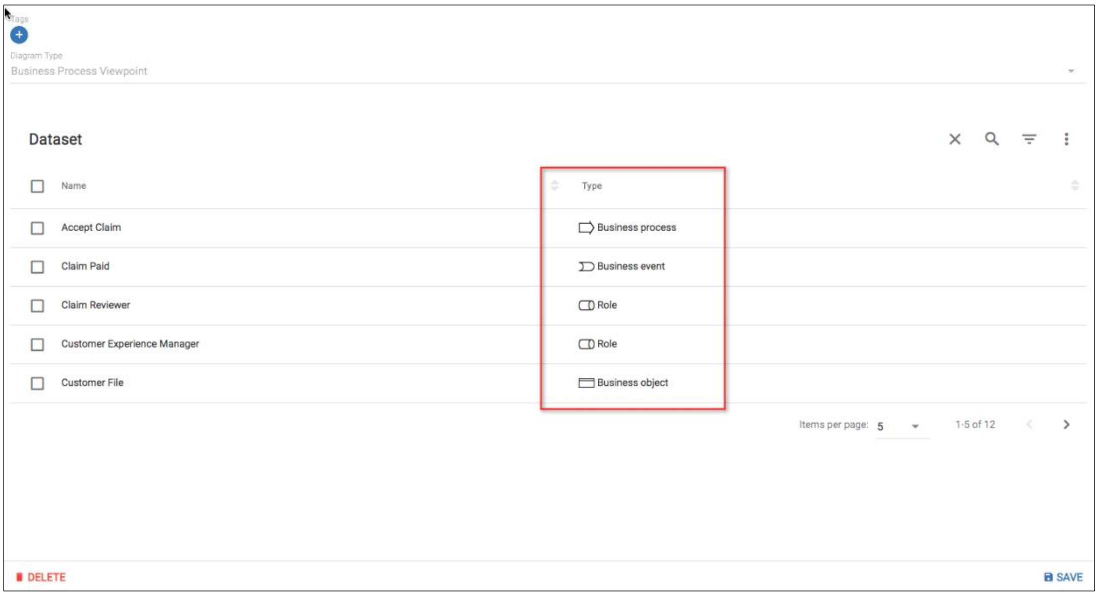
Each diagram type is pre-defined with the object types and relationships that the diagram supports.

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

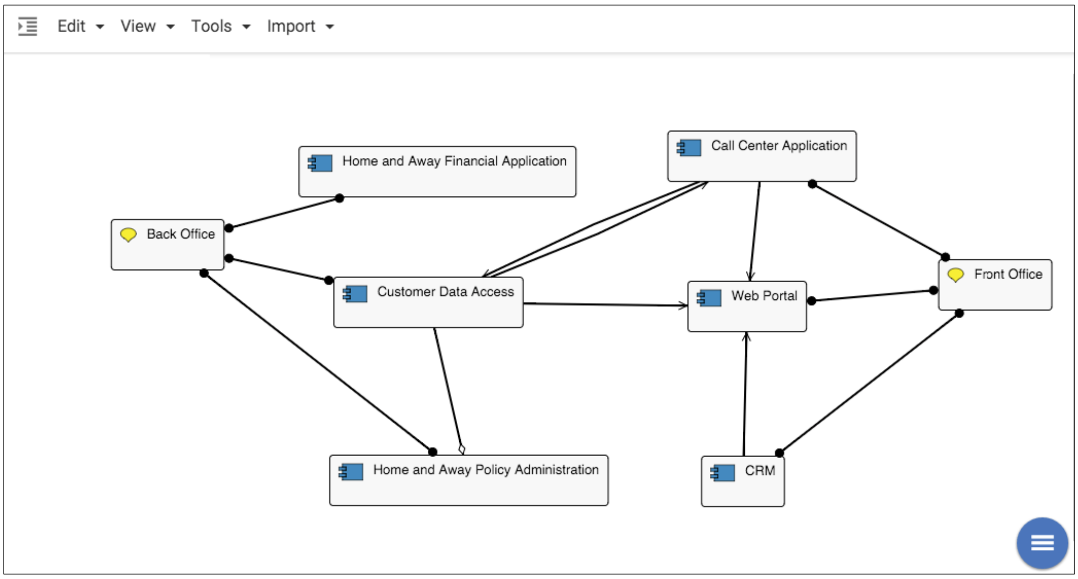
To modify the diagram contents, users can use the **search** function to create queries and find objects within the model - these can be simple, such as 'Name contains claim', or be more complex with multiple query rules defining the dataset the user is looking for. Multiple searches can be performed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

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.



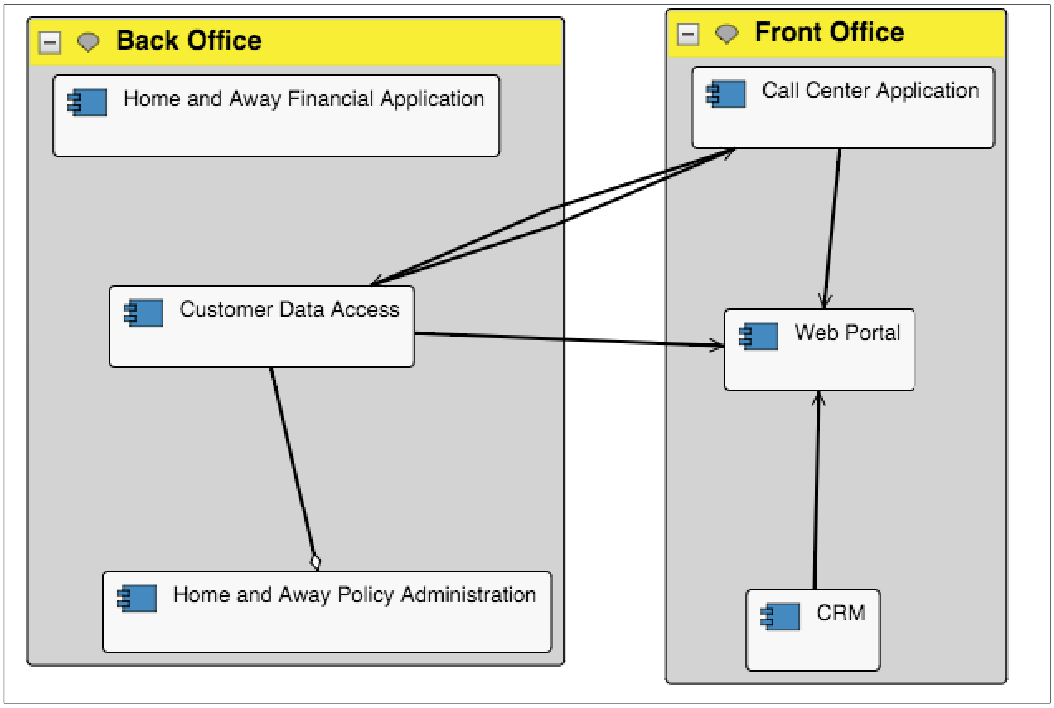
Once complete, select the Diagram tab at the top of the page, and the diagram will be drawn automatically from the objects in the Dataset.



Box in Box relationships

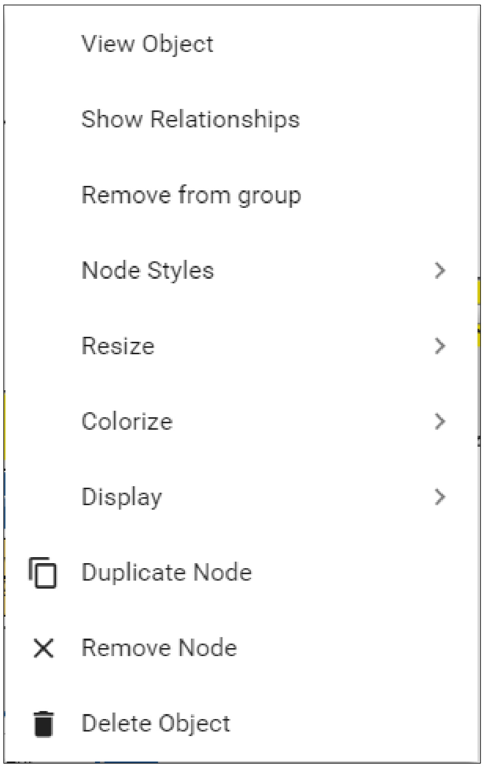
Any relationship can be represented in box in box style.

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).



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

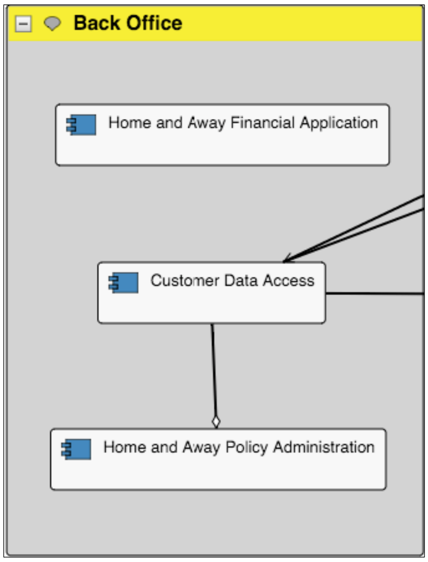
Box Resizing

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.

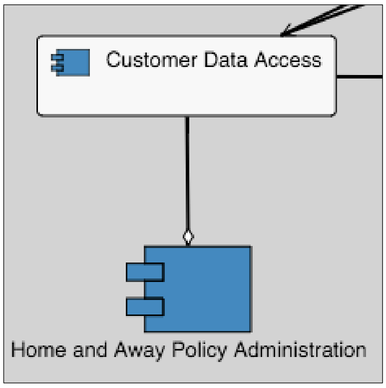
This will allow you to drag the boundary to a minimum size. The parent box will never shrink below the size you resize it to.

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



Node v Box Representations

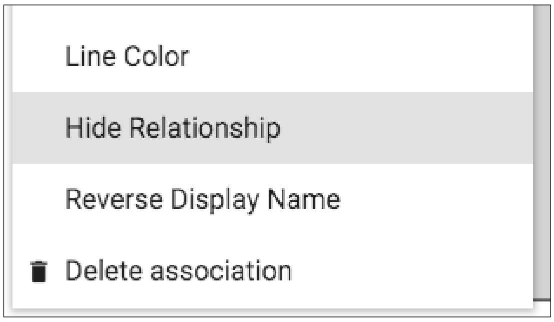
You may also use the right hand mouse click to convert shapes to small, big or box style.



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.

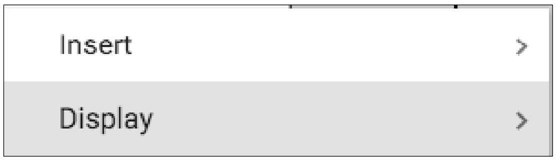


You can hide the selected relationship on the diagram. This will give the relationship a ‘state’ of hidden.

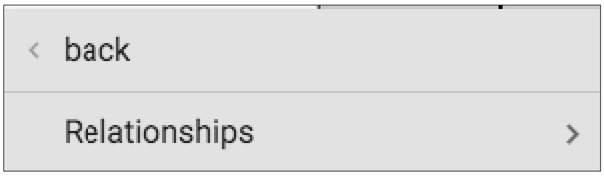
A relationship will also be set to a state of hidden upon being 'deleted' on the diagram.

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

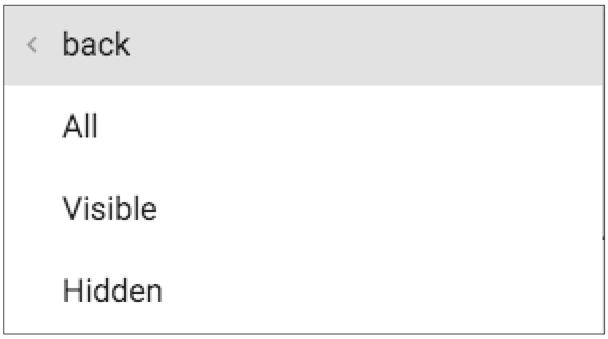
The diagram has a menu to display relationships according to their ‘state’ - right click on an empty space to see this.



Select **Display**.



Then **Relationships**.



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

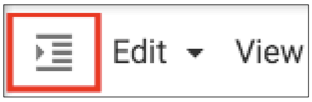
Users can draw symbols and lines onto the surface of diagrams to create or modify views of the model and the underlying model itself.

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.

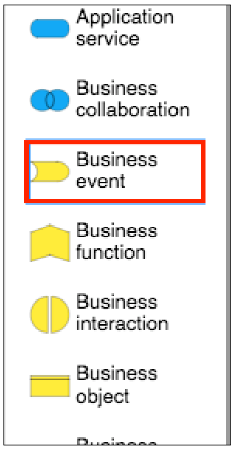
The symbols available to you will be filtered to the assigned object types for the diagram type.

Drawing Basics

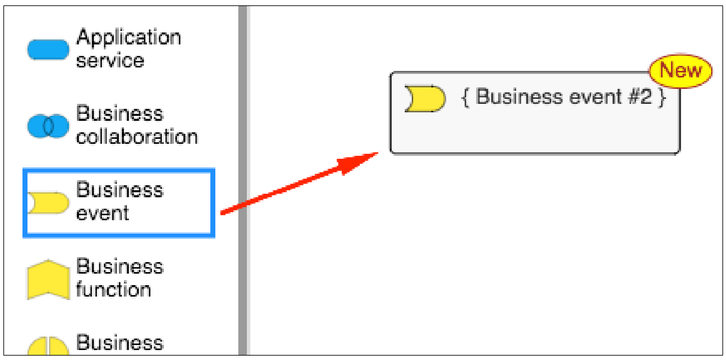
Press the expand button to see the drawing pane.



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 double-click 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;

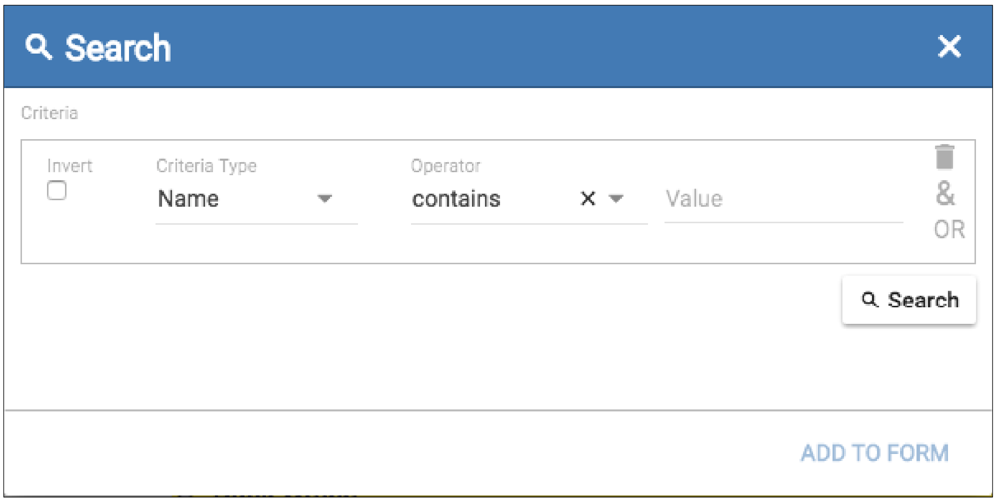
- continue to type a new name to create a new object, or
- select an existing object from the list.

Add one or multiple existing objects to a diagram;

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

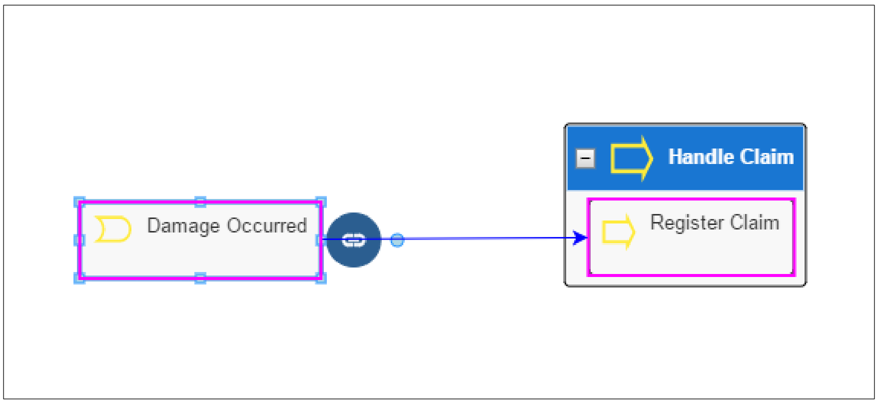
⇒

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



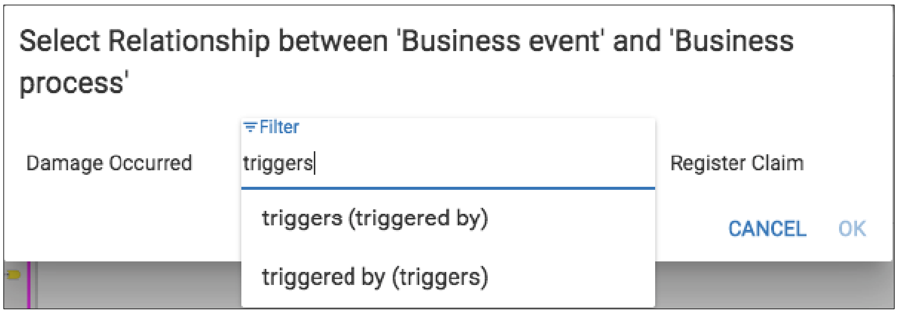
To relate objects on the diagram:

– 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.

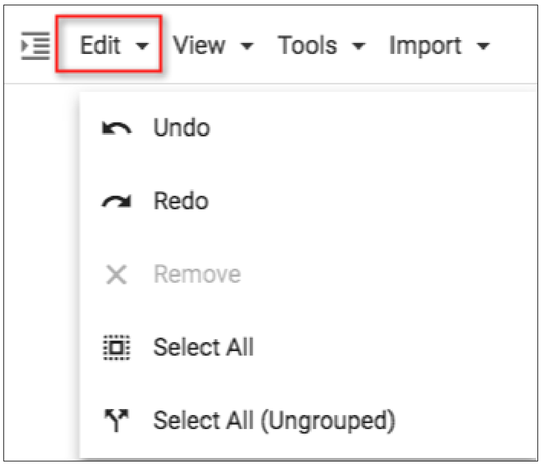
If no Select Relationship screen is displayed, there may be only one type available between the two symbols, and this has been applied.



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

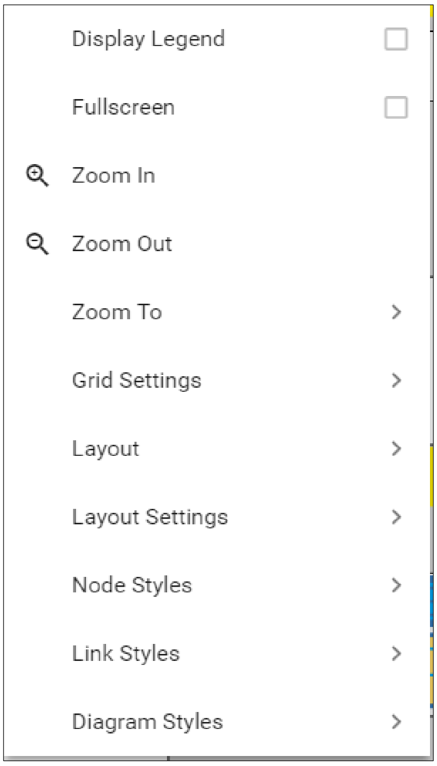
The menu bar contains Edit, View, Tools, and Import menus:

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.)



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

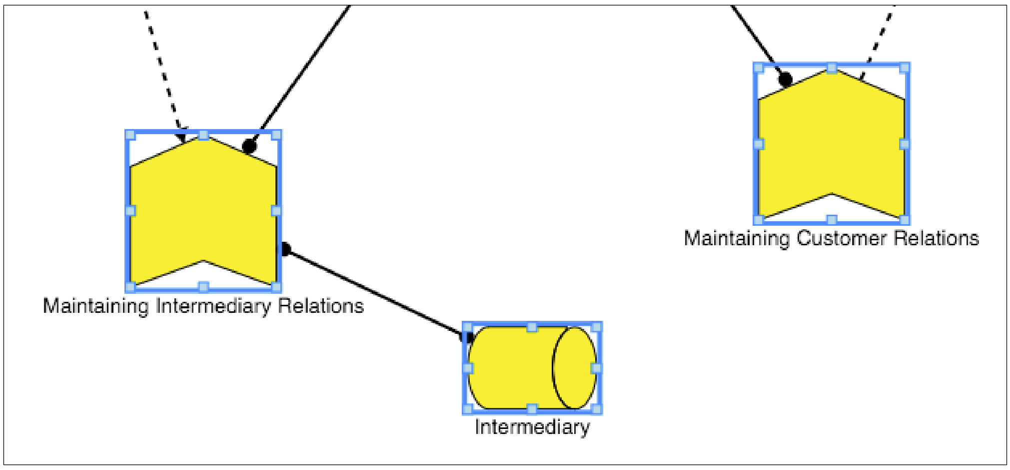
Aligning Nodes

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".

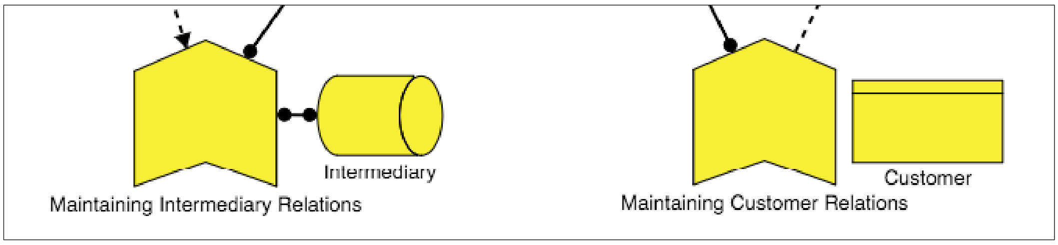


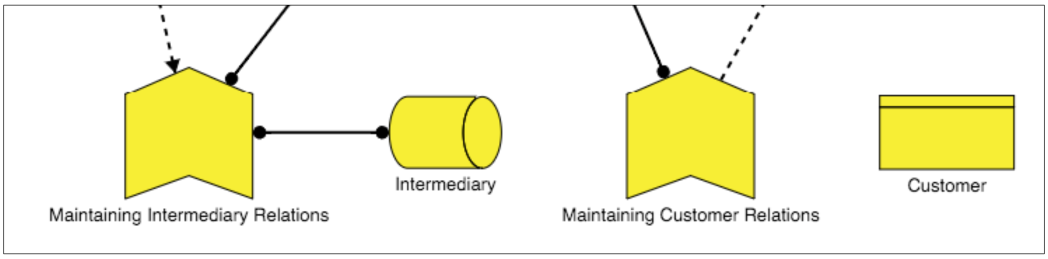
Aligning symbols on their centres is best achieved by enabling the **Snap To** option.

Spacing Nodes

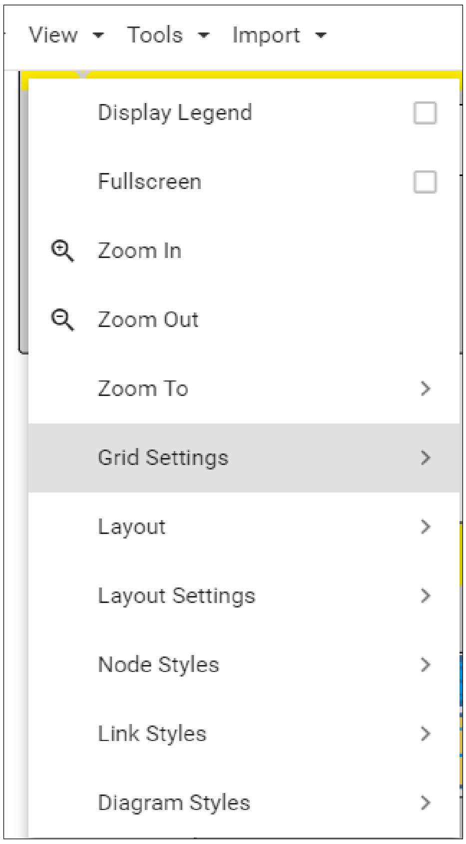
Multiple symbols can be spaced apart or separated by the same amount of space, in rows or columns.

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

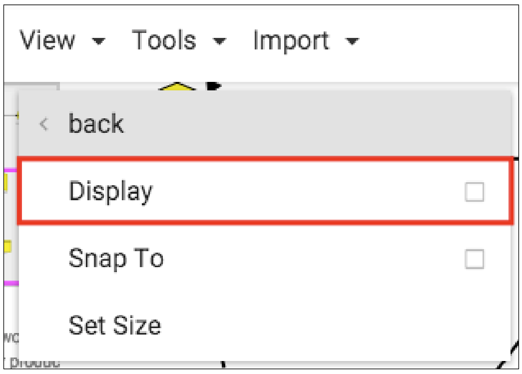




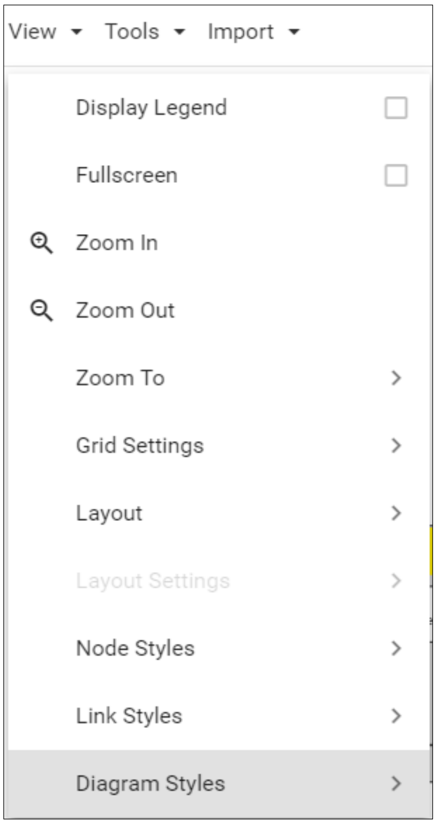
Grid Settings - the Grid Settings submenu can be accessed from the **View** menu.

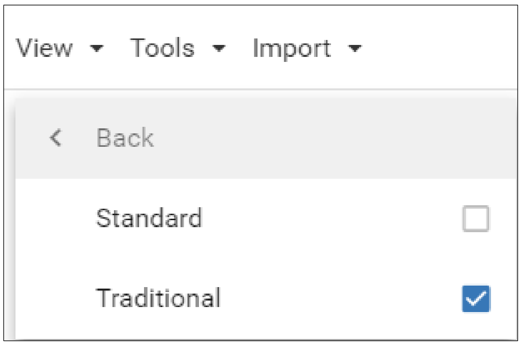


The Grid can be displayed, its 'size' set to a different value, and symbols can be moved to snap to the grid.

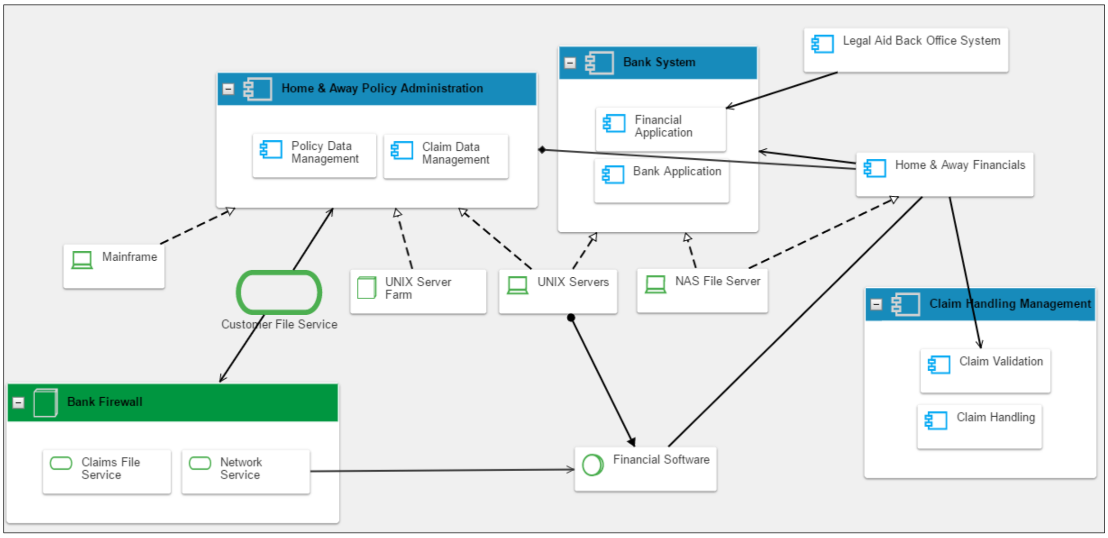


You can also change the overall styling of a diagram using Diagram Styles, this can be selected from the view menu and there is two options to choose from, standard or traditional.

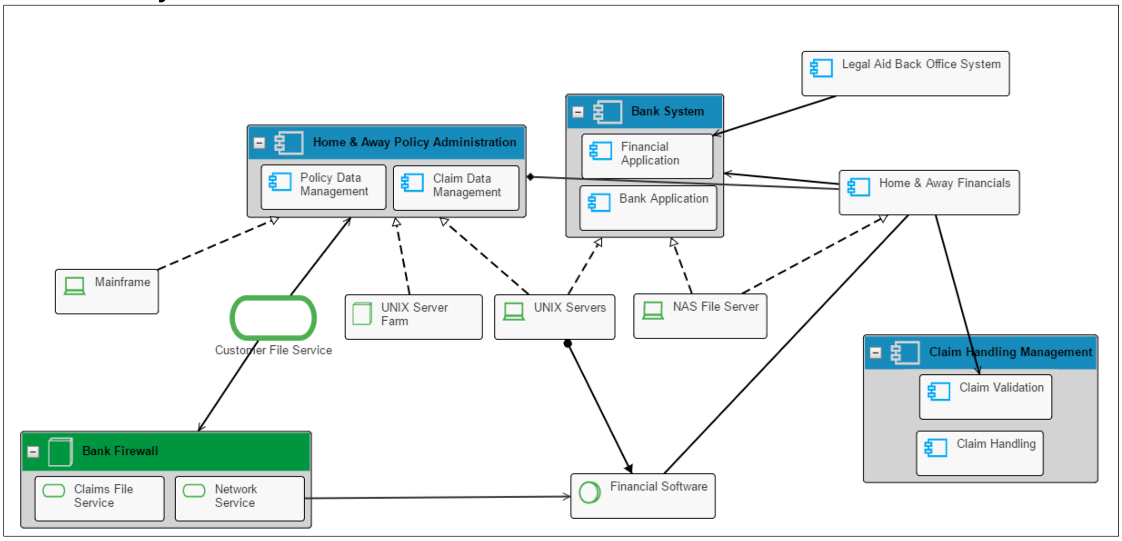




Standard Style



Traditional Style



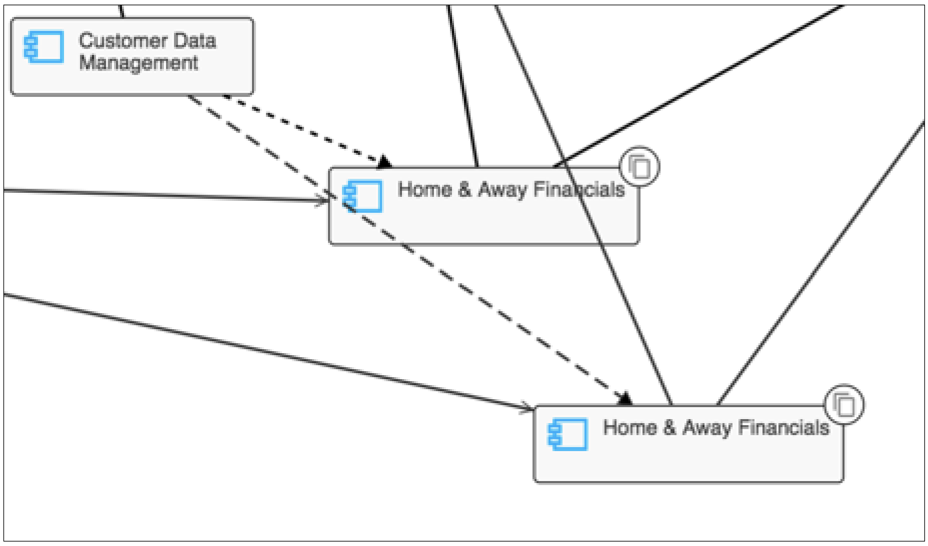
Multiple object instances on diagrams

Objects can appear on a diagram multiple times

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

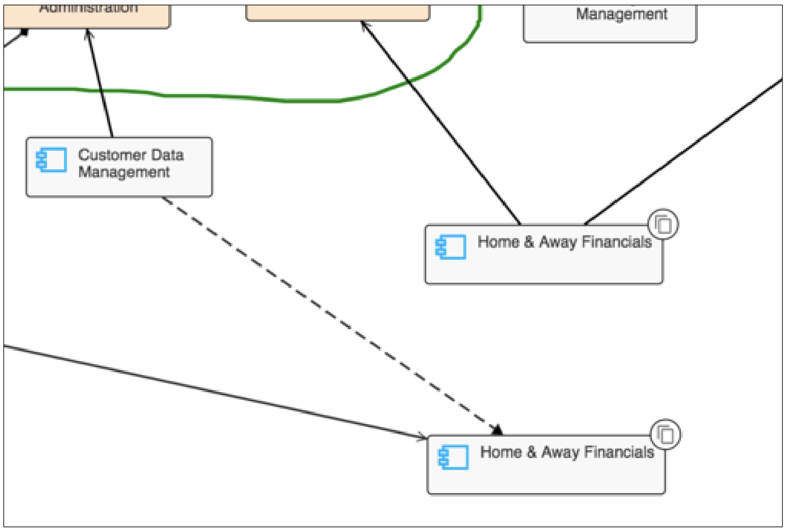
The duplicate will be added, along with all of the existing relationships and formatting from the original - a duplicate icon will be added to both symbols

Neither object is the master - they are representationally consistent.

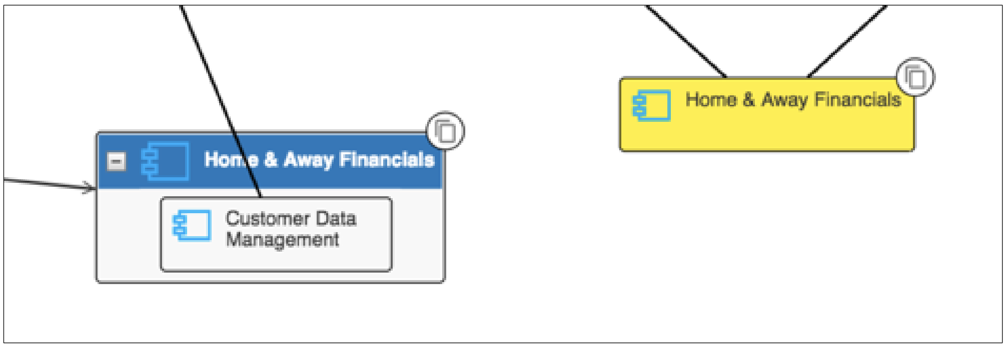


The user can then amend the duplicate object symbol and hide/show a different set of relationships to the first, as they require.

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

Keyboard and mouse commands are available on diagrams.

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

Add Related Objects

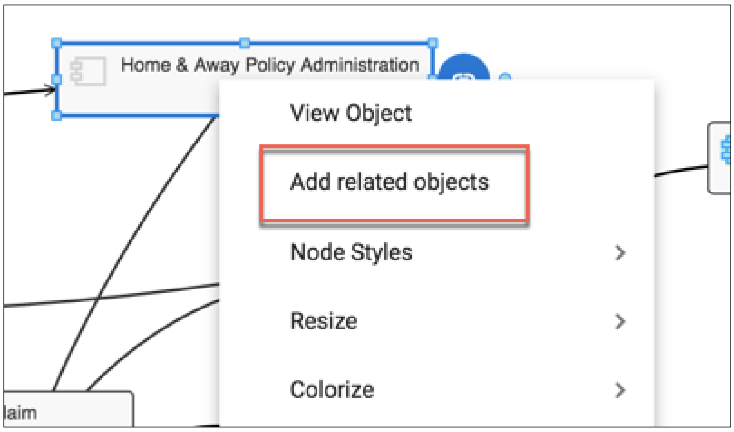
The Add Related Objects function on diagrams allows you to explore the content of the model in the current client area. It displays a graphical view that shows the relationships between objects, and allows you to quickly slice across the metamodel, focussing in on areas of interest e.g. If an application 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

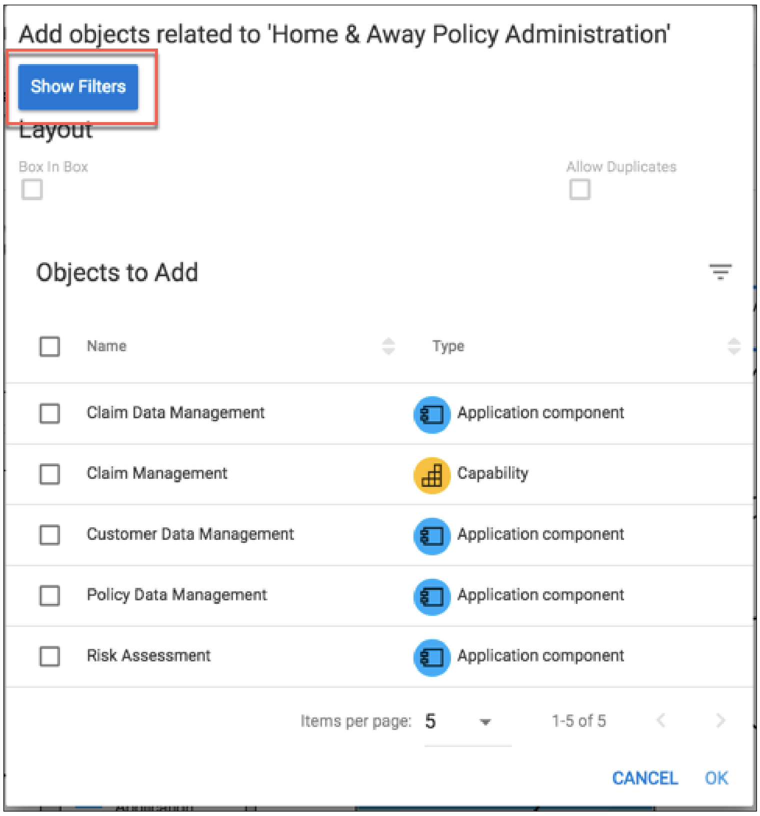
Radial Layout

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



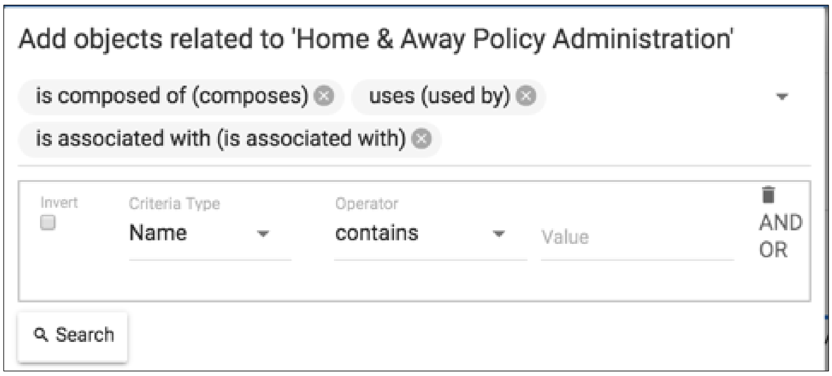
A list of ***objects to Add*** is pre-populated with any object that has a relationship to the object you right clicked on

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



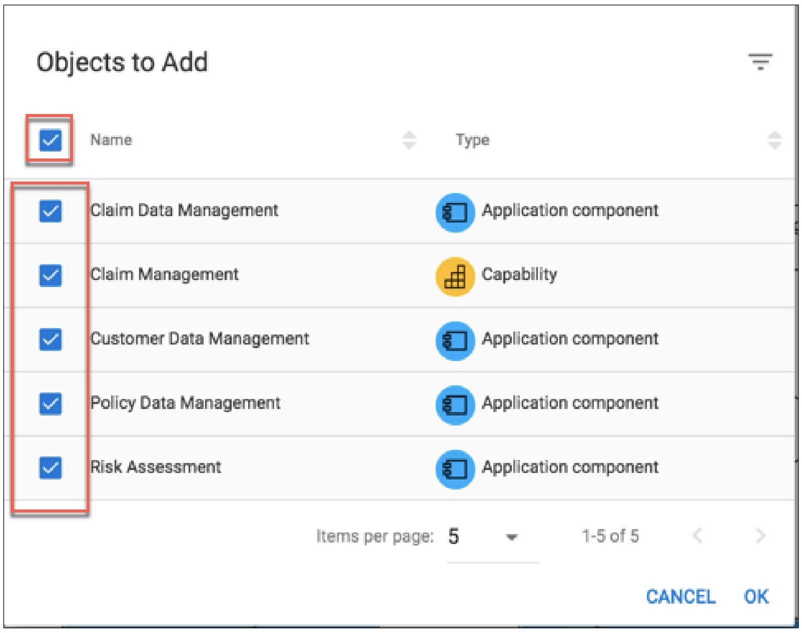
By default, all relationship types are populated within the search - Users can remove these as they wish

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

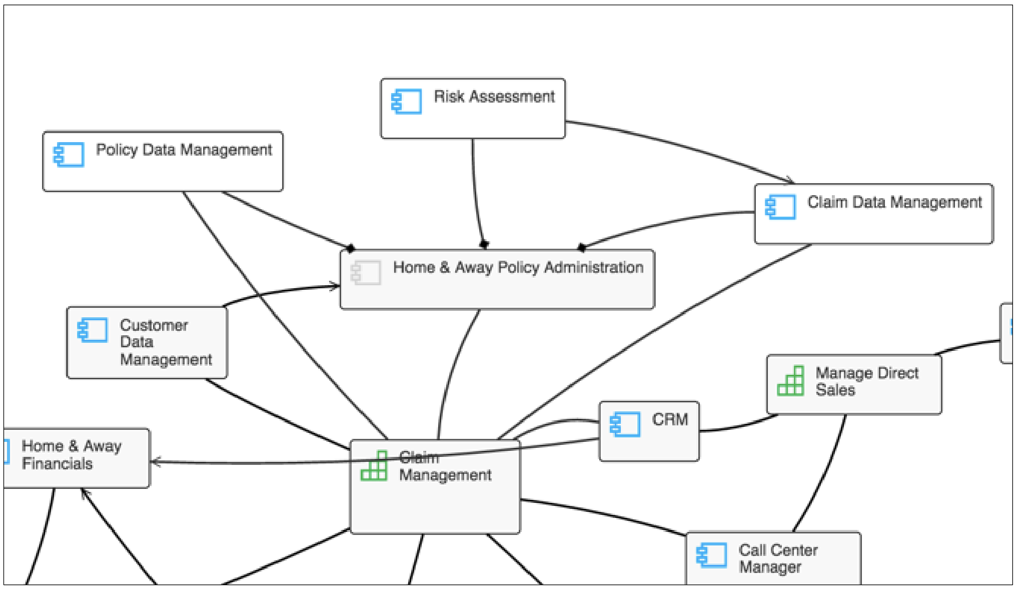


Once users click the Search button, the list is filtered as they requested

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.



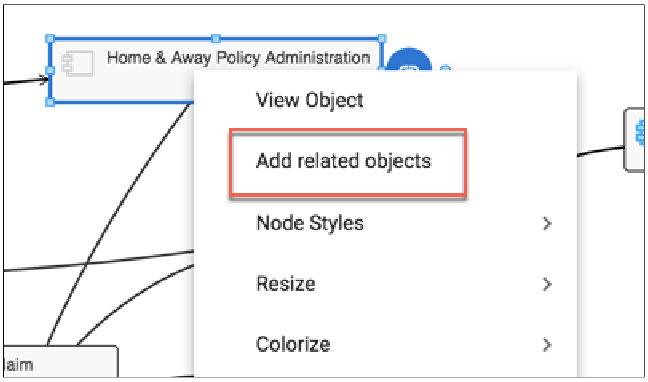
If users select to add related objects again, the process is additive. If users do not select the Allow Duplicates option, then objects will only be allowed to appear on the diagram once.



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

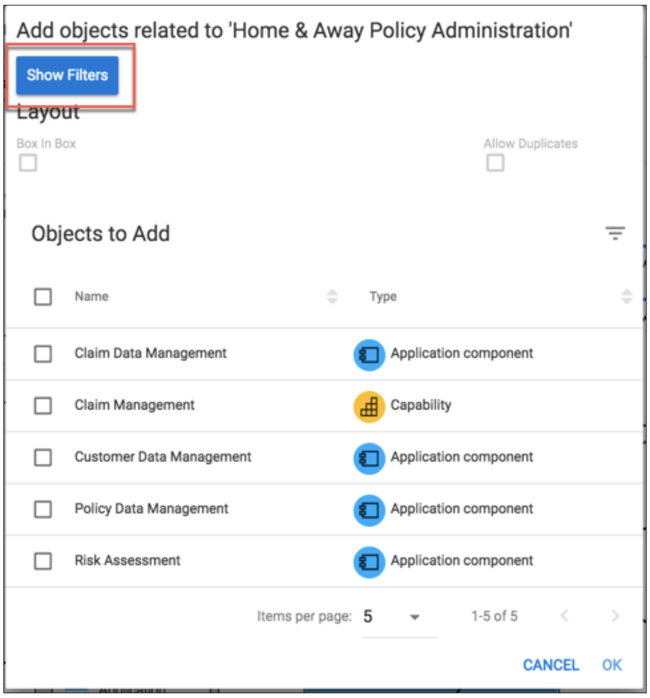
Box-in-Box layout

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



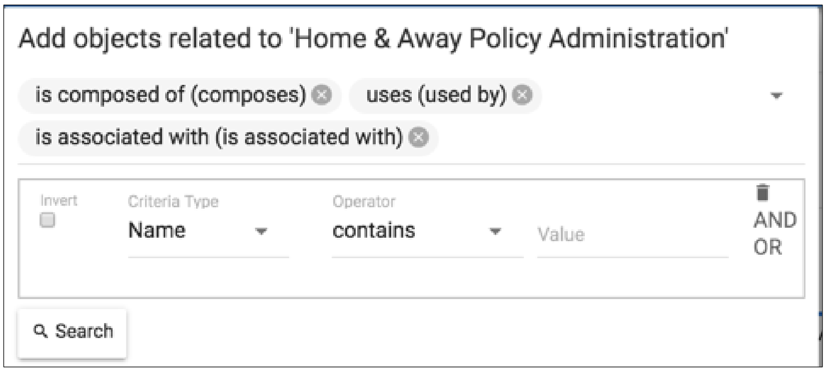
A list of ***Objects to Add*** is pre-populated with any object that has a relationship to the object you right clicked on

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



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

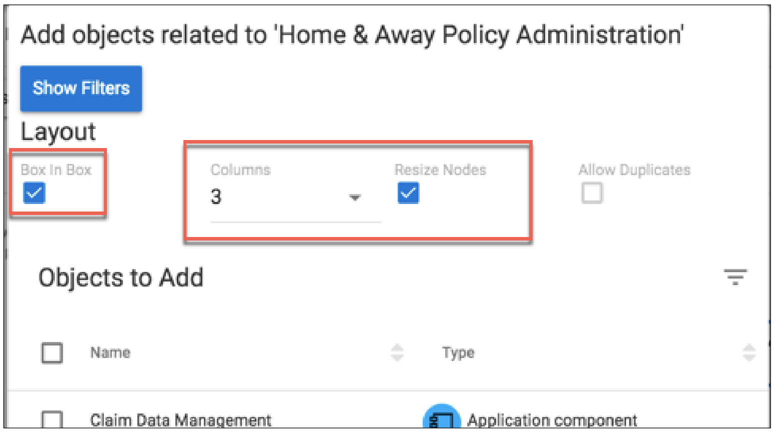
Users can also use smart queries searching to produce very specific criteria e.g. Type = Application component or has a relationship to a business service Z with attribute X set to Y



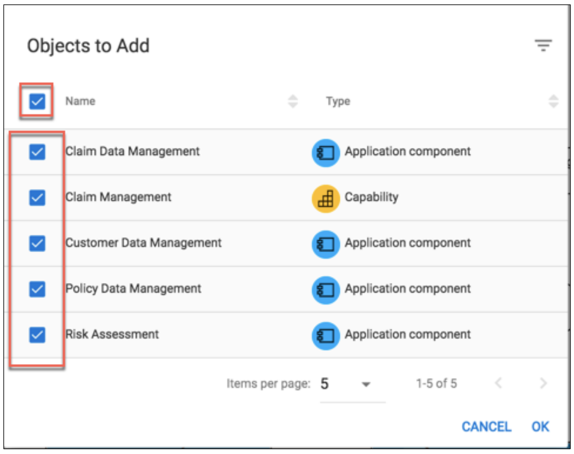
Once users click the Search button, the list is filtered as they requested

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

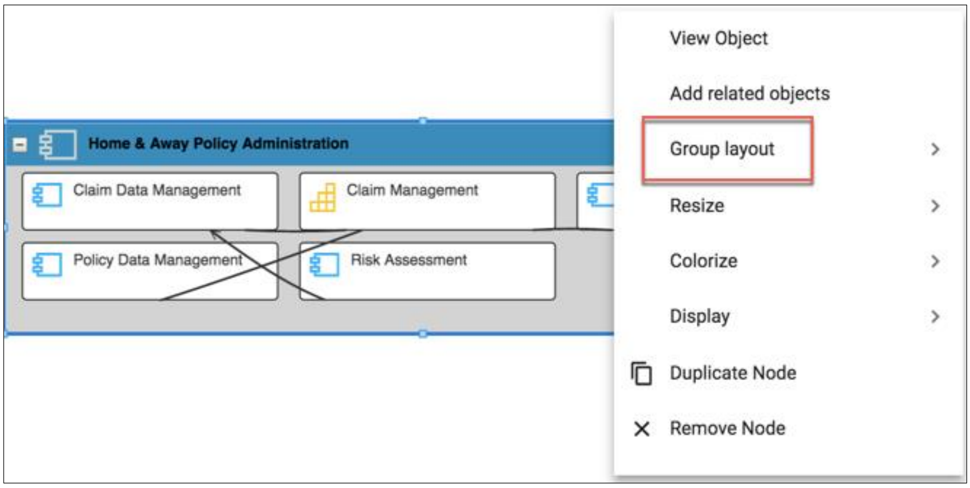
- choose how many columns they would like the objects they are adding, added into
- If they would like to resize all of the boxes to be the same size as the biggest - to create a uniform display

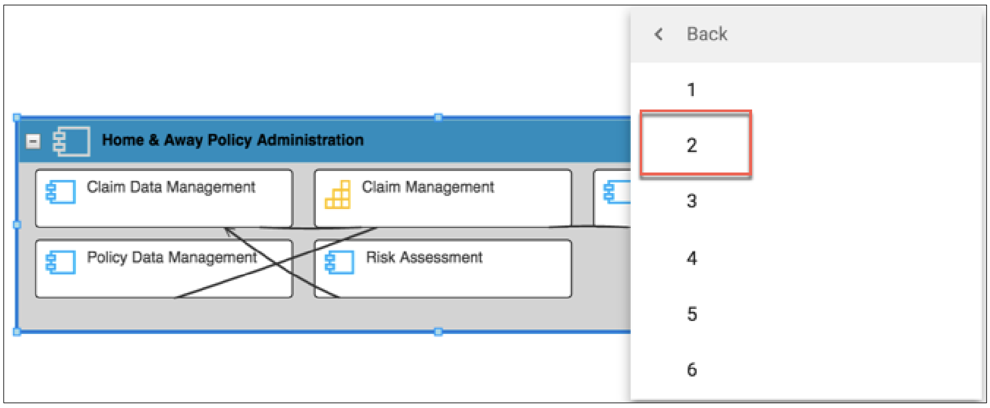


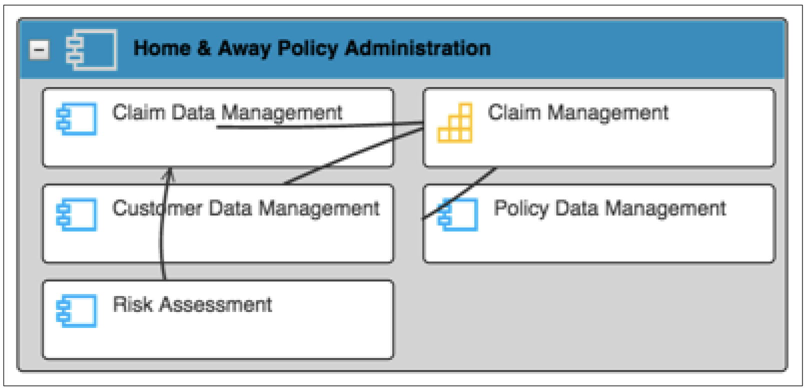
Users can select some or all of the objects within the list and when they select OK, the chosen objects will be added into the diagram in a box in box layout, within the starting box.



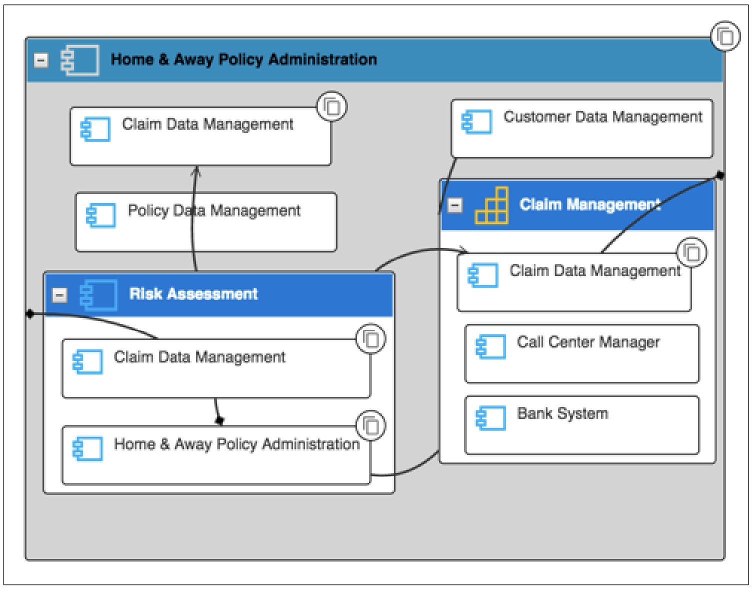
Users can change the layout of a group, by **right clicking the group object** > **Group layout** and choosing to resize all shapes in the group, or setting the number of columns







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.

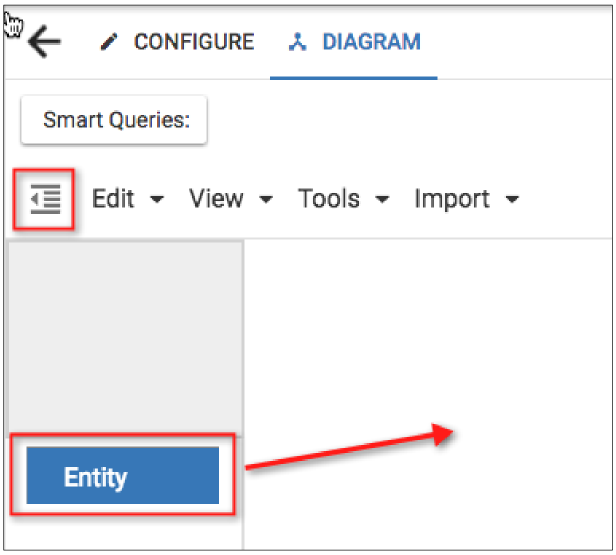


Data Modelling

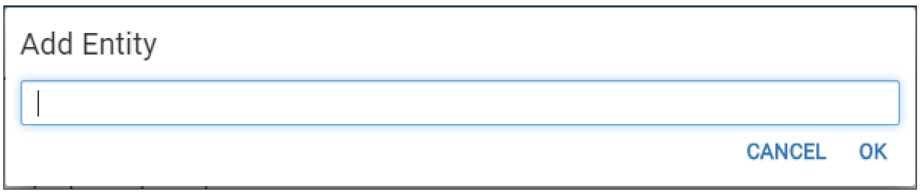
Data modelling diagrams are created using the diagram type, **Entity Relationship Diagram.**

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.

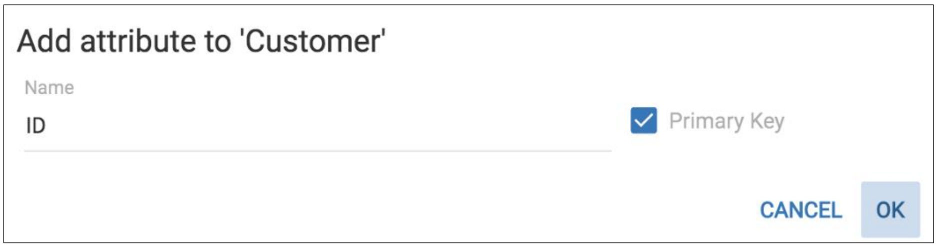


The Add Entity dialog will expect a new name to be entered, or an existing name to be selected.



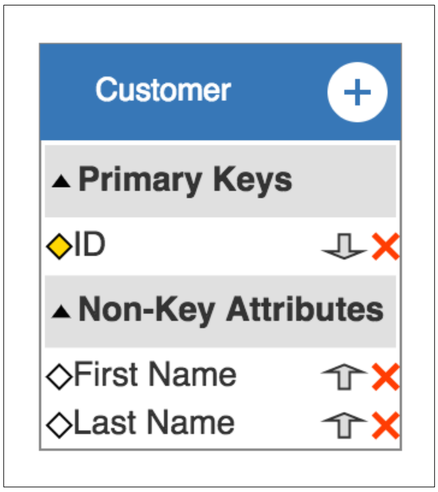
Clicking **OK** or pressing the Enter key, will add the Entity to the diagram. Selecting an existing name will add that Entity to the diagram.

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.



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".



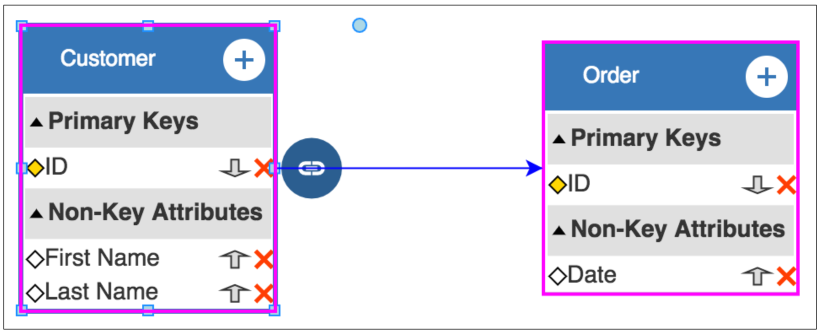
Attributes are displayed inside their Entity, but the model is not updated until the diagram is saved.

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**

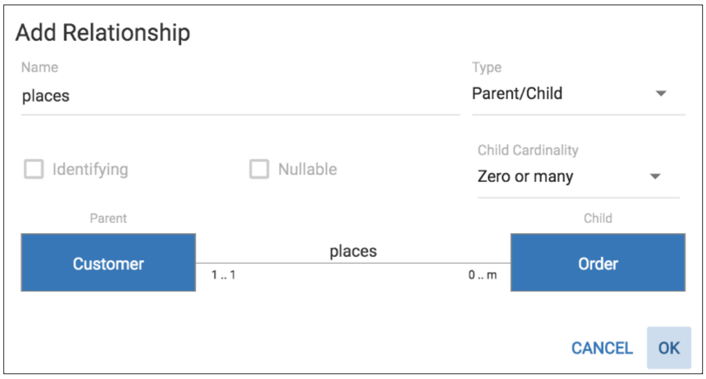
Save the diagram regularly to ensure that the diagram and model are updated.

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.



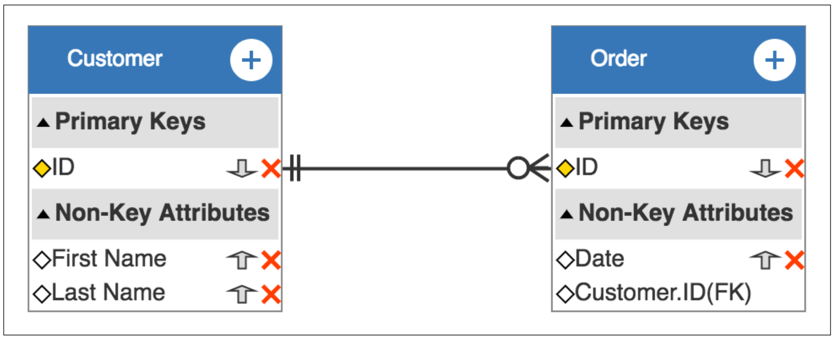
The Add Relationship dialog will require a Name to be entered before clicking **OK.**



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

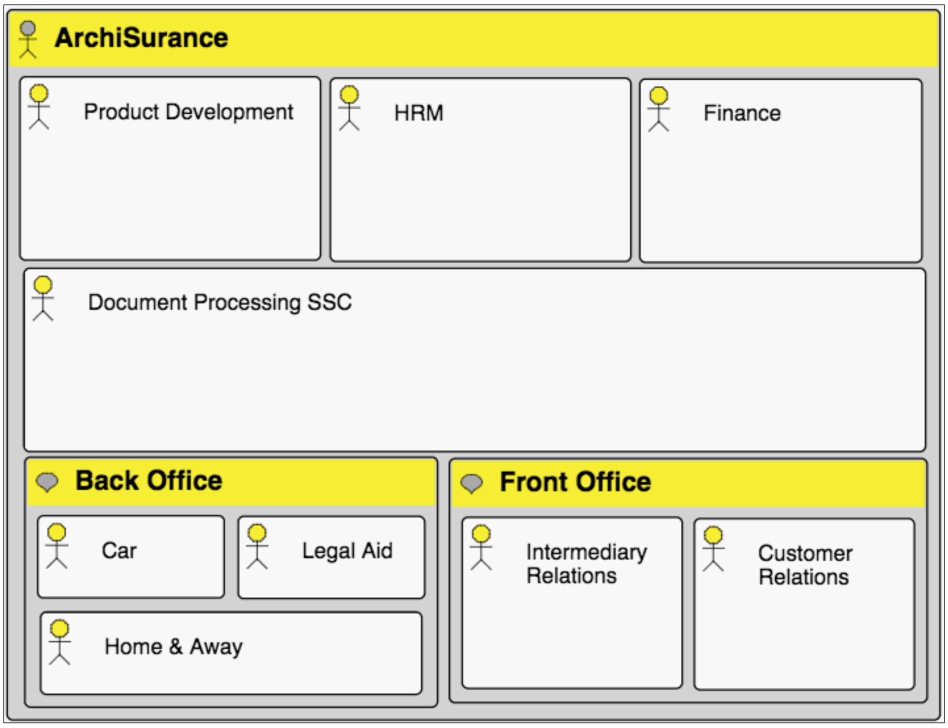
Organization Viewpoint

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.



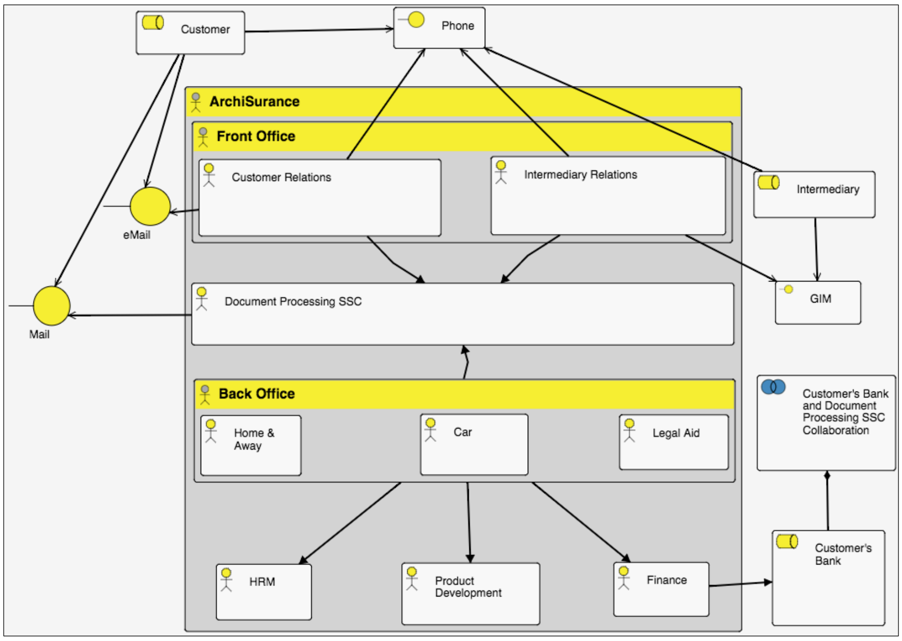
Actor Co-operation Viewpoint

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

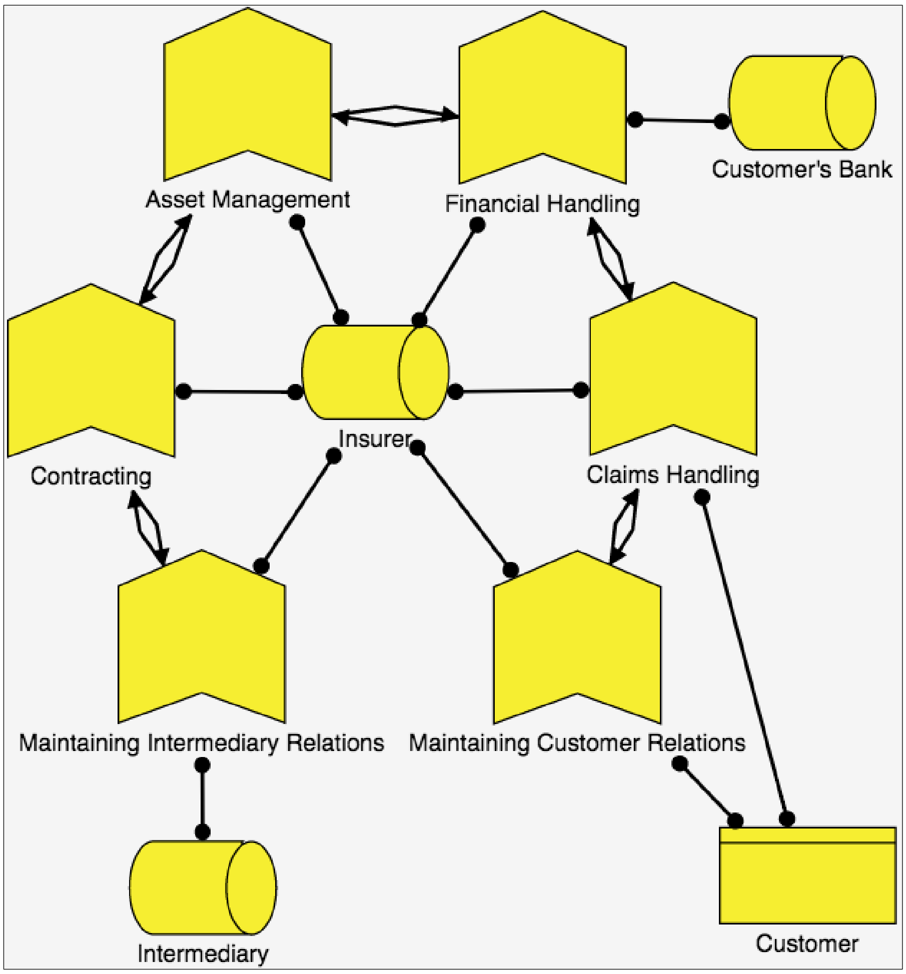
The Business Function viewpoint shows the main business functions of an organization and their relationships in terms of the flows of information, value, or goods between them.

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.

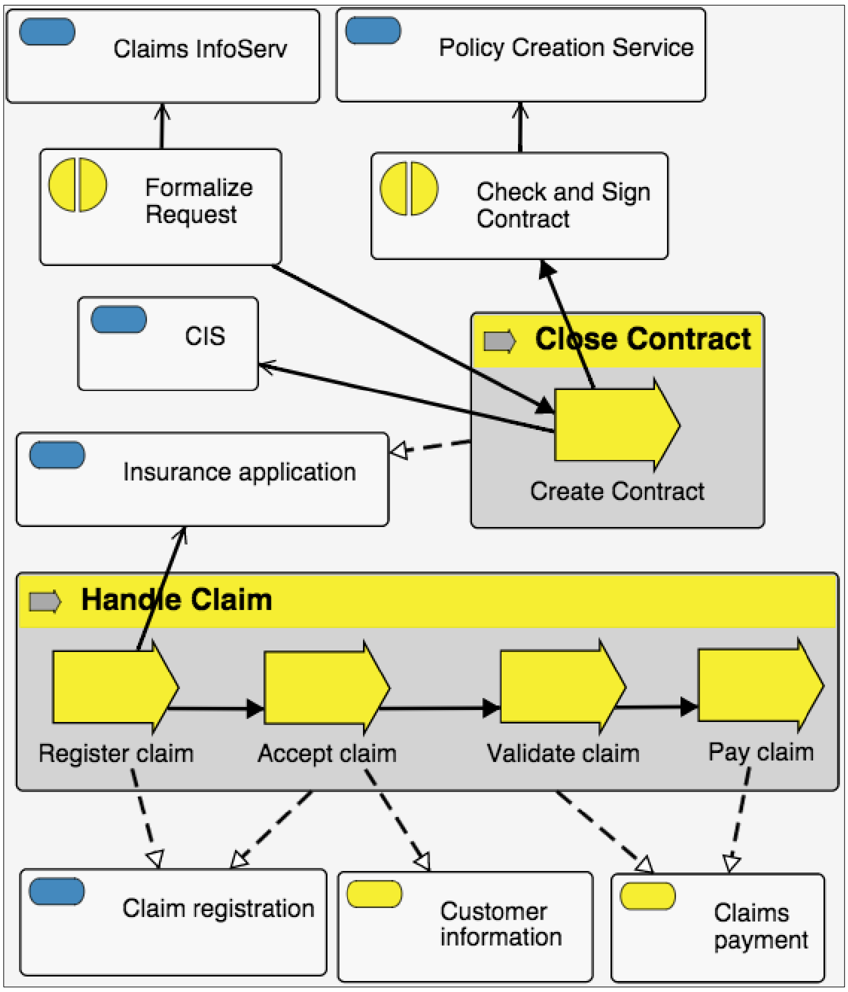


Business Process Co-operation Viewpoint

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.



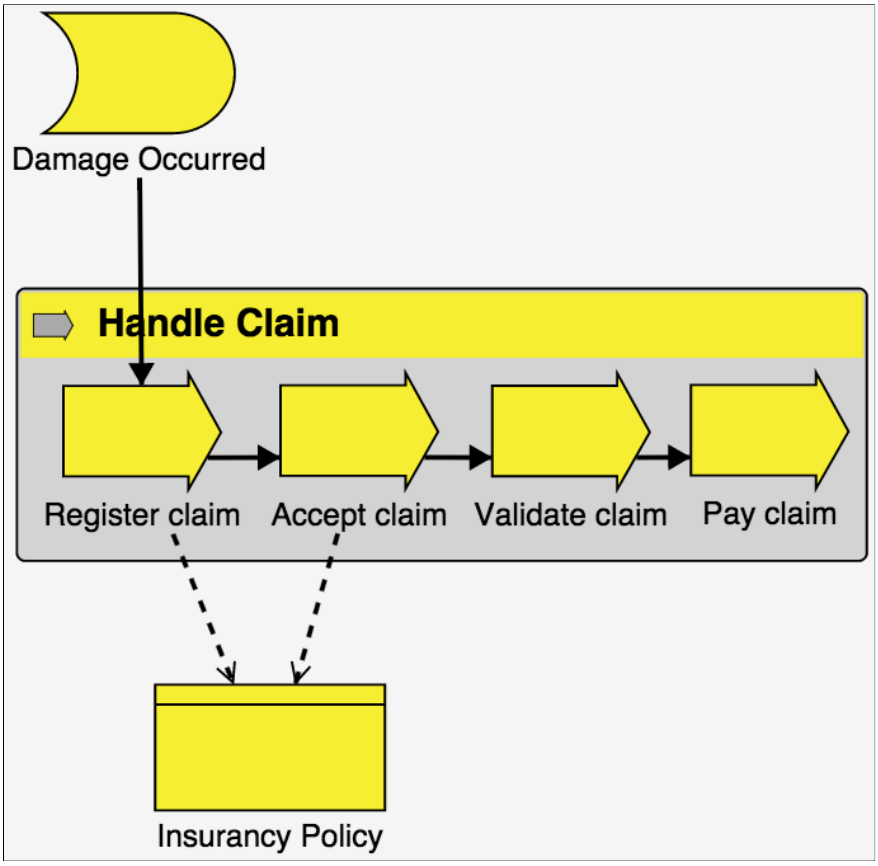
Business Process Viewpoint

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.



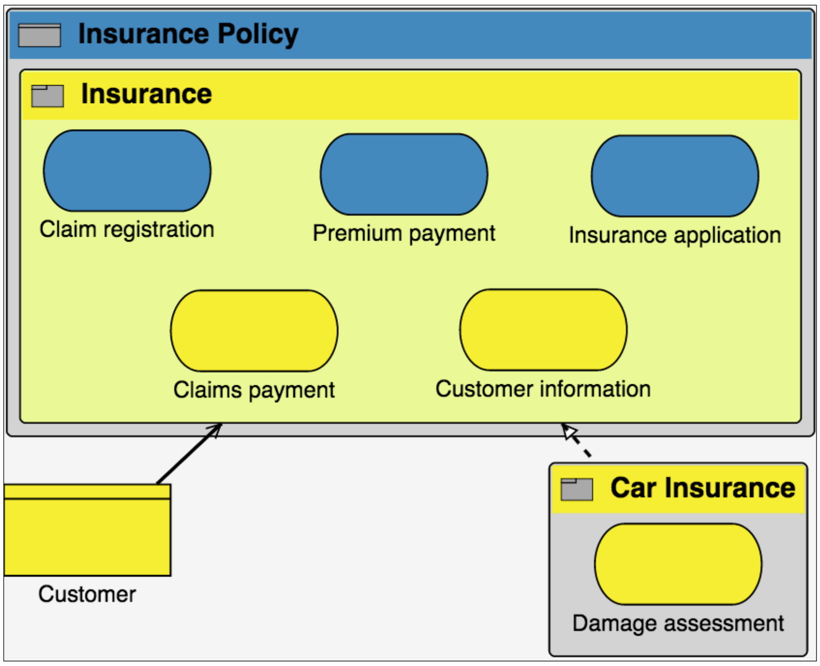
Product Viewpoint

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.



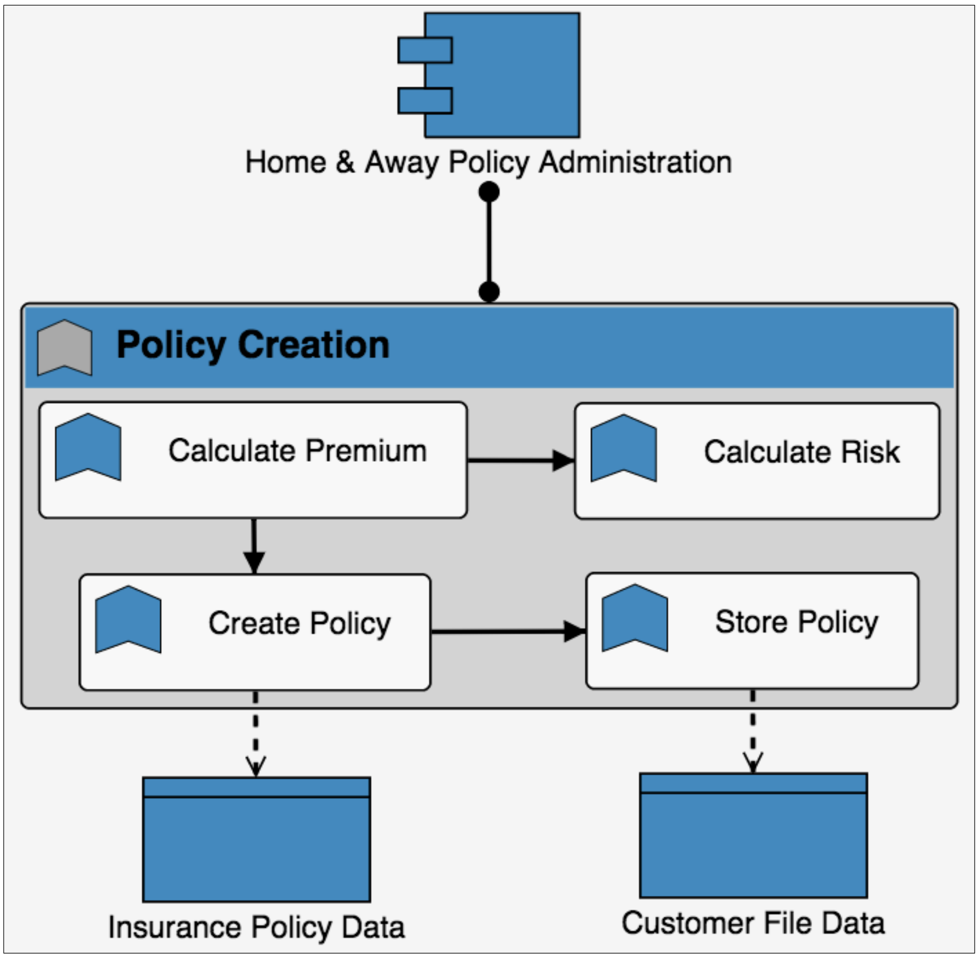
Application Behaviour Viewpoint

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.



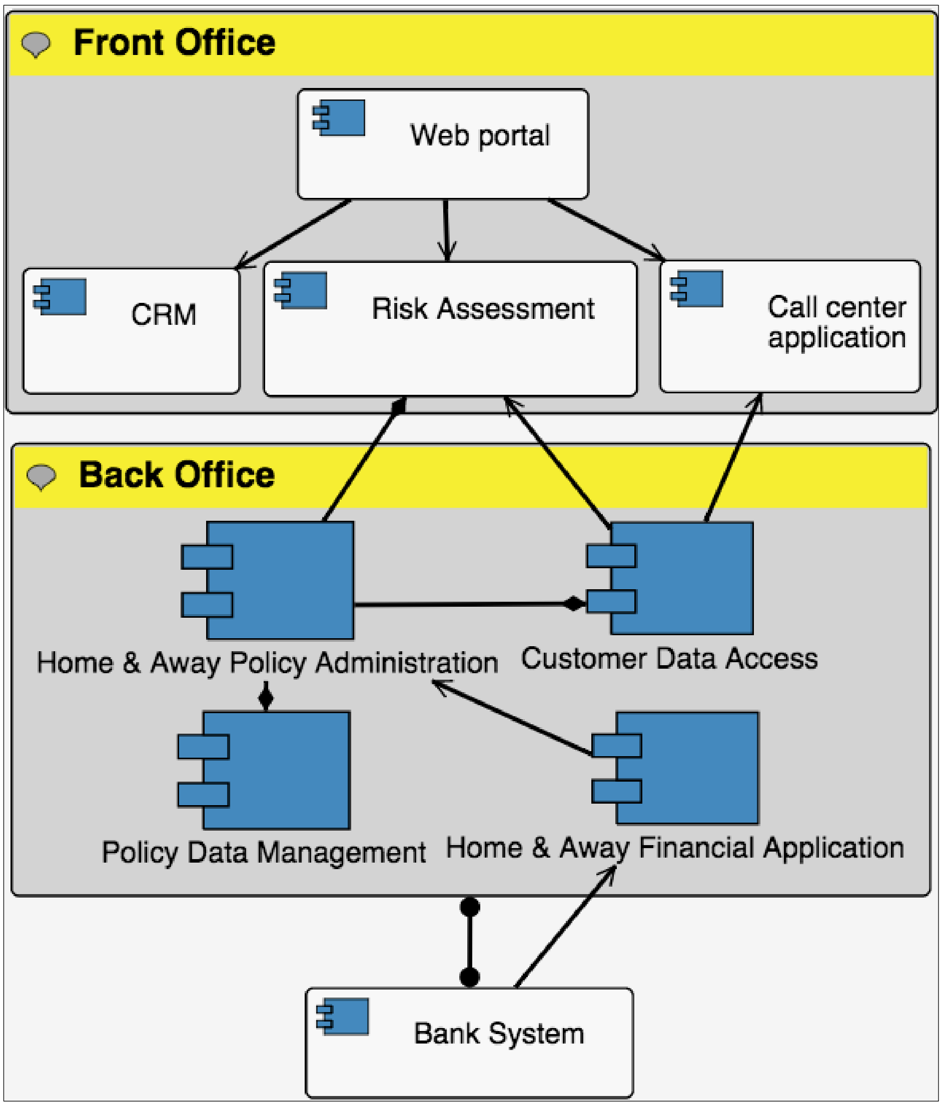
Application Co-operation Viewpoint

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.



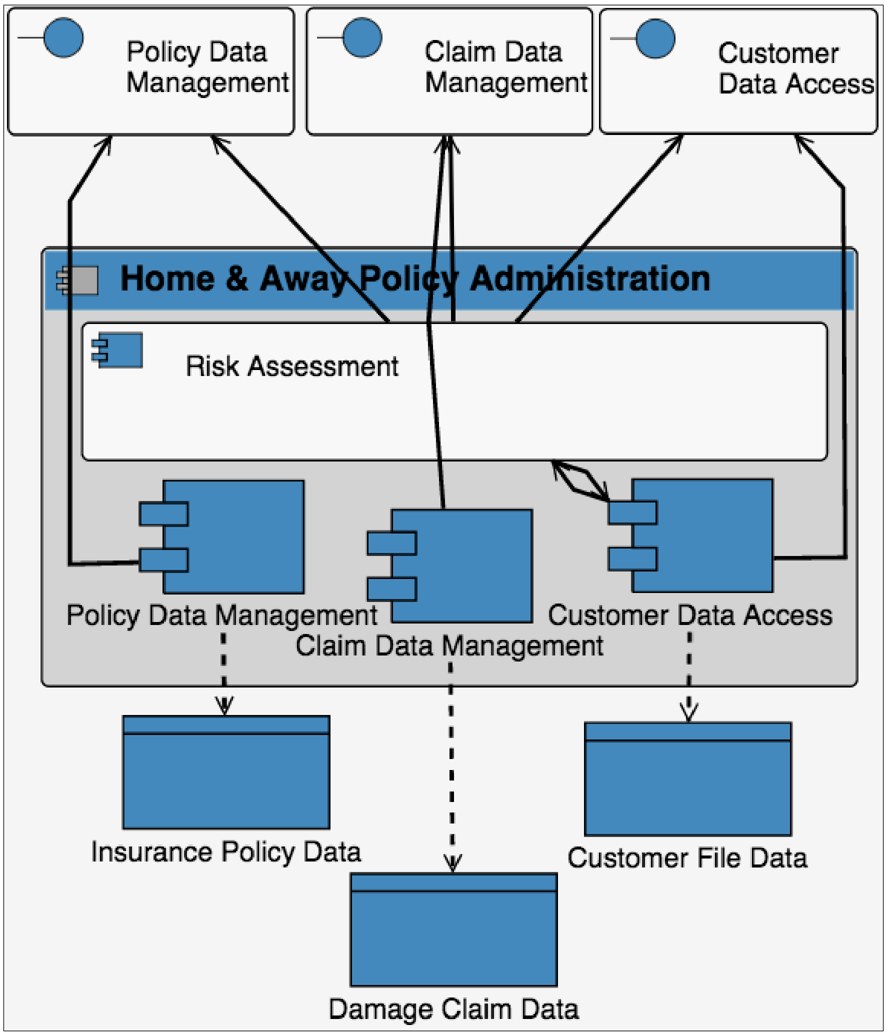
Application Structure Viewpoint

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.



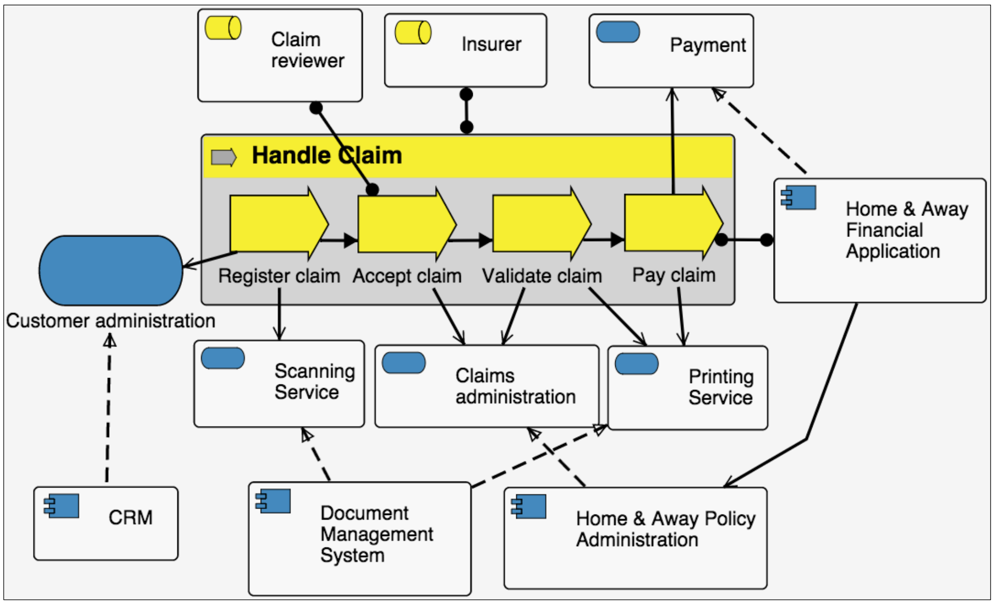
Application Usage Viewpoint

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.



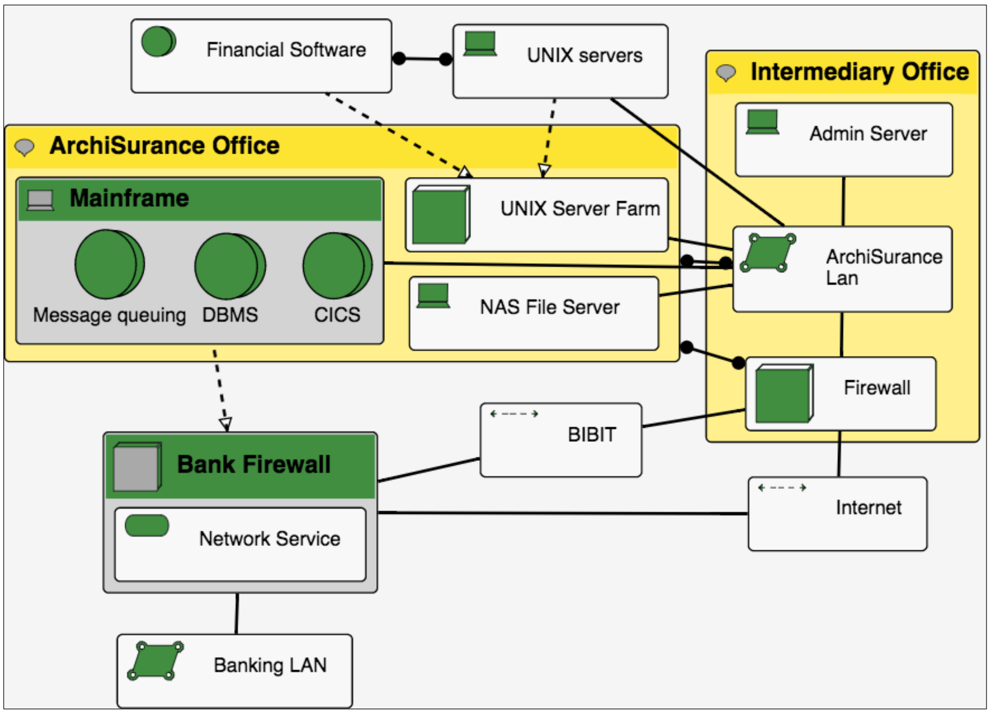
Infrastructure Viewpoint

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



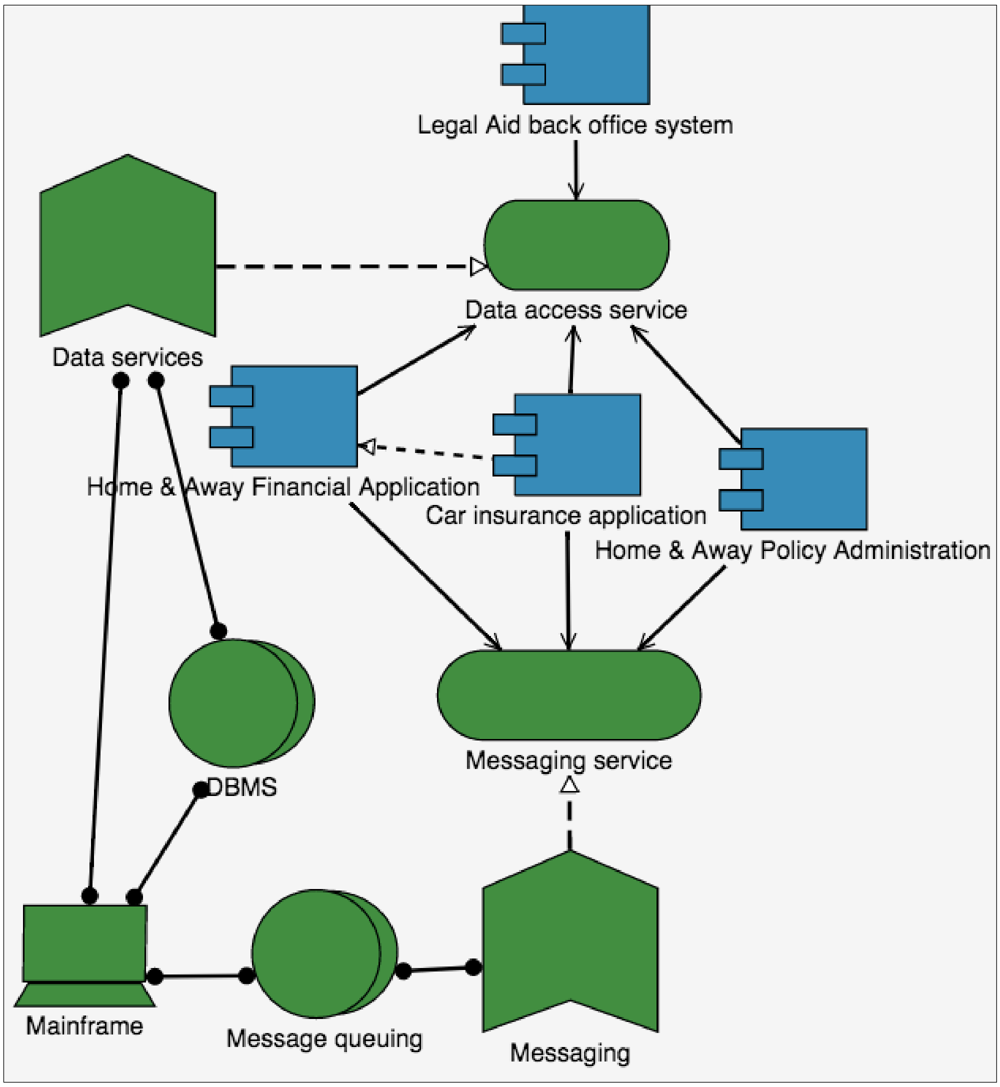
Infrastructure Usage Viewpoint

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.



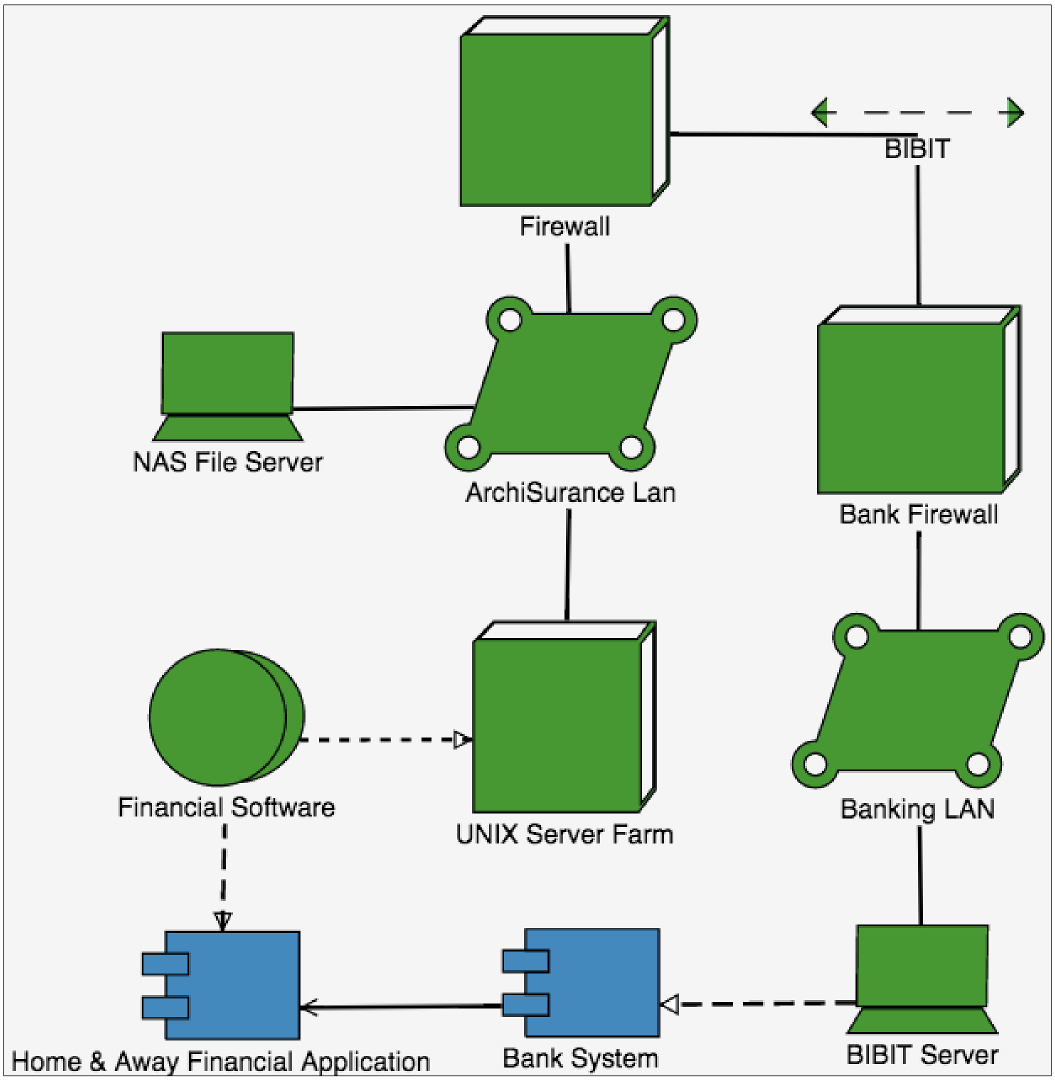
Implementation and Deployment Viewpoint

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.



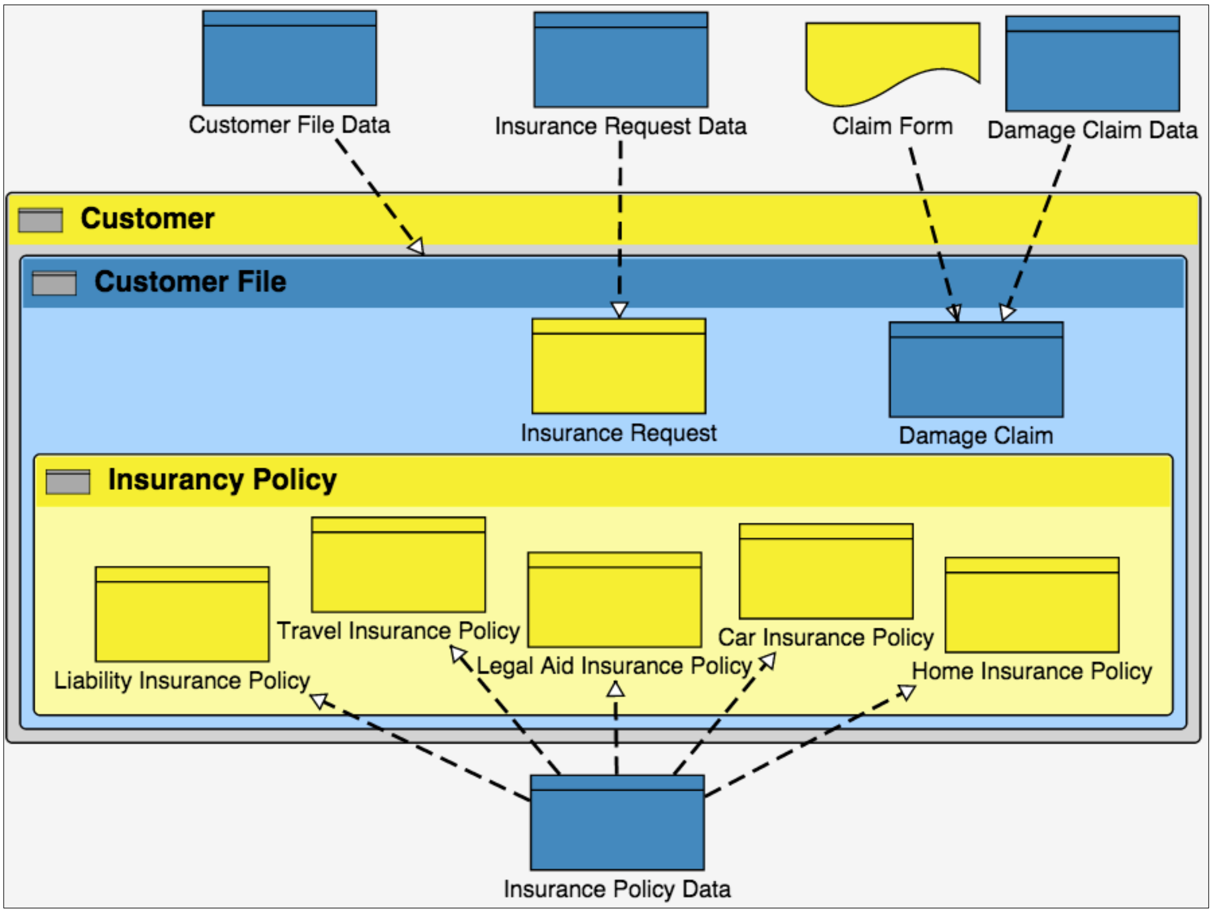
Information Structure Viewpoint

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.



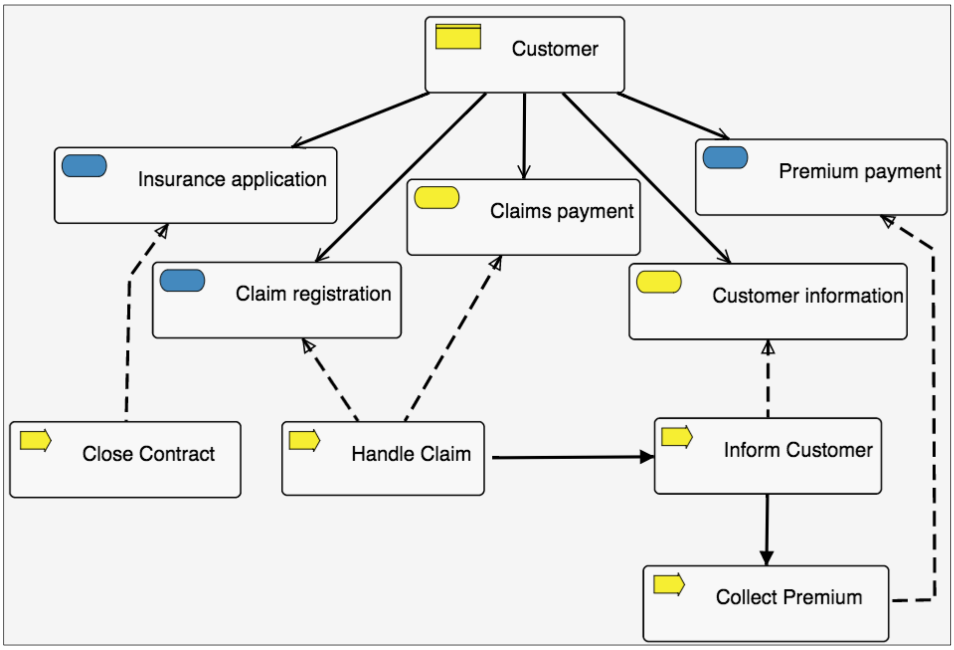
Service Realization Viewpoint

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

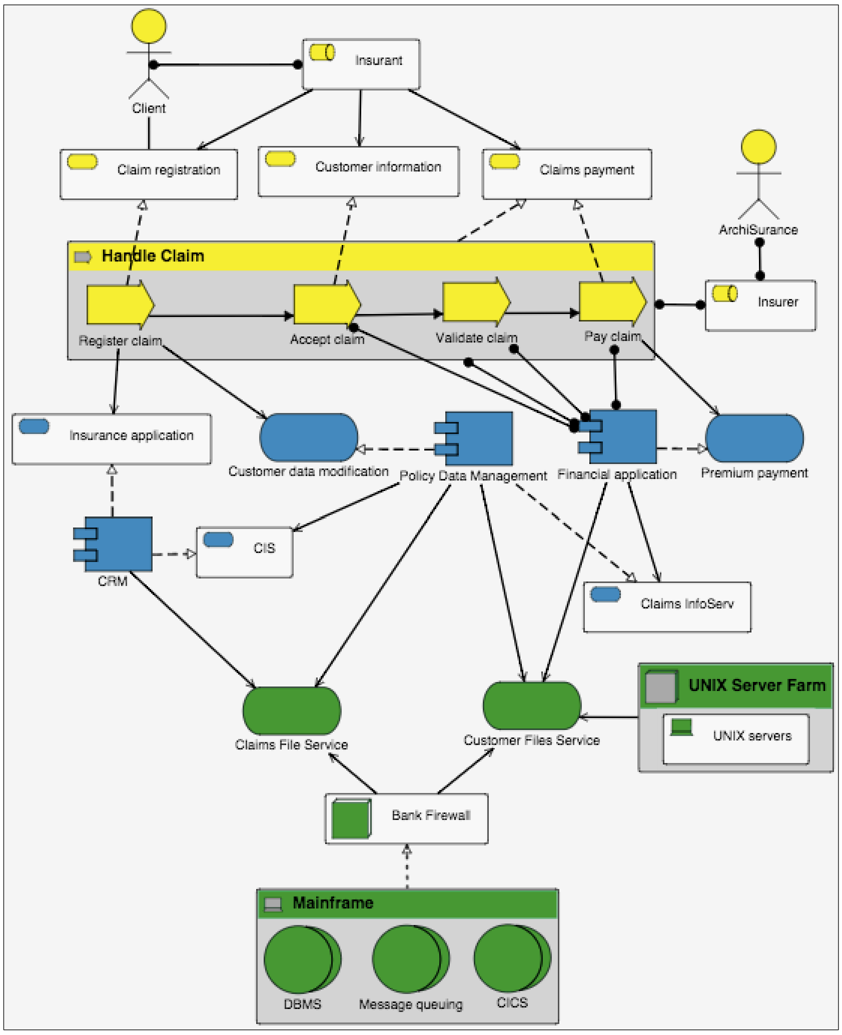


Layered Viewpoint

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.



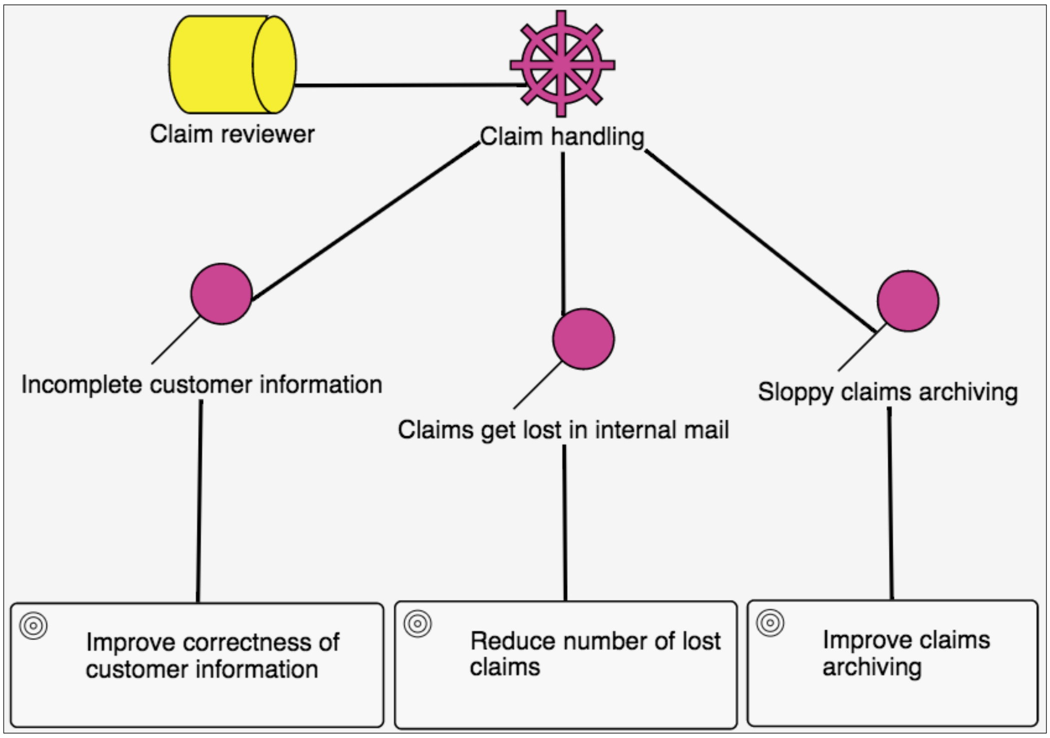
Stakeholder Viewpoint

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

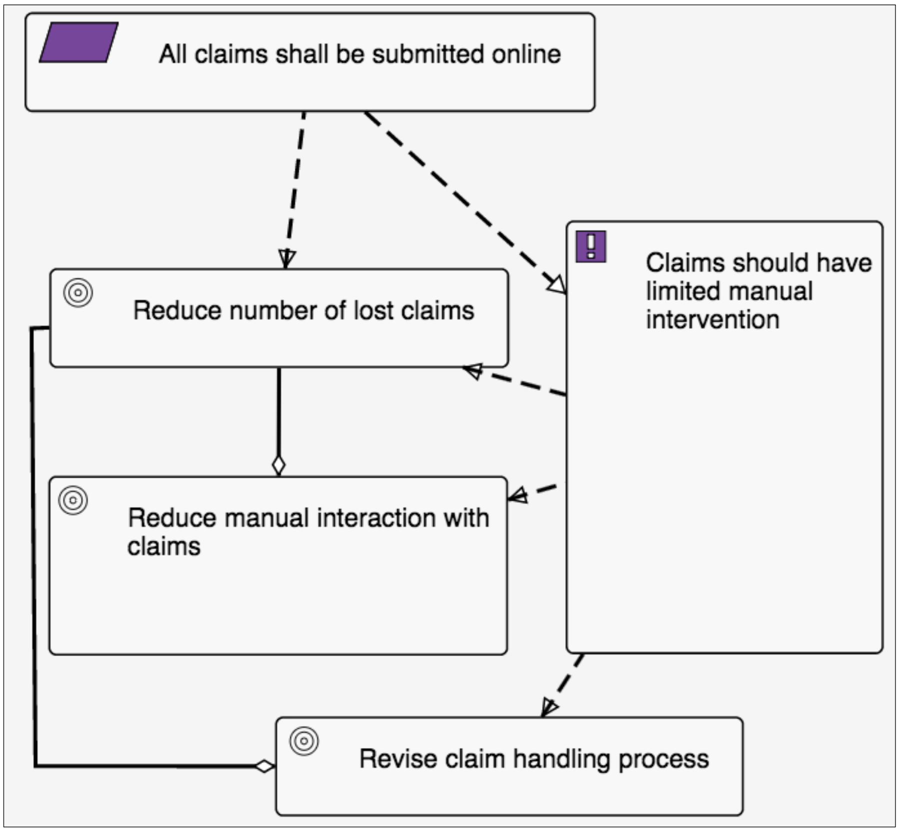
The Goal Realization viewpoint focuses on refining the initial, high-level goals into more concrete (sub-) goals using the aggregation relationship, and finally into requirements and constraints using the realization relationship.

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.



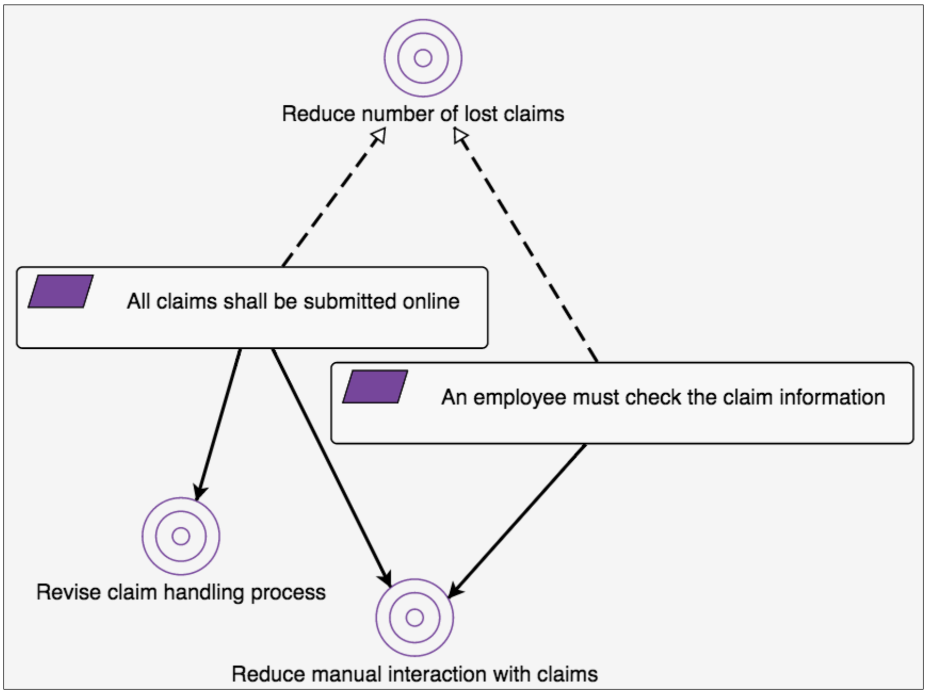
Goal Contribution Viewpoint

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:

Goal, Requirement, Principle and Constraint.



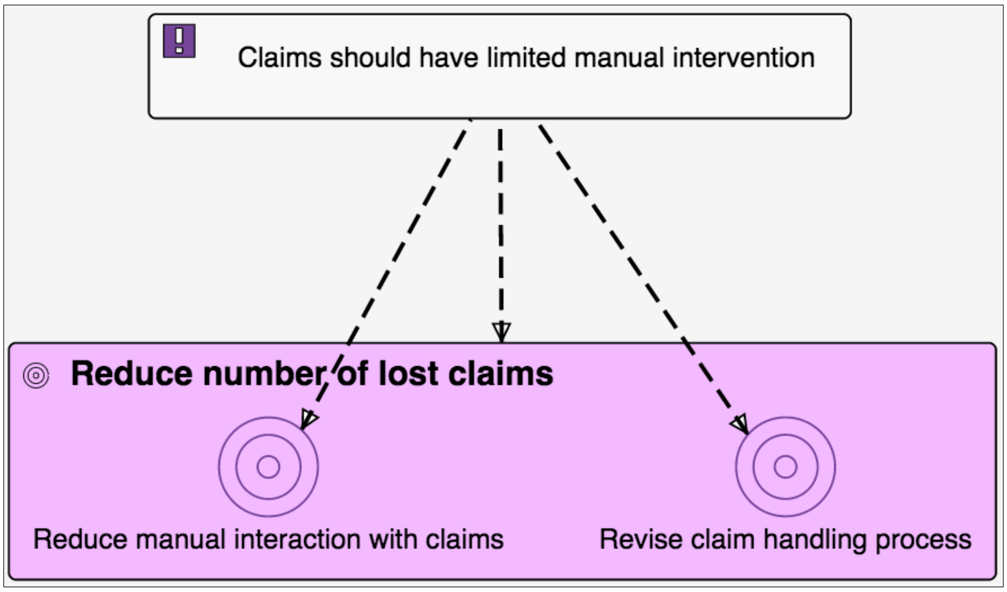
Principles Viewpoint

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.



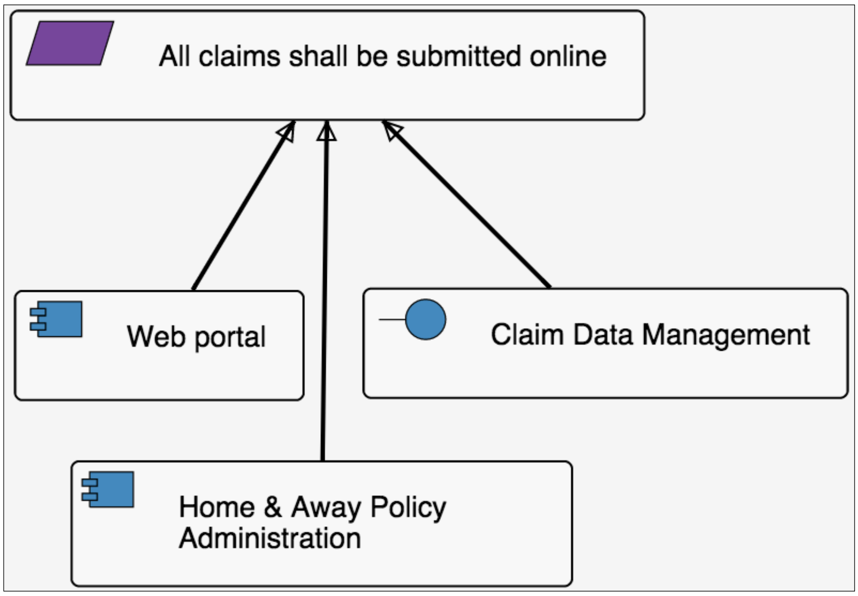
Requirements Realization Viewpoint

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

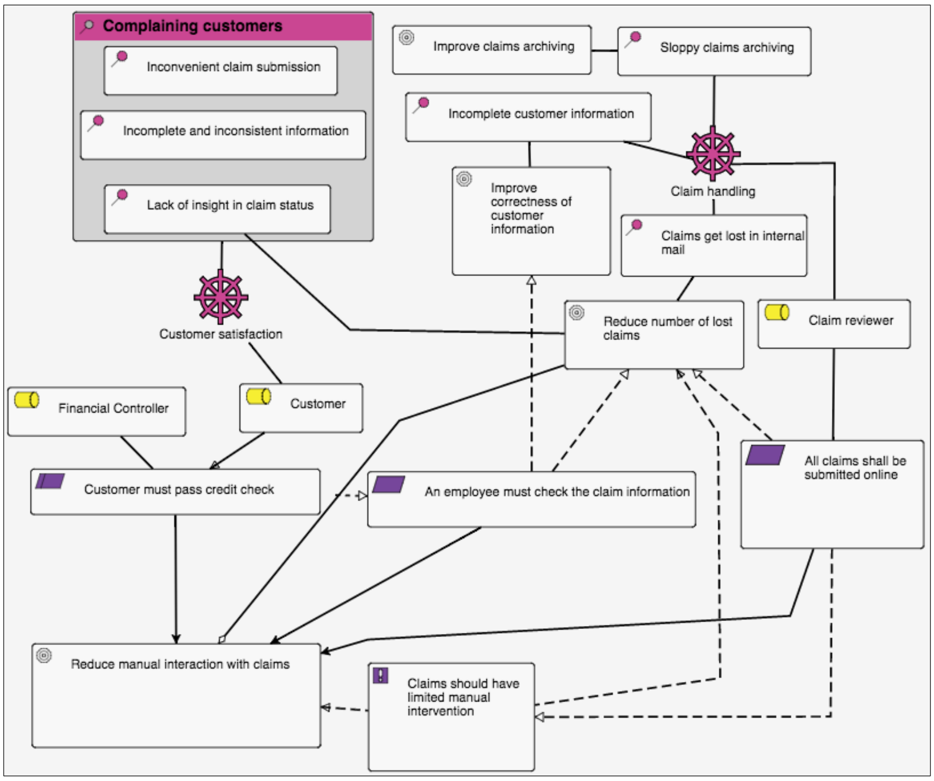
The Motivation viewpoint covers the entire motivational aspect, and allows one to use all motivational elements.

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.



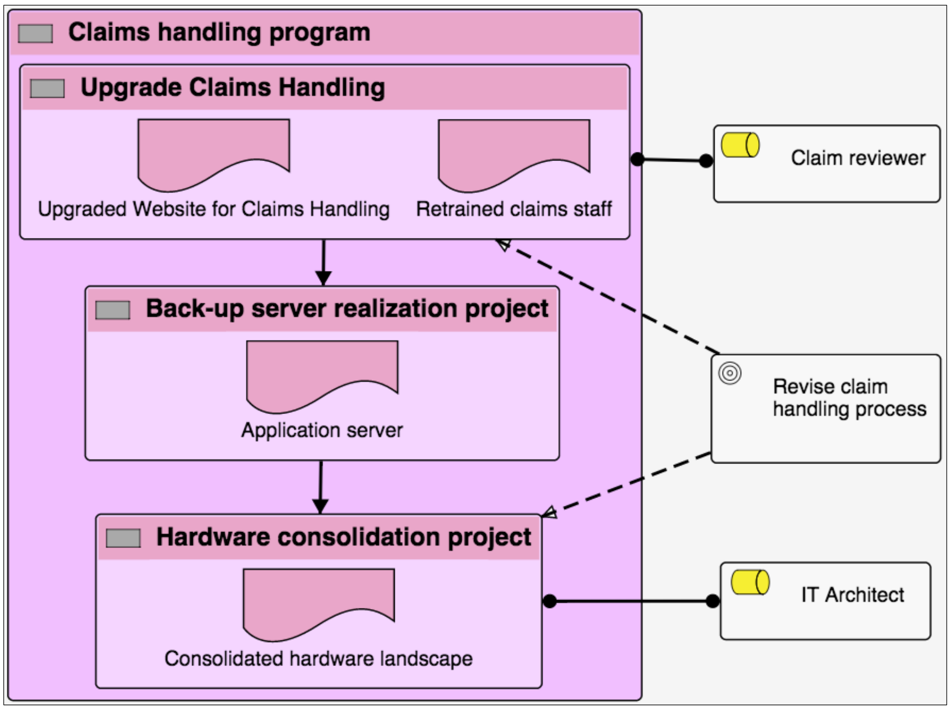
Project Viewpoint

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

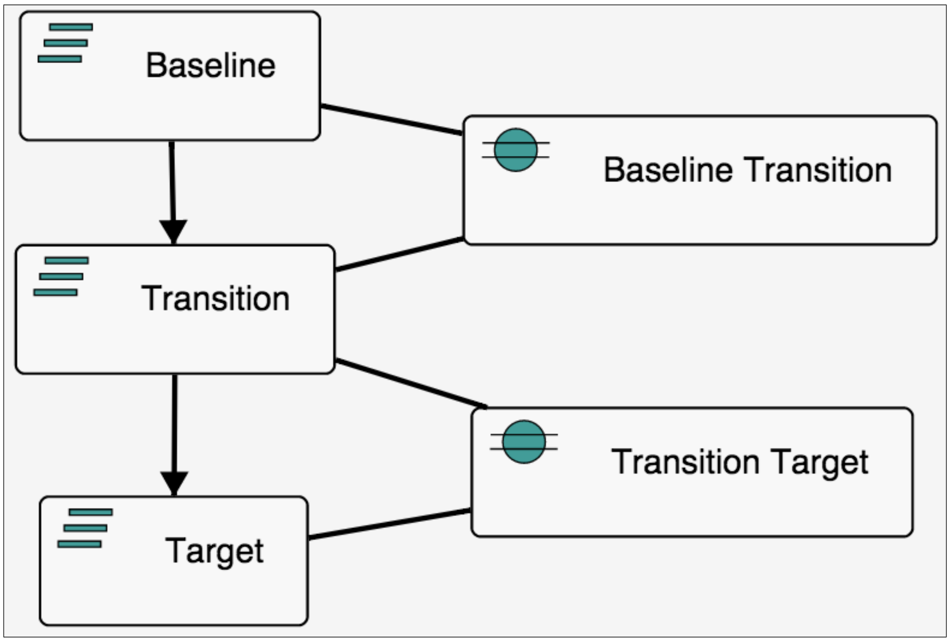
The Migration viewpoint is used to model the transition from an existing architecture to a target architecture.

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

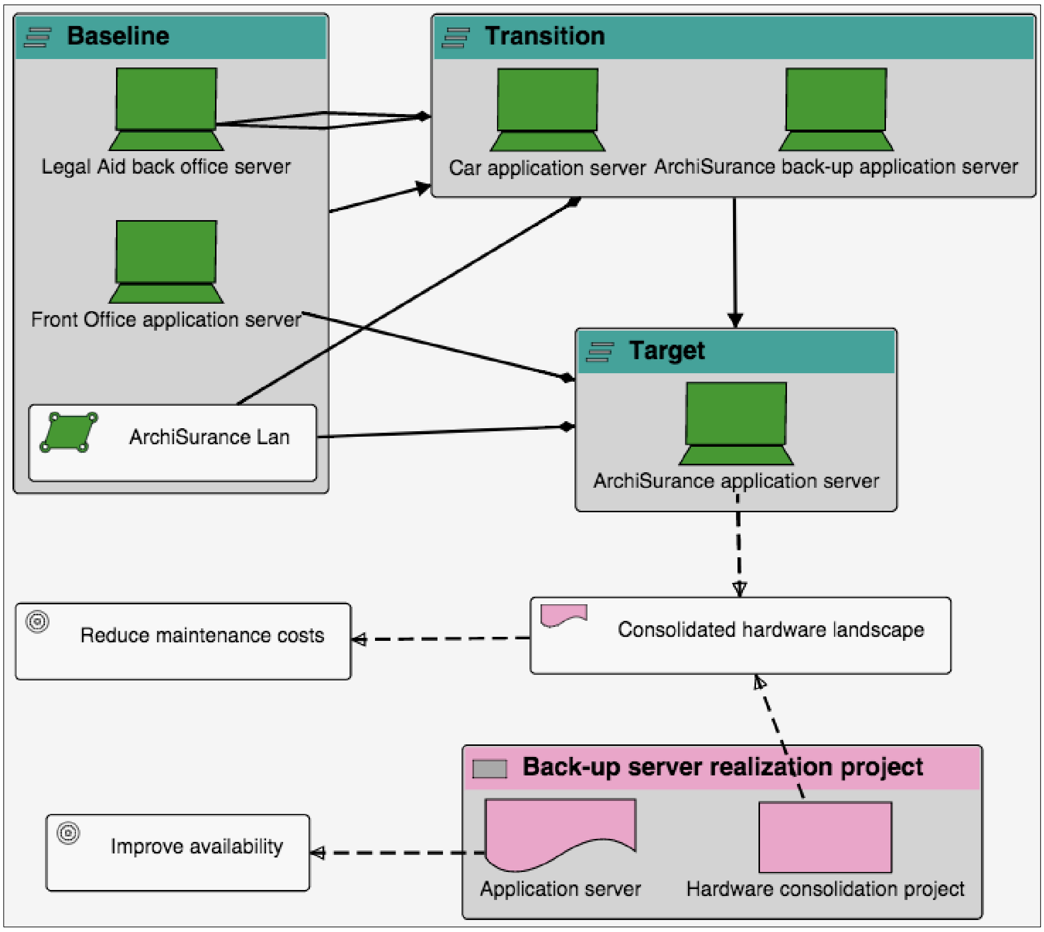
The Implementation and Migration viewpoint is used to relate programs and projects to the parts of the architecture that they implement.

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.

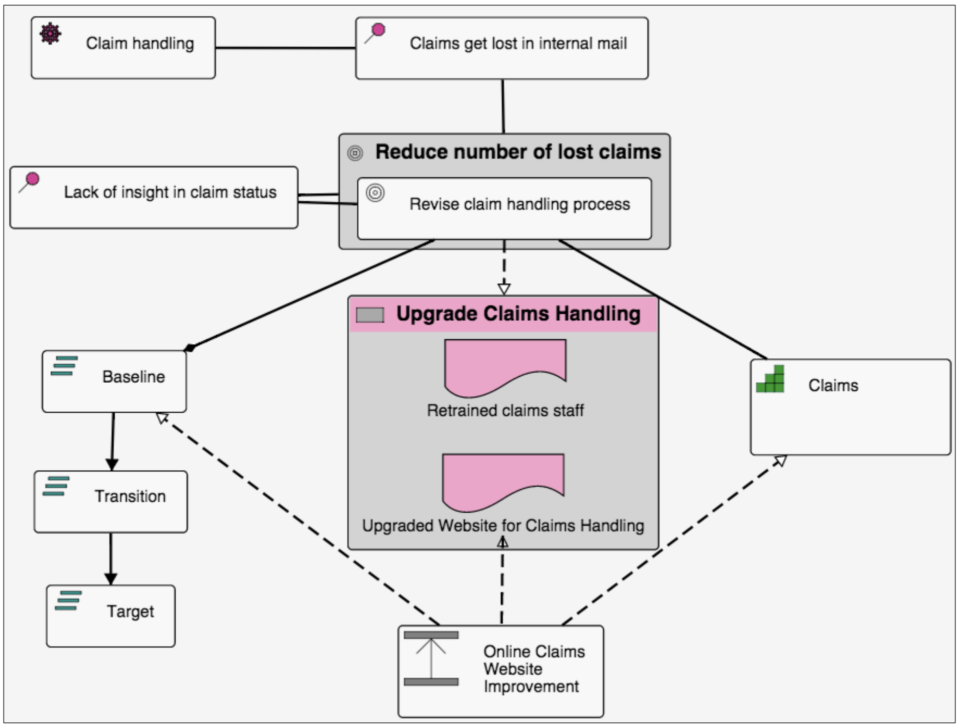
Business Capability Increment Viewpoint

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

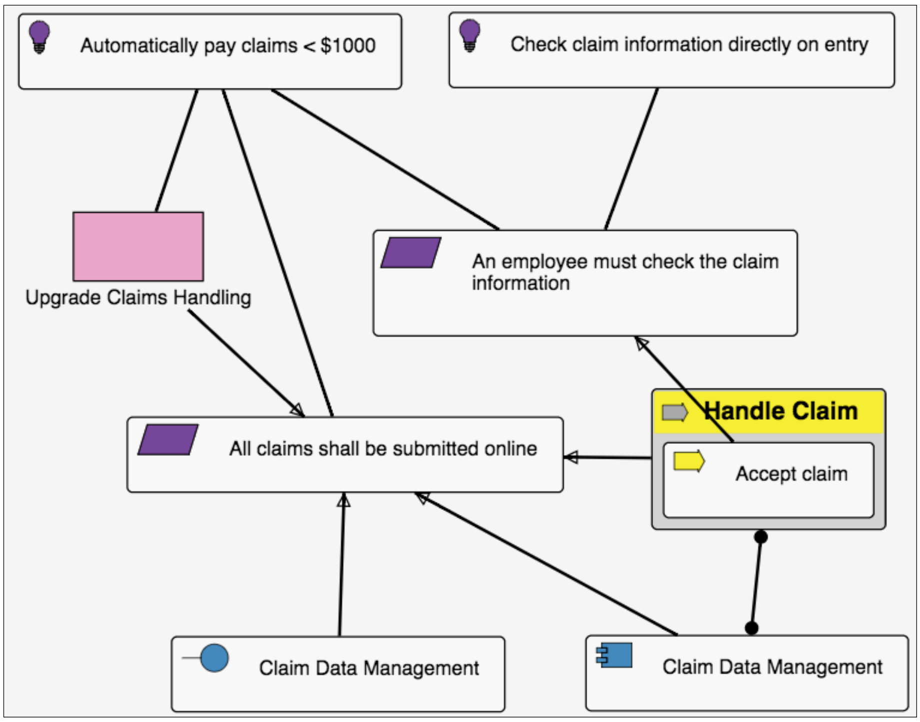
The Idea to Delivery viewpoint is used to show how an idea is realised through to implementation.

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.

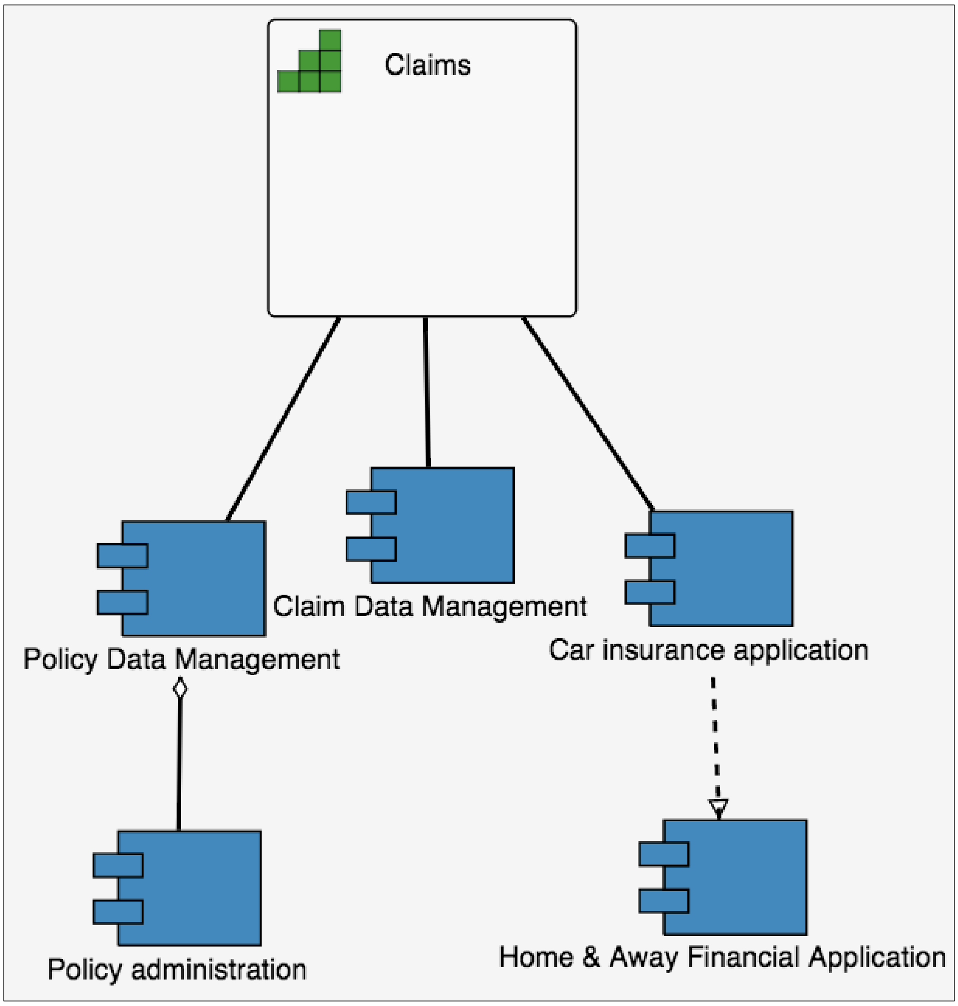


Capability to Application Component Viewpoint

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.

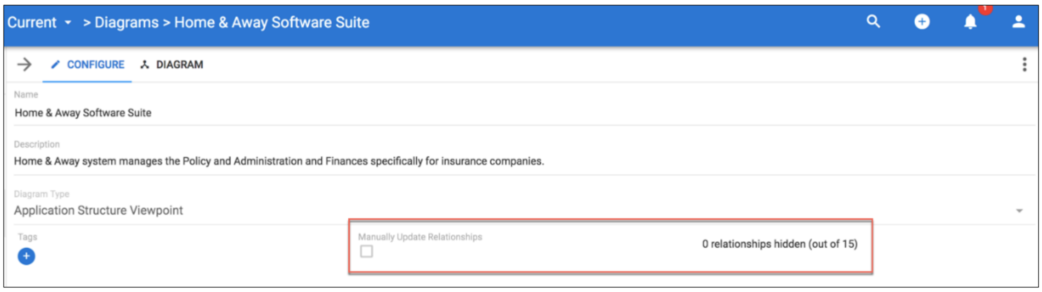


Relationship Manual Edit Mode

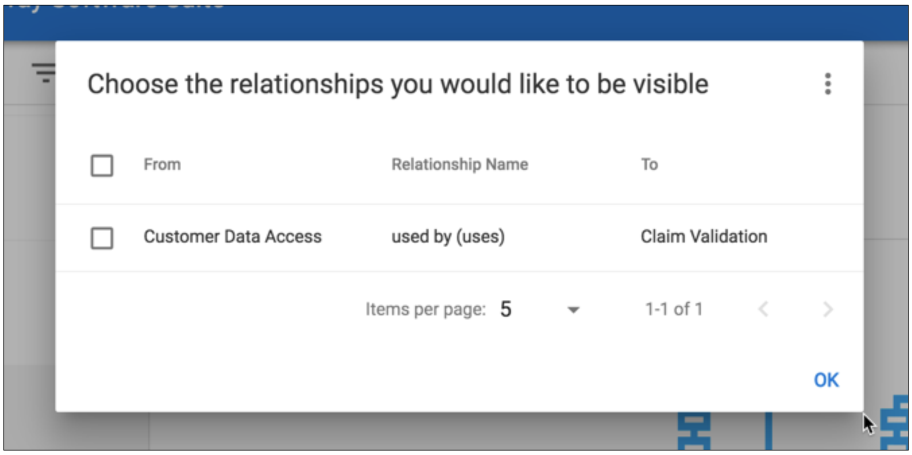
Provides a mode that a diagram can be placed into to 'hide' the representational consistency of our tool within chosen diagrams. This will allow users to build diagrams that they may consider 'snapshotted' or 'finished', that they do not want to then be updated with relationships between model objects,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



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



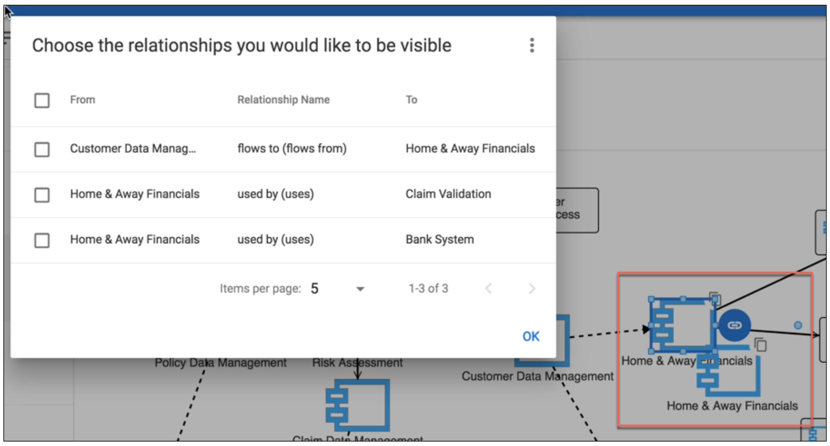
The user can either choose to

- 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 diagramand 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.



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

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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