

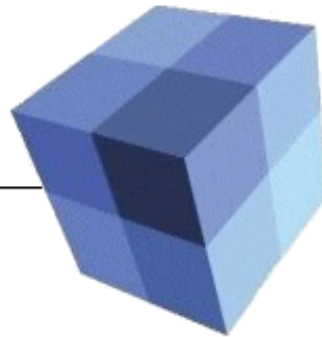
Version

4.0

ENTERPRISE ELEMENTS

**Elements
Repository**

Version 4



USER'S GUIDE

ENTERPRISE ELEMENTS

User's Guide

© Enterprise Elements, Inc
11654 Plaza America Drive • Suite 639
Reston, VA 20190-3179

Table of Contents

Overview

The Elements Repository is a powerful data management system based on Oracle.

Login

The Elements Repository system is accessed via URL within a standard Web Browser. The default URL has the following structure: <http://<host>:<port>/ee>, where <host> is the name or IP address of the server where the web services are installed, and <port> is the port on that server that was set during installation. This is different for each installation, so you must check with your System Administrator to get the Elements URL at your site.

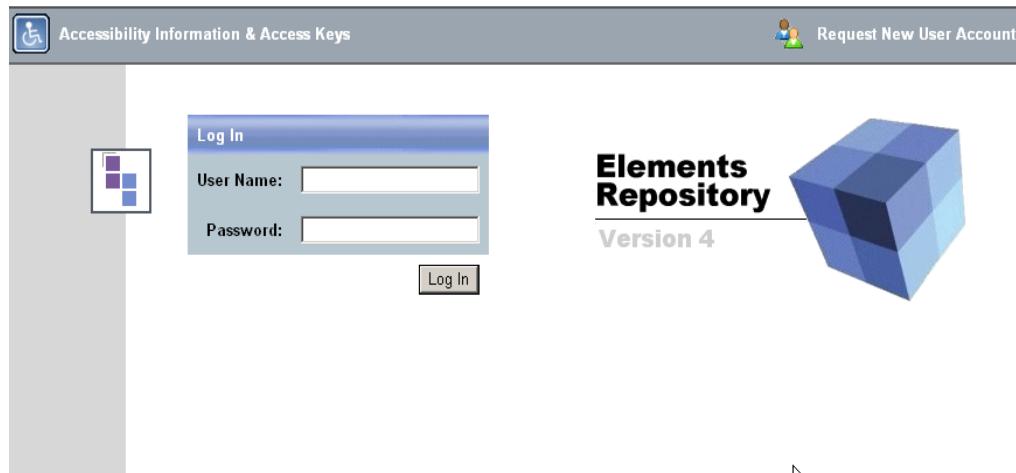



Figure 1 – the standard Login Page

You must have a valid user name and password to be allowed access to the Elements Repository system.

If you do not have a user name and password, you can request one from your System Administrator or use the “Request User Account” feature built in to your Elements Repository.

Request a User Account

The “Request User Account” feature will allow an individual to enter their name, email address and desired password. When an Elements Repository Administrator approves the request, an email will be automatically sent to the individual notifying them that the account is available for use.



Request a New User Account

To request a new Repository user account, fill in, and submit the following form. Your administrator will notify you by email when your account is active.

*The * indicates a required field.*

Helpful Hints

Make sure to use a valid email address. This will allow you to be notified when your account is activated.

Your database User Name will be the name you use when you log in to the system. It must start with a letter (not a number) and it can not contain any spaces.

Special Notes on Passwords

Password security is your responsibility. The following information is

* First Name	<input type="text"/>
Middle Initial	<input type="text"/>
* Last Name	<input type="text"/>
* Email Address	<input type="text"/>
* Desired Database User Name	<input type="text"/>
* Password	<input type="password"/>
* Re-enter Password	<input type="password"/>

Request Account

Figure 2 – Request New User Account input screen

Basic Concepts

Elements

The Elements Repository name for an individual record of information is an “Element”. Each Element represents a chunk of fundamental data within or referenced from within your enterprise. Your Elements Repository will collect, manage, and help you analyze and organize many such individual Elements.

The Elements in your enterprise will be logically grouped together. The first type of grouping will be based on the similarity of the data that is being stored with each Element. Additional information about each Element is known as an *Attribute* of that Element. Attributes contain special data such as Text, Dates, Pick Lists, and others that help define each individual Element. Elements with the same set of attributes are grouped into what are called *Classes*.

Groupings other than Classes exist, and are managed through *Filters*, which can include subsets of Elements from one or more Classes depending on specified grouping rules.

Classes

Overview

The Elements Repository allows the configuration of information types that can be managed using the Elements features and user interface. These information types are somewhat like database tables, but have additional features and can be specified with an Elements administrative tool. Within the Elements Repository product, these information types are called “Classes.” A Class can have a name, a color, an icon, a number of attributes, relationships to other Classes, change management processes, and security settings. Many default reports and data input screens are generated by your Elements Repository and are largely based on the configuration of these Classes

Special Class types

A “Link Class” is an Elements Class that has exactly two SQL Pick List Attributes defined. It has the role of maintaining many-to-many relations between two other Classes.

Filters

A Filter is a (SQL) query that is saved in the database with some additional parameters. Each filter provides a dynamic subset of the Elements in the Repository that match its particular subset rules. Filters appear in most parts of the Elements Repository and serve many functions. A Filter launched within the Web browser will usually generate an HTML report containing the results of the saved query. In other parts of Elements, a Filter may be used to simply return a simple list of Elements, for editing or selecting for some use.

A number of Filters are pre-installed before any additional configuration has taken place, but a great deal more are auto-generated as the Elements Repository is configured.

New Filters can be created by a power user either through wizards or direct SQL query to the underlying database that runs your Repository..

Filter Types

There are four main filter types that may appear or behave differently from one another, depending on where they are viewed.

Listing Filters



Listing Filters will return a list of items, with optional additional information about each of those items. The items may be Elements, Classes, Filters themselves, or in fact any data available to the repository, including data from other databases entirely.

The behavior of the items returned by each filter is determined by controlling information associated with the filter definition. This controlling information is called *Metadata*, and can be defined and managed in the user interface.

The screenshot shows a dialog box titled "My Filters and Folders Properties" with a "SQL" tab selected. The left pane contains a SQL query, and the right pane shows a table with columns "Position", "Column Name", and "Column Group". Below the dialog, a table displays the results of the query.

```
Select nt.LABEL,
td.display_name "Edited By",
nt.Type_id,
nt.text_id
From NAMED_TEXT nt,
EE_USER u,
TYPE_DEFINITION td,
PARAMETER p
Where td.type_id = nt.type_id
And P.ID = nt.Text_id
And P.PARAMETER= 'OWNER'
And P.type_id = 82
And P.VALUE = SYS_CONTEXT('ELEMENTS_CTX','USER_ID')
And u.db_name_id(4) = nt.edited_by
And nt.Type_id in (20,21,22,23,28)
Order By 3, UPPER(LABEL)
```

Position	Column Name	Column Group
1	NAMED_TEXT.LABEL	0
4	NAMED_TEXT.TYPE_ID	0
5	NAMED_TEXT.TEXT_ID	0

Edited By	LABEL	Type	TEXT_ID	TYPE_ID
System	ACTIVE_COMMENTS and related COMMENT_CODES Elements	Detail SQL	4776	20
System	ACTIVE_COMMENTS COMMENT DATE Metrics (Date)	Detail SQL	4426	20
System	ACTIVE_COMMENTS Elements (All)	Detail SQL	4249	20
System	ACTIVE_COMMENTS LAST MOD DATE Metrics (Date)	Detail SQL	4427	20
System	ACTIVE_COMMENTS NCMO Metrics (Number)	Detail SQL	4422	20
System	ACTIVE_COMMENTS SEQUENCE Metrics (Number)	Detail SQL	4424	20
System	ACTIVE_COMMENTS LPO DATE Metrics (Date)	Detail SQL	4428	20
System	ACTIVE_COMMENTS USER ID Metrics (Number)	Detail SQL	4429	20
System	ACTIVE_COMMENTS Volatility	Detail SQL	4250	20
System	ACTIVE_CORRES and related MEMOCODE Elements	Detail SQL	4770	20
System	ACTIVE_CORRES BRANCH DATE Metrics (Date)	Detail SQL	4390	20
System	ACTIVE_CORRES DIV DATE Metrics (Date)	Detail SQL	4391	20
System	ACTIVE_CORRES DUE DATE Metrics (Date)	Detail SQL	4394	20
System	ACTIVE_CORRES Elements (All)	Detail SQL	4243	20
System	ACTIVE_CORRES LAST MOD DATE Metrics (Date)	Detail SQL	4397	20
System	ACTIVE_CORRES LEGAL DATE Metrics (Date)	Detail SQL	4392	20
System	ACTIVE_CORRES NCMO Metrics (Number)	Detail SQL	4387	20

Figure 3 - Filter Properties

FILTER METADATA

“Filter Metadata” is additional information associated with each Filter that helps the Elements user interface display or utilize Filter results in specialized ways.

Filter Metadata takes the form of a series of labels that correspond to some or all of the columns in a Filter result set and position information that specifies the column to which each metadata label corresponds.

These labels are:

- ELEMENT.ELEMENT_ID
- ELEMENT.DESCRPTION
- CLASS.CLASS_ID
- SYMBOL.SYMBOL_ID
- STATUS.STATUS_ID

A Filter will return results within the Filter Editor if no metadata is defined, and will generally provide more functionality elsewhere within the Elements user interface when more are defined.

The ELEMENT.ELEMENT_ID metadata label should always be defined and should correspond to the column that contains the ELEMENT_ID.

The ELEMENT.DESCRPTION should always be defined and correspond to the column that will act as the primary label of the element in the user interface. Values in the column labeled with ELEMENT.DESCRPTION will be automatically hyperlinked to the Detail Report for the Element. Many Classes will have a “Name” attribute, and if so, it is common to use this as the ELEMENT.DESCRPTION column. If a custom Label has been defined in the Class Editor for the Class, then the DESCRIPTION column of the ELEMENT table is also a common choice.

CLASS.CLASS_ID should always be defined and correspond to the CLASS_ID of the Element. This is available in the ELEMENT table and the CLASS table and either may be chosen, depending on the nature of the query.

SYMBOL.SYMBOL_ID is optional and will cause the display of an icon identified by the SYMBOL_ID in the SYMBOL table within the HTML view. This is the key mechanism for creating “scorecard”-style reports.

Summary Filters



Summary Filters are grouping queries that can be displayed as pie charts, bar charts, radar charts or rose charts. A summary filter returns a specific set of columns in a specific order. These columns can then be rendered into one of the chart types. The Filter General Properties allows you to control the name of the filter, type of chart, and some other display properties.

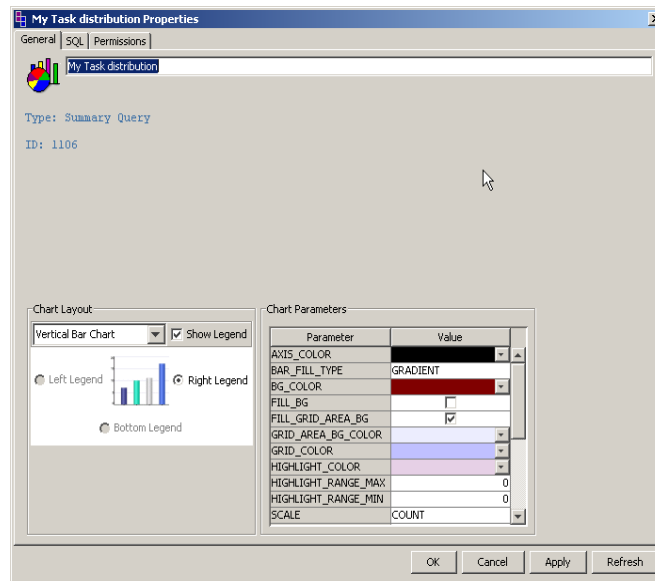


Figure 4 - Summary Filter General Properties

Some examples of this type of data in various display modes are given below.

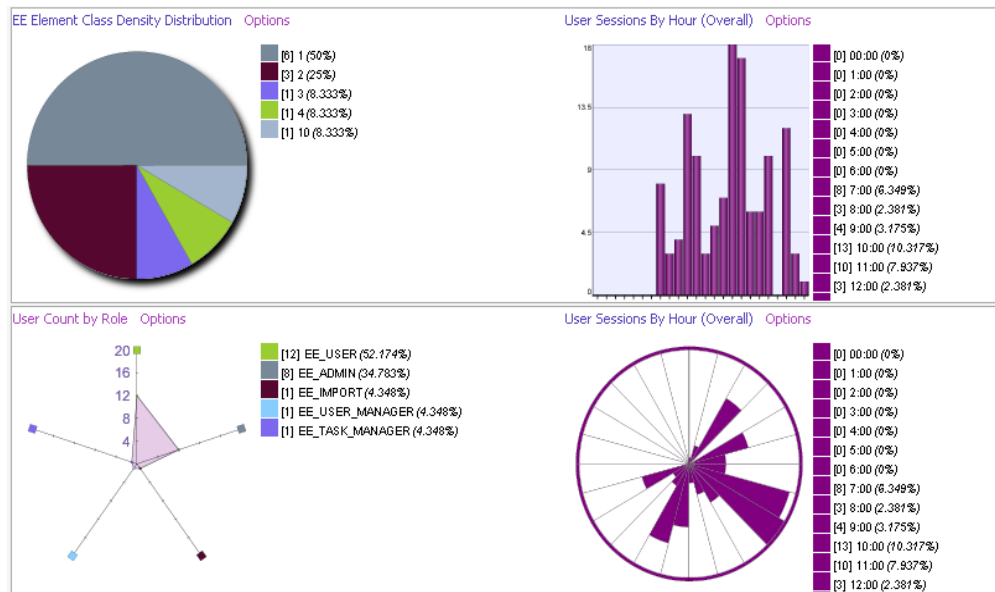


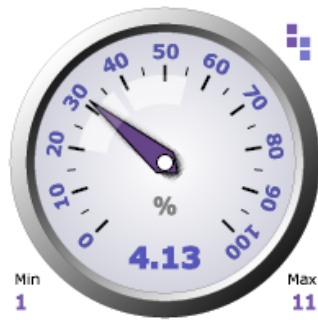
Figure 5 - Examples of rendered Summary Filters

Metric Filters

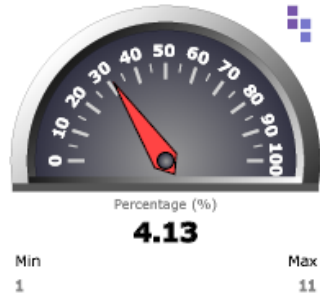


Metric Filters are specialized queries that return a single row of data in a specific format. This row can be displayed via a set of Gauges or meters, several of which are supplied with your system by default.

Attributes per Class (Metric)



Attributes per Class (Metric)



Attributes per Class (Metric)

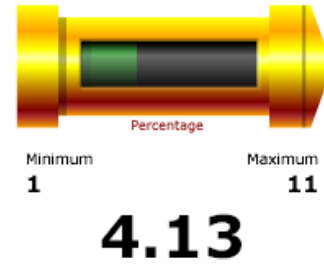


Figure 6 - Example Metric Filter Displays

Folders

General Folders

The Elements Repository is designed to manage very large amounts of information within potentially complex schemas. In order to manage this quantity and complexity, a Folder-style system was developed for grouping and organizing information.



A Folder in Elements is a container for Elements, for Filters and for other Folders.

Permissions can be assigned to Folders so that only certain users or roles can see them.

Folders and their contents can be viewed and edited within the Portal environment.

Complex Folder management can be accomplished within the eExplorer Application.

Dynamic Folders

Dynamic Folders are Filters, as they appear in the Elements Explorer. They behave similarly to normal Folders in that they can contain Elements, Folders and other Filters and in that they can graphically expand and contract. The Folder contents are not, however, specified manually and items shown upon expansion are exactly those returned by the defining Filter.



'My Favorites' Folder

The Elements system automatically creates a "My Favorites (<user_name>)" Folder for each user. Context-specific functions are available in various places within the Elements system that allow items to be placed in this folder. It otherwise functions as a normal Folder.



Recycle Bin

A special Folder that contains items staged for deletion. Items in the Recycle Bin are not visible through the standard user interface.



Items moved to the Recycle Bin can be recovered from within the Elements Explorer using the "Restore Item" function.

Processes

A Process in the Elements Repository can be applied to any Class and allows the definition of rules that control how Elements of that Class may be changed.

An Elements Process is defined as a State Machine containing States and Transitions.

Security rules can be applied to each State.

Rules can be defined that control under what circumstances a Transition can occur.

Triggers can be set on Transitions that bring about actions within the Elements Repository, such as email alerts, creation of Discussion Threads or the creation of new Elements.

Discussion Threads

The Elements Repository provides a general-purpose Discussion Thread capability.

This allows discussions between users to occur in a way that relates them directly to a specific item in the Elements Repository, such as a Class, Diagram or individual Element.

The discussions can be organized by topic, which is called a “Thread” in Elements.

eTasks

The eTask Class is the center of a Microsoft Project-compatible task-management capability in the Elements Repository.

The eTask Class supports all Microsoft Project Task attributes and can be related to eResources and eProjects, which correspond to Resources and Projects in Microsoft Project.

There are custom user interface elements that support the eTask and a variety of generated reports and queries that help users view and summarize Project Management data in the Elements Repository.

Portals

Overview

After logging in to the Elements Repository, the user will see the standard Elements Portal layout if no special configuration has been performed. The content and look and feel of the Elements Repository may be considerably different than that shown here, depending on how it has been installed at your location.

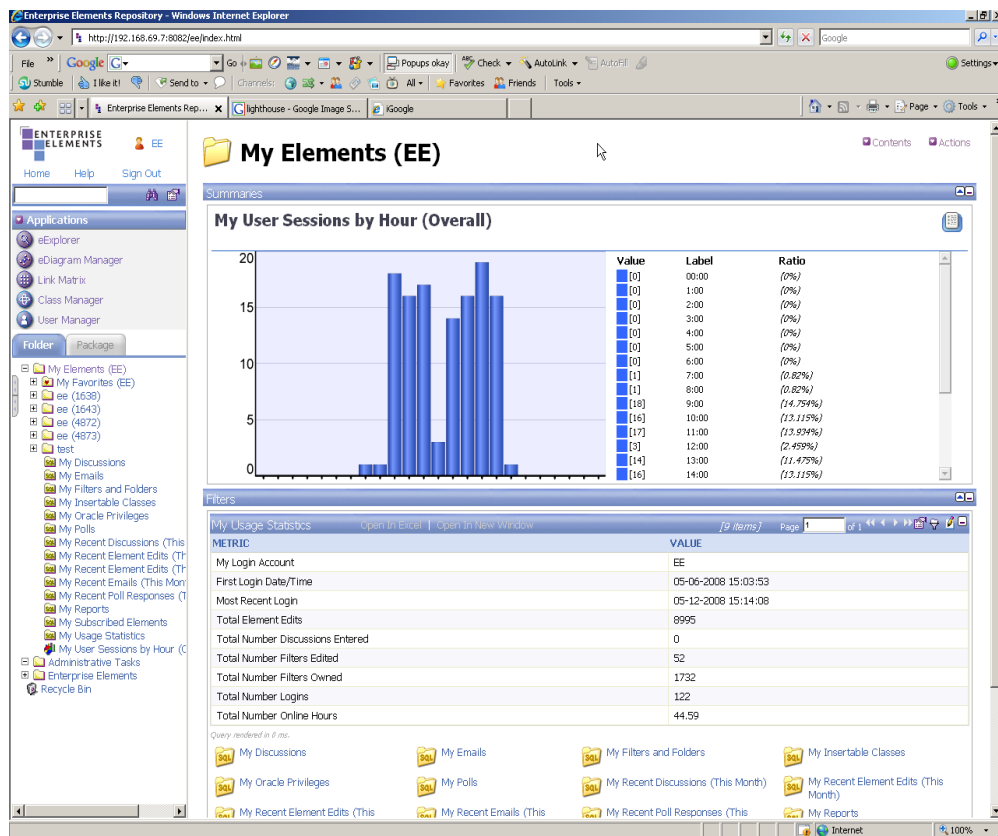


Figure 7 - Elements Repository Portal

The standard Elements Portal includes a group of functions on the left side that allow users to launch applications and navigate data within the Repository. This region of the Portal is called the "Portal Navigation Frame."

The right side of the Portal window will either contain illustrated desktops, Elements Portal Folders, or reports of various types. This region of the Portal is called the “Portal Data Frame”

The Portal Navigation Frame has multiple expandable function groups. Note that the functions available within each group may vary depending on site-specific configuration and the privileges of the user that is logged in.

Navigation Frame



Across the top of the Navigation Frame you will find an indicator of which user account is currently logged in to the repository and some menu options. These are: Home, Help, and Sign Out.

Clicking your **user name** will give you some account management options.

Home will take you to your assigned home portal. **Help** will open a help screen with several topics, and **Sign Out** will log you out of the repository, freeing a license for another user. Note that you will be automatically logged out if you are idle for too long.

Your Elements Repository will only allow the specified number of concurrent users into the system at any one time. If you need to free up a connection, then you can explicitly log out, or wait for the system to timeout from no activity.

Below this section is a Search bar. You can fill in a key word and find all elements that contain that word. There are also some tuning options for other general searches available by clicking the options button.

In the Applications section, you will find all the applications that you have privileges to run. These are described in the rest of this document, or in separate documents as appropriate.

Finally, you are presented with a hierarchic tree of portals that you can use to navigate and browse through your repository. There are two types of tree: folder and package. The folder tree is organized according to how you nest each folder in the repository, and the package tree is organized by packages alphabetically, then the classes within those packages.

Portal Data Frames

The Portal Data Frame may contain one or more of each of the Folder contents (Elements, Filters or other Folders), and they are arranged to create a “digital dashboard”-type user interface.

In addition, the Portal view is aware of whether a Filter is a Listing or Summary type. Summary Filters are grouped separately to enhance the “digital desktop/dashboard” look and feel. Options can also be selected (within the eExplorer) to determine the style of presentation of these filters.

The layout, and content of your portals will depend on how your individual repository has been configured. Useful portals that come pre-packaged with your system include the Management Desktop, where you can see important system information about Users, Classes, and Tasks, and several Enterprise Architecture desktops that allow you to browse through your data by starting with a familiar methodology such as FEAF, or DoDAF, or Zachman, or others.

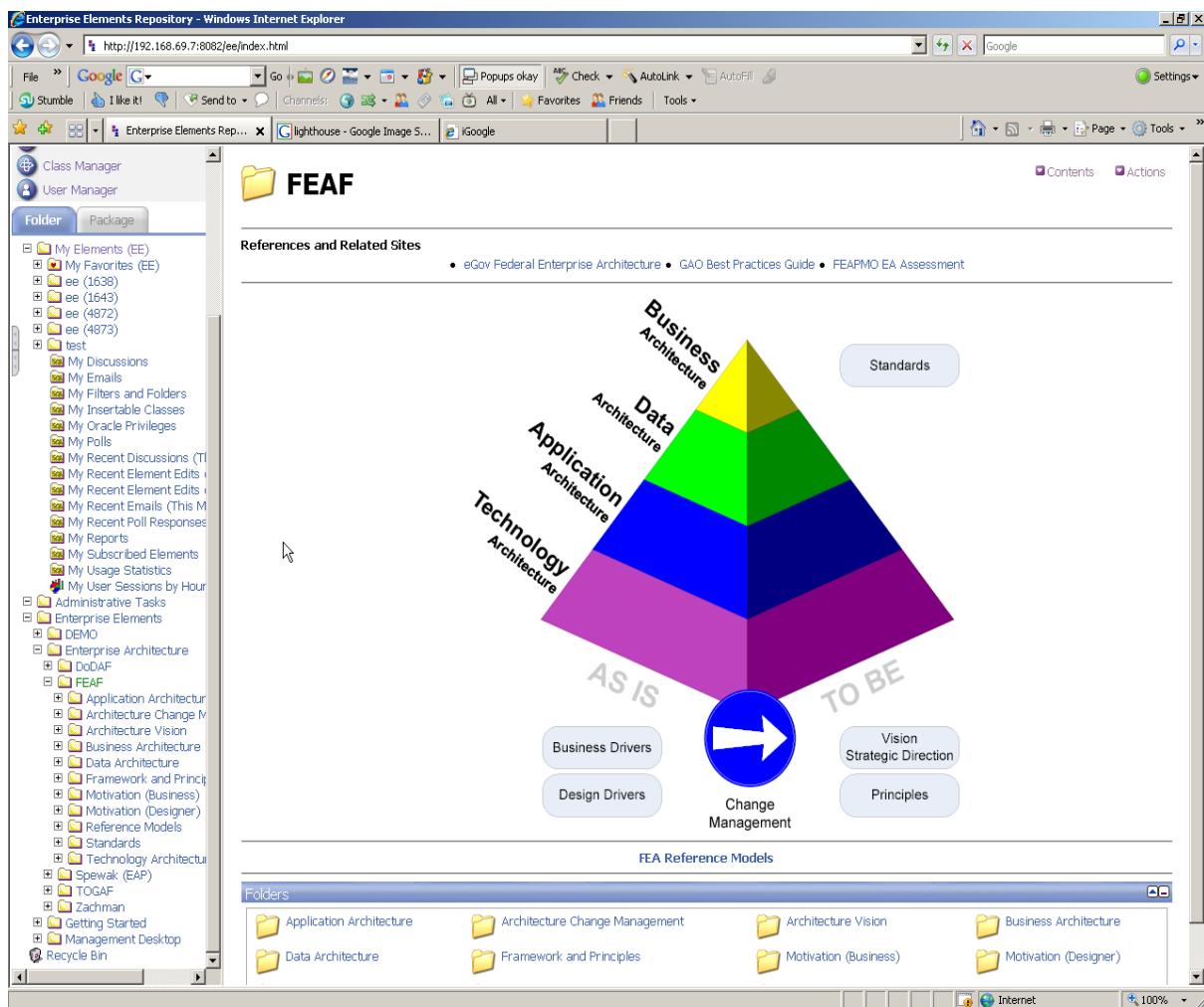
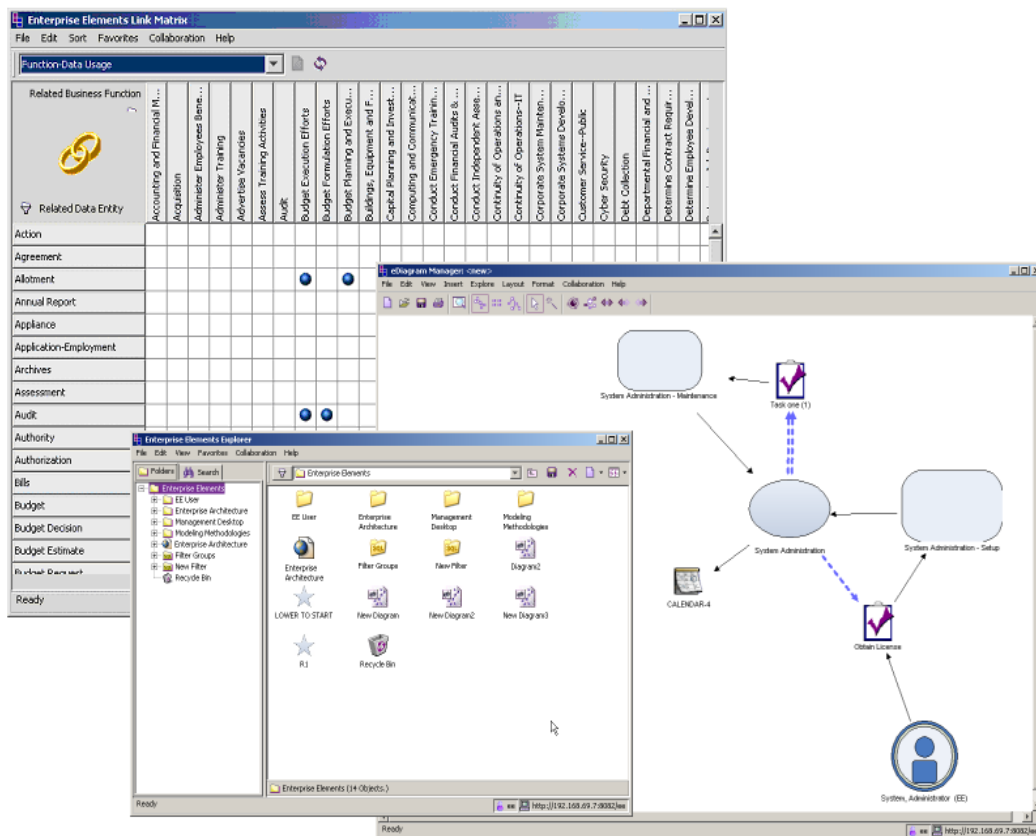


Figure 8 - Example Portal

Elements Applications

In the Elements Repository, “Elements Application” is the name given to Java Web Applications that interact directly with the Elements server and are part of the Elements installation. Elements Applications do not need to be installed on individual desktops but the Java Virtual Machine (www.java.com) is required to run them.

An Elements Application can be launched from a hyperlink within the Elements Repository or directly from a desktop shortcut (“JNLP”).



eExplorer

The eExplorer or “Elements Explorer” can be used for browsing Folders and Filters, creating or editing Elements, creating or editing Filters and for organizing/reorganizing the Folder structure.

Since the Portal hierarchy is defined by the Folder hierarchy, the Elements Explorer is also the primary environment for defining and organizing Portals.

The following Figure shows the appearance of the Elements Explorer upon initial launch.

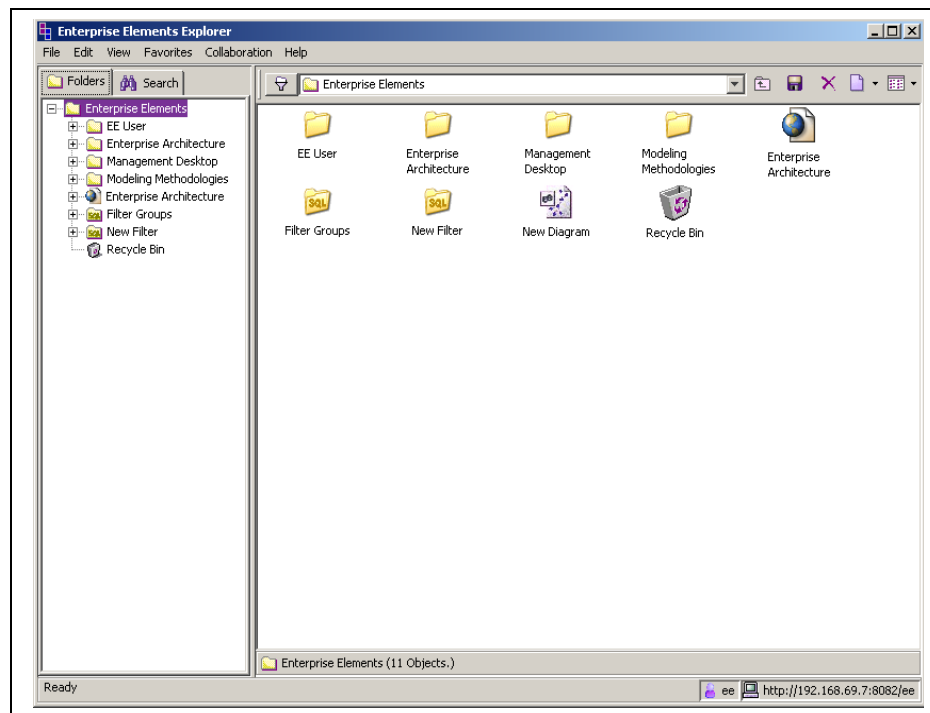


Figure 9 - eExplorer

The left region of the Explorer is called the Tree Pane and allows tree-style expansion of Folders.

The right region is called the “Data Pane” and shows the contents of any node that is selected within the Tree Pane. A number of views are available for the Data Pane, as will be explained below.

Menus

File	New	Allows you to create a new object of varying types. Folders, Filters, Elements, or HTML Markup.
	Open	Opens the selected element with the appropriate editor,

or Properties if no other editor is defined.

	Properties	Opens the Element Properties form, for editing Element attributes
	Save As	Will export any selected set of Elements to CADM XML format
	Import	Will Import CADM XML, assuming the CADM schema has been activated in the Elements Repository
	Exit	Exits the application
Edit	Cut	Will remove a Filter, Folder or Element from the current Folder context and place it in the clipboard, making it available for Pasting elsewhere. It does not remove the item from the database.
	Copy	Will place a reference to the selected Filter, Folder or Element into the clipboard, making it available for Pasting elsewhere
	Paste	Will insert a reference to an item in the clipboard into the current Folder context
	Delete	Will remove the currently selected Filter, Folder or Element from the current view. The user is prompted to determine whether the item is removed from view or removed from the Repository. Any items mistakenly removed from the Repository may be retrieved from the Recycle Bin if needed
	Merge Elements	Combines two elements of the same class into a single element. You have the opportunity to select values for each attribute from either of the source elements before the merge is completed
	Select All	Selects all items in the current view
	Invert Selection	Inverts the current selection of items
	Search	You can enter a keyword and find all elements that

contain that word. Even if you misspell it. If you like the results, you can also save your search as a new filter.

View	List	Shows items in small iconic form
	Icon	Shows items as icons
	Details	The Details View will show all the columns in the query results
	Tiles	Shows items as large icons
	Refresh	Refreshes listing of items
	View Detail Report (HTML)	Launches a local web browser filled with the detail report for the selected element.
Favorites	Add To Favorites	Adds selected item to the current user's "My Favorites" Folder
Collaboration	Discuss	Launches the Discussion Thread user interface
	Poll	Not available in this version
	Task	Launches the eTask editor and associates a new task with the element in context
Help	About	You can view the standard About box and check on system settings by clicking this menu option.

Drag and Drop

Folders, Filters and Elements can be dragged and dropped within the Elements Explorer, resulting in their rearrangement within the Elements Folder structure.

Drag and drop works slightly differently depending on the source and destination locations of the focus item.

If the source and destination are both Folders, then the focus item will be moved.

Holding the Ctrl key while dragging and dropping will result in the creation of a new reference to the same item in the new location.

If the source is a Filter, that is, if the focus item is selected from a listing of Filter results, then a drag and drop will create a new reference in the new location. It is not possible to remove items from the results of a Filter without either changing the Filter or changing the item such that the Filter no longer returns it.

SubFilter Mode

☞ The SubFilter mode (shown in the following Figure) allows the user to enter further filtering constraints within the column headers. Constraints can be entered in as many columns as desired

The subfilter is not case-sensitive and uses the “%” (percent) character as a wildcard. Any characters entered will be a valid match if found anywhere in the column.

Regular Expression syntax is also supported.

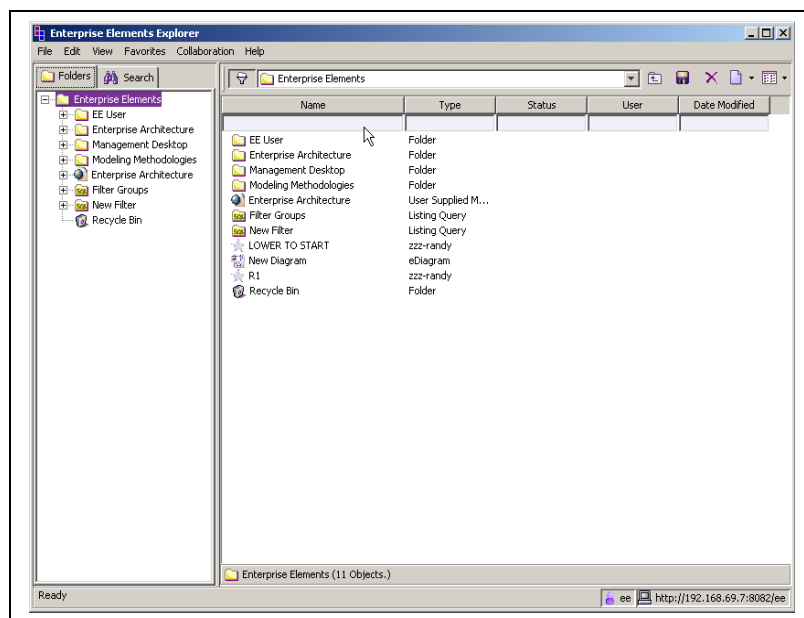


Figure 10 – eExplorer Subfiltering

To activate the filter, type the text you want in each remaining row into the space near the header and press enter.

eDiagram Manager

The eDiagram Manager application allows entry and visualization of Elements Repository information in a diagrammatic style

The following Figure shows an example Diagram as displayed in the eDiagram Manager.

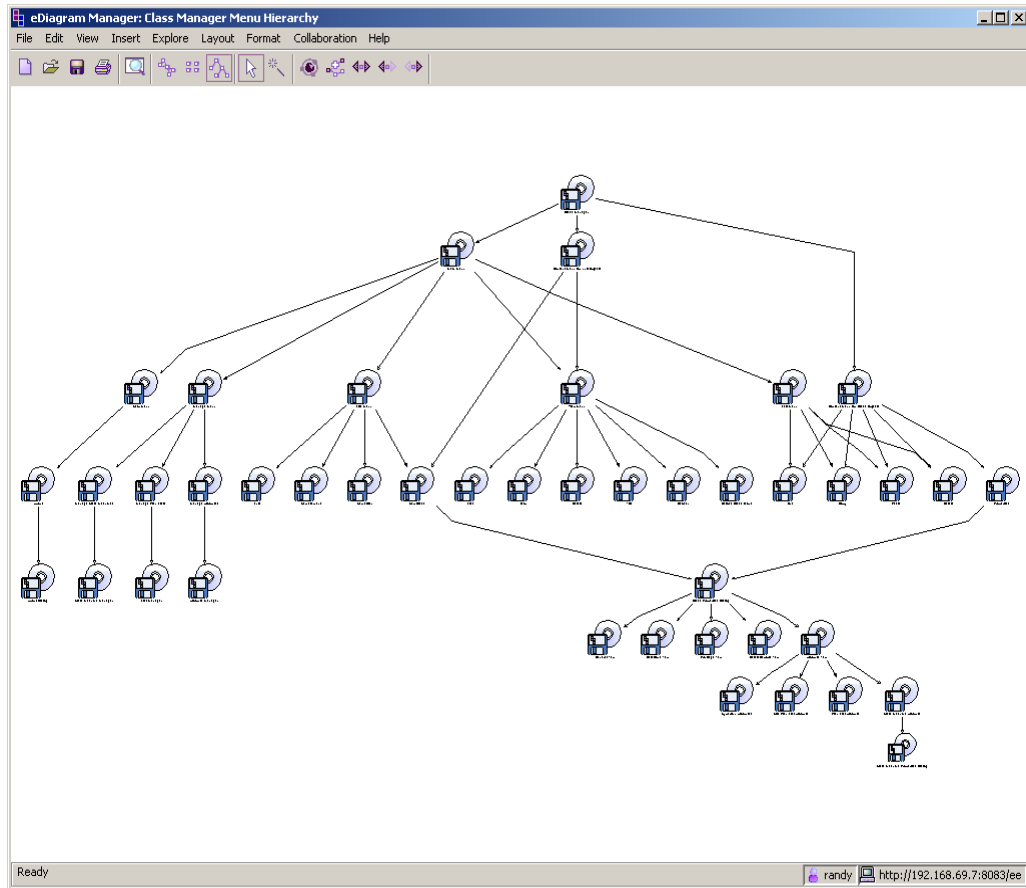


Figure 11 – eDiagram Manager

Menus

File	New	Creates a new, blank diagram
	Open	Opens a view into the Elements Folder structure and allows selection of an existing saved eDiagram.

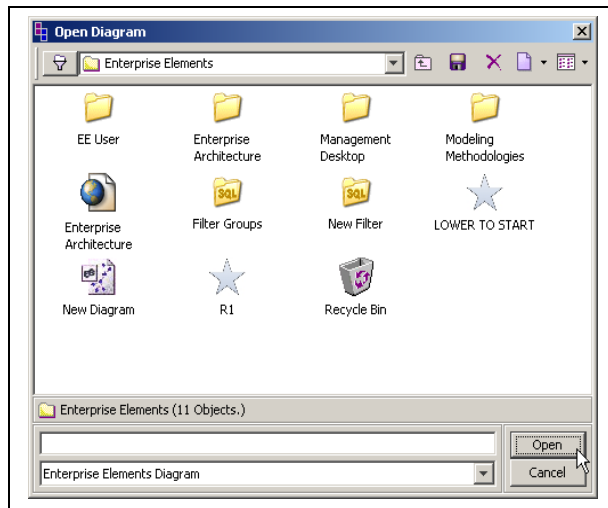


Figure 12-Diagram Open Dialog

To open a diagram, navigate to the desired item, select it with the mouse and click Open. The contents will be presented in the main Diagram display area.

Close

Closes the current diagram.

Save

Saves the current diagram.

Save As...

Saves the current Diagram with a new name, into the folder selected. Simply navigate to the desired Folder, enter the name of the new diagram and click Save.

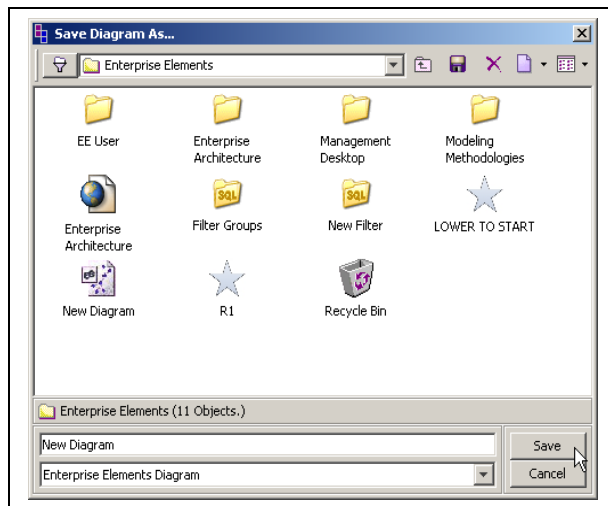


Figure 13- Save As Dialog

Export As
Image...

Exports the current diagram to a file on the local computer or on the LAN.

Elements supports JPEG, SVG, PDF and PNG formats

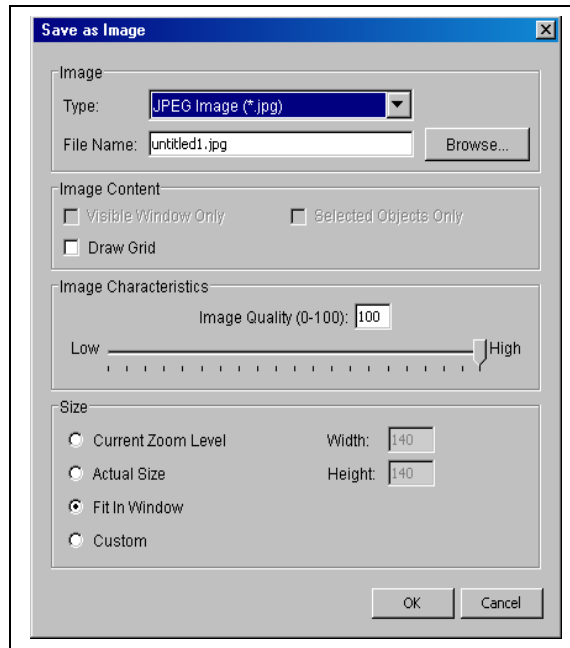


Figure 14 - Save as Image Dialog

Print Setup

Provides options for printing.

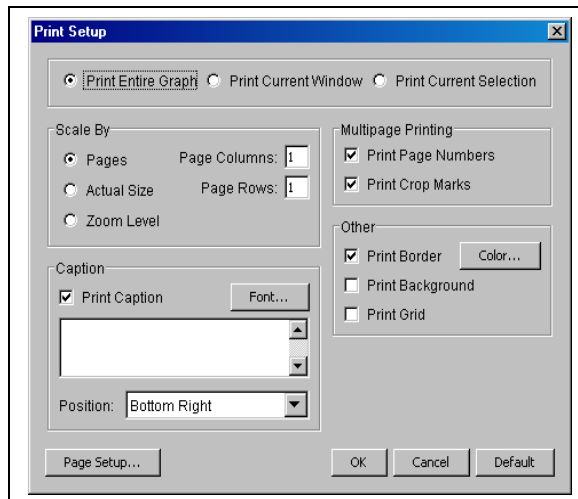


Figure 15 - Print Setup Dialog

	Print Preview	Standard Print Preview view
	Properties	Shows the Details of the Diagram Element for review and Edit.
	Exit	Exits the eDiagram Manager application.
Edit	Cut	Removes selected Element(s) from the current diagram.
	Copy	Not currently functional.
	Paste	Not currently functional
	Edit Selected Element(s)	Opens a Properties Editor for each currently selected element in the diagram.
	Merge Elements	<p>Combines two elements of the same class into a single element.</p> <p>You have the opportunity to select values for each attribute from either of the source elements before the merge is completed.</p>
	Select	<p>The select submenu allows you to quickly highlight the specified set of elements or relationships for further action. The options include:</p> <p>Select All</p> <p>All items in the diagram are selected</p> <p>Select All Elements</p> <p>The Elements in the Diagram are selected (but not the Relationships)</p> <p>Select All Relationships</p> <p>The Relationships in the Diagram are selected, but not the Elements.</p> <p>Select All Labels</p> <p>Any Labels that may be visible in the Diagram will be selected.</p>

	Invert Selection	Any selected item will become not selected and any unselected item will become selected.
	Clear Selection	Removes all selections.
	Find	Allows you to search the diagram for elements containing the entered word. (similar words will also be located, and the matching elements will be selected)
Insert	New Element	Launches Class Selector dialog. If a Class is chosen, then a new Element of that Class will be created and the appropriate property edit panel launched.
	Existing Element	Launches a simplified version of the Elements Explorer. This allows the user to use the Folders and Filters to select Elements for placement on the current diagram.
Explore	Trace between Elements	<p>This function requires the prior selection of exactly two Elements within the current diagram.</p> <p>It will find all linkage paths between the selected Elements where all links in the path follow the same direction.</p> <p>For example, if A is a parent of B and B' and B and B' are both parents of C, then a Trace performed between A and C would result in B and B' appearing on the diagram.</p> <p>In contrast, if A is a parent of B and B' and B and B' are both children of C, then a Trace performed between A and C would not retrieve B or B'.</p>
	Expand Element(s)	<p>This function requires the prior selection of one or more Elements in the current diagram.</p> <p>It will find all parent and children Elements of the selected Element(s) and place them on the current diagram.</p>
	Expand Element(s) to Parents	Similar to the Expand feature, but will only retrieve parent-linked Elements.

	Expand Element(s) to Children	Similar to the Expand, but will only retrieve child-linked Elements.
View	Zoom	<p>The Zoom submenu allows you to control the magnification of your diagram for ease of viewing. There are several choices.</p> <p>In</p> <p>Zooms the view in one increment</p> <p>Out</p> <p>Zooms the view out one increment</p> <p>To Selection</p> <p>Zooms the view in to a region surrounding the currently selected item or items.</p> <p>To Screen</p> <p>Fits the entire diagram contents into the current window size.</p>
	Show Overview	<p>Opens a thumbnail view (Overview Window) of the current diagram.</p> <p>A viewbox can be drawn within the Overview Window to cause the main diagram view to be cropped and zoomed to that frame</p> <p>See the following Figure for an example.</p>

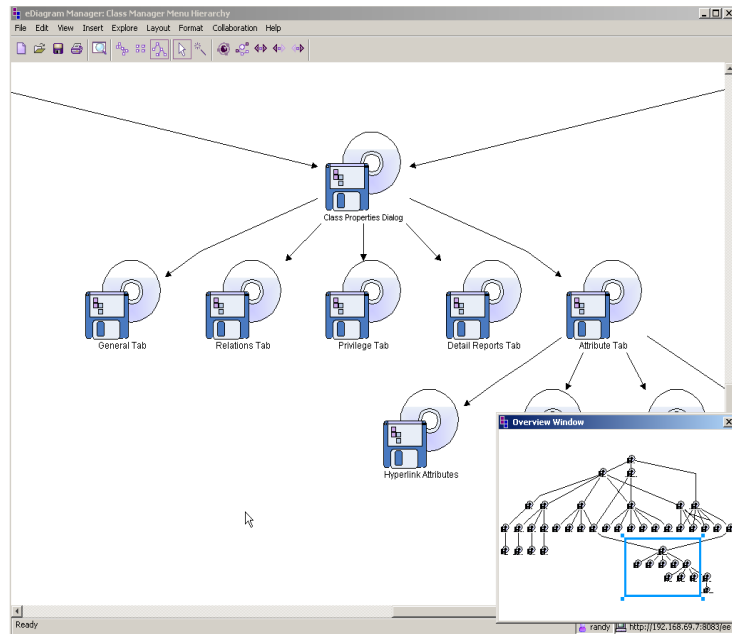


Figure 16 – eDiagram Overview Window

You can resize the viewbox or move it with the mouse to explore your diagram in more close-up detail.

Show/Hide Grid

If the diagram grid is currently showing, hides the grid. If it is currently invisible it will show the grid.

Suppress / Show Link Classes

Link classes are a special kind of class that typically occurs in a data schema when a many-to-many relationship is defined. Your Elements repository identifies this special type of class and is able to suppress elements from those classes while displaying diagrams.

The link class will be rendered as a dashed line and without the intervening element when you select Suppress Link Classes.



Figure 17 - Link Class Shown Example

Notice the element EE-85 appears inline and occurs logically between 'System Administration' and 'Obtain License'

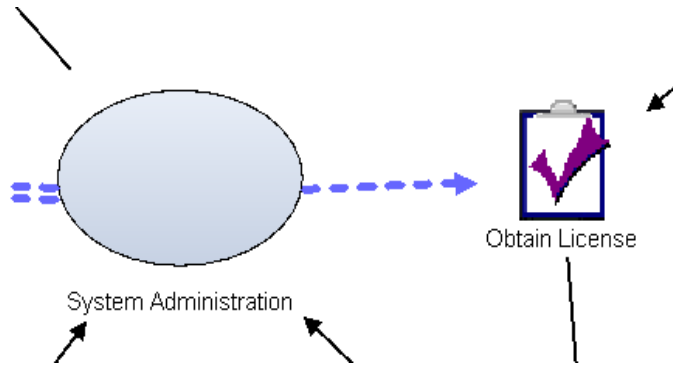


Figure 18 - Link Class Suppressed Example

Now notice that EE-85 is represented by a dashed line which directly connects 'System Administration' to 'Obtain License'.

In General, diagrams become simpler with link classes suppressed, and sometimes structure will become apparent when viewed in this way, especially in Hierarchic mode.

The links that represent link class elements can be manipulated as if they were any other element in the diagram. Including editing their attributes.

	Refresh	Refreshes in the current view.
Layout	Symmetric	The Symmetric layout evenly distributes all Elements in view, with the most-linked Element centrally located, and draws all connections as single, straight lines. A couple examples can be seen below.

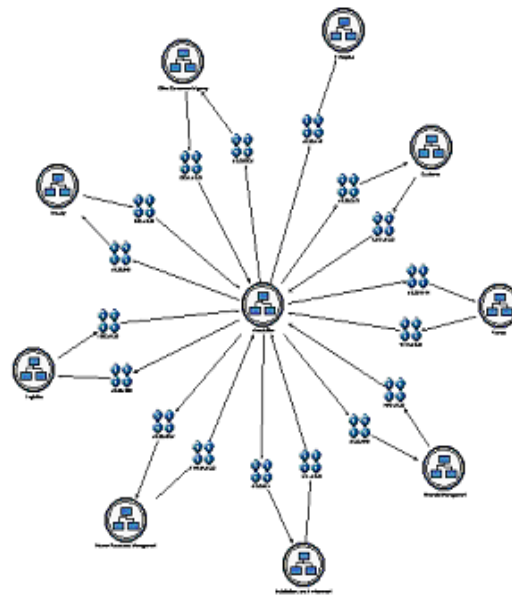
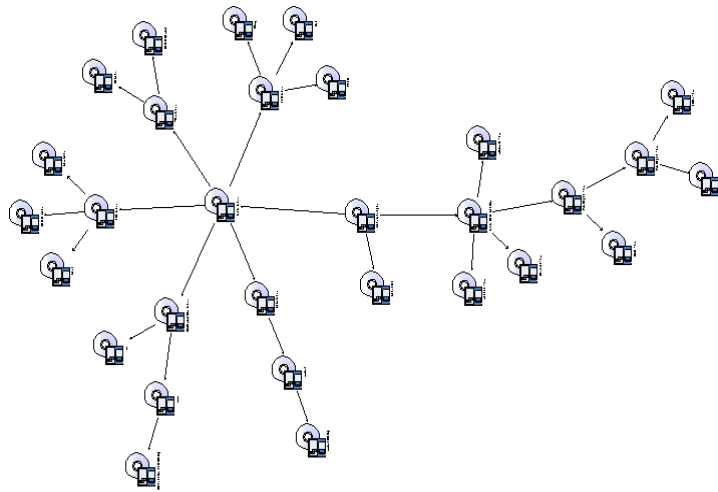


Figure 19- Example Symmetric Layouts

This view is excellent at exposing patterns of symmetry or asymmetry, or clustering behaviors in the data.

Orthogonal

The Orthogonal layout is similar to Symmetric, but orients all connection lines parallel to either the vertical or horizontal axis and adds right-angle bends where necessary.

The same two datasets (from above) are shown in

Hierarchic

The Hierarchic view organizes the Elements in view in layers according to direction of linkages. It will attempt to position the least-linked Element “first” (which may be at the left, right, top or bottom, depending on settings) and then create another layer for each step in the same link direction. This typically results in a “node tree” look and is excellent for organizational charts or functional decompositions.

Once again, the same data sets are rendered, this time in Hierarchic mode.

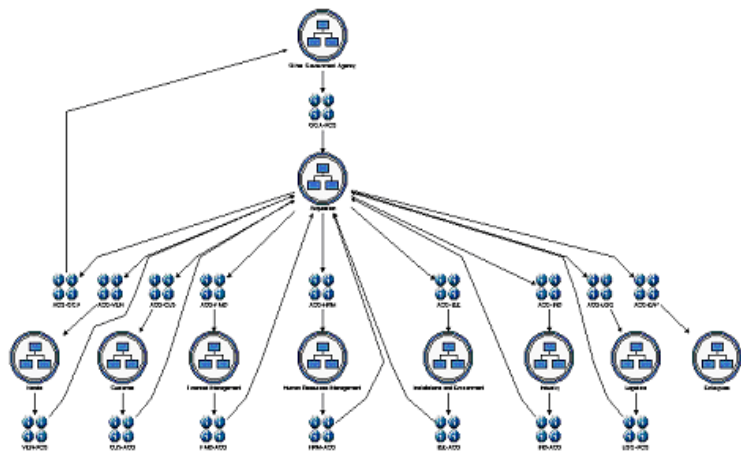
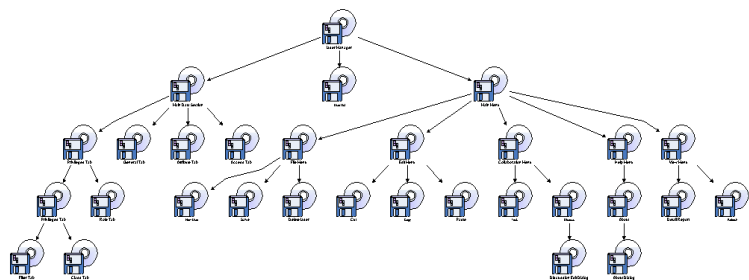


Figure 21 - Example Hierarchic Layouts

Circular

The Circular view organizes the Elements in a pattern of related circles.

Once again, the same data sets are rendered, this time in Circular mode.

Layout
Options...

A variety of options are available that influence the layout details for each layout type. Users should experiment to determine the settings they prefer.

Note that saving an eDiagram does not save the layout settings, so if a user wishes to preserve the exact look of a diagram, including layout details, then it should be exported to an external file in one of the available formats, such as SVG. – This is especially important if you manually drag elements around to reorganize the image.

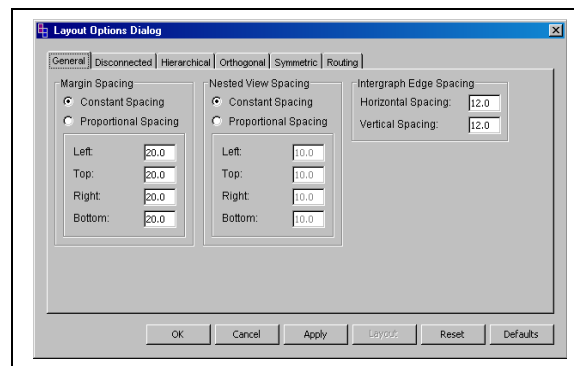


Figure 22 - Layout Options Dialog

Collaboration

Discuss
(Diagram)

Launches the Discussion Editor (see section in this document) and allows initiation or continuation of a discussion thread regarding the current Diagram.

Task
(Diagram)

Launches the eTask Editor (see section in this document) and allows the creation of an eTask related to the current Diagram.

Task
(Selected
Elements)

Launches the eTask Editor (see section in this document) and allows the creation of an eTask related to the selected elements.

Help

About

You can view the standard About box and check on system settings by clicking this menu option.


Toolbar




The eDiagram Toolbar provides one-click access to a number of Menu Items.

The functions are identical to those available through the menus with the exception of two items: The selection tools. These are described in the following section:

Select

 Changes the cursor to Selection mode. This is the normal operating mode of the Diagram Manager.

Link Wand

 Changes the cursor to the Link Wand. This allows linking of Elements to one another.

To link Elements, select the Link Wand, click on the intended Parent in the link relationship and drag the cursor to the intended Child.

It is important to note that not all elements are designed to be linked to all other elements. Once a parent element is selected, only appropriate children will remain highlighted and available for linking. If the link is not completed to a valid child element, no link will be created.

Link Matrix

The Link Matrix Application allows linking between Elements of Classes that are referenced by Link Classes. In other words it is a many-to-many linking view.

When the Link Matrix is launched, it appears empty, as below.

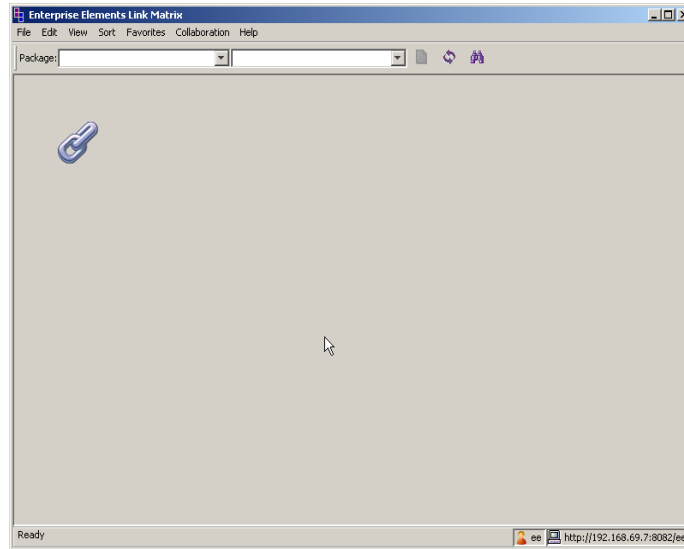


Figure 23 – Link Matrix empty

A user can then select a Link Class from the main drop-down menu. This will populate the vertical and horizontal axes with Elements from the Classes referenced by the “SQL Pick List” attributes of the Link Class. The initial set of Elements is defined by the specific Filter related to the SQL Pick List attribute.

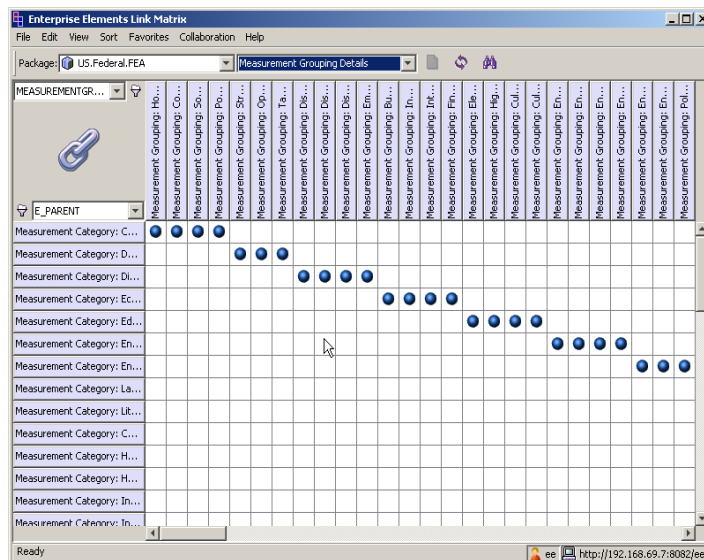


Figure 24 – Link Matrix populated

Menu	Item	Description
Menus	File	
	New	Allows you to create a new object of varying types. Folders, Filters, Elements, or HTML Markup.
	New Link	Adds a new Link Element to the currently-selected cell. This creates a relationship between the row and column Elements via this new Link Element and then present the user with a form allowing population of additional Attributes
	Exit	Exits the Link Matrix application.
Edit	Cut	Inactive
	Copy	Inactive
	Paste	Inactive
	Delete	Deletes the selected Link Element
	Merge Elements	Combines two elements of the same class into a single element. You have the opportunity to select values for each attribute from either of the source elements before the merge is completed.
	Edit Filter <Row Filter>	Opens the Filter Editor for the Filter related to the SQL Pick List referencing the <Row> Class
	Edit Filter <Column Filter>	Opens the Filter Editor for the Filter related to the SQL Pick List referencing the <Column> Class.
View	Swap Axes	This action will place the contents currently in the columns into the rows, and the values in the rows into the columns.
	Refresh	This will reload the matrix.
Sort	Columns	Default Sort Sorts the Columns according to the ORDER BY clause of the Column Filter.
		Subfilter Sort Sorts the Columns according to the user-defined Subfilter

sort.

See the Element Explorer section for more information on Subfilters.

Link Density Descending

Sorts the Columns in decreasing order of linkage count.

Link Density Ascending

Sorts the Columns in increasing order of linkage count

Rows

Default Sort

Sorts the Rows according to the ORDER BY clause of the Row Filter.

Subfilter Sort

Sorts the Rows according to the user-defined Subfilter sort.

See the Element Explorer section for more information on Subfilters.

Link Density Descending

Sorts the Rows in decreasing order of linkage count.

Link Density Ascending

Sorts the Rows in increasing order of linkage count

Favorites

Add to Favorites

Adds the selected elements to the users Favorites Folder

Collaboration

Discuss

Start the Discussion Editor and allows the start or continuation of a Discussion Thread regarding the selected Element(s).

Poll

Not functional in this version

Task

Start the eTask Editor and allows the creation of an eTask regarding the selected Element(s)

Help

About

Several tools are also available that operate on either the rows or columns in a currently-displayed matrix.

They are all available within the “Subfilter Settings” feature that is invoked by clicking the () symbol.

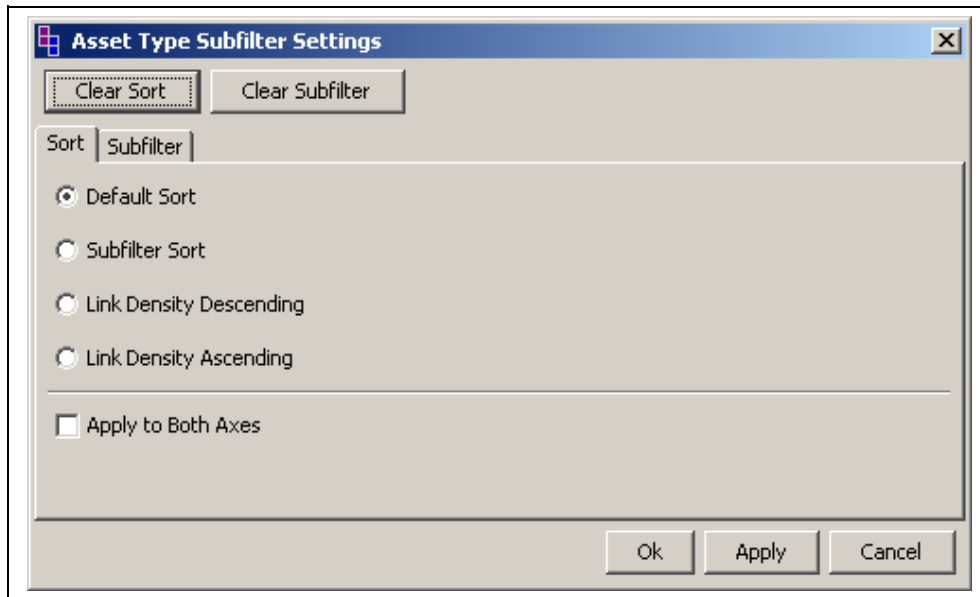


Figure 25 – Subfilter Settings Dialog

These controls perform the same actions as listed in the menu section. The subfilter tab limits the row or column to the elements that match the user supplied text.

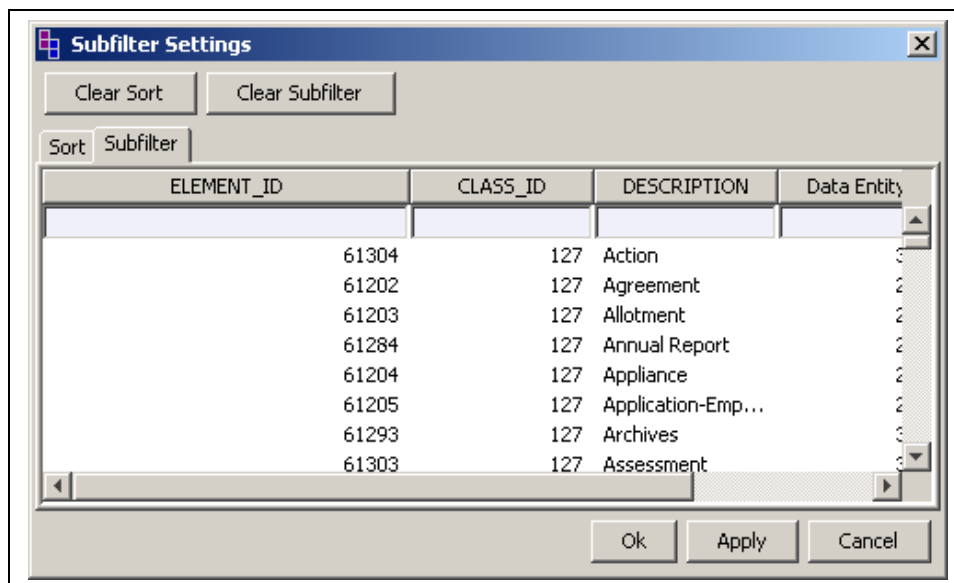


Figure 26

Common Components

All Elements Applications use some basic components that look and act the same irrespective of where they are used

Element Properties Editor

This allows direct editing of Element attributes. The overall look and feel of this editor is the same, irrespective of the Element's Class, but the specific attributes available are a function of the Class.

General Tab

The general tab shows the element type and label.

Attribute Tab

The Attributes tab allows editing of Element Attributes

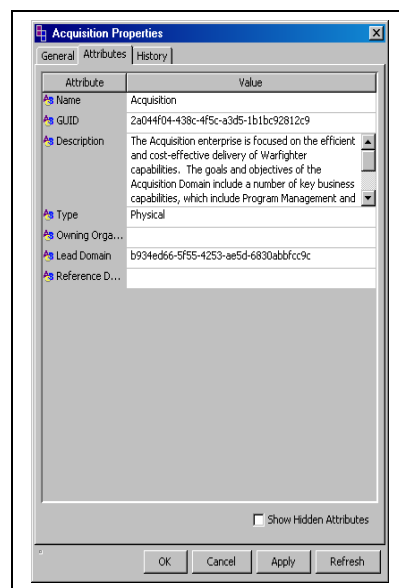


Figure 27

Some of the display details, such as field order and height, are adjustable by the System Administrator

History Tab

The History tab shows all past versions of the Element, who performed each edit, and when each edit was performed.

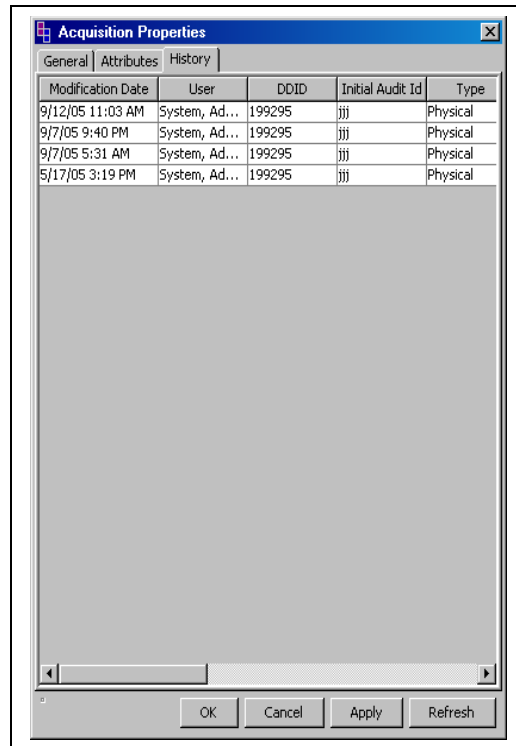


Figure 28 – Element Properties > History Tab

If two history records in the list are highlighted, then a context menu is available that will show the difference between them.

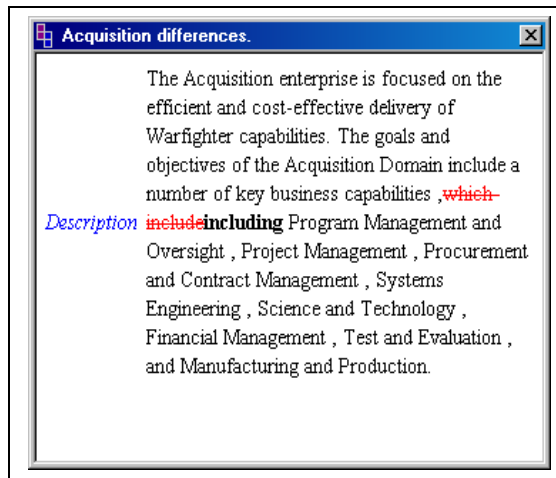


Figure 29 – Red line difference results

Filter Editor

General Tab

The general tab show the name of the filter.

SQL Tab

The SQL tab contains three panes, the SQL Pane, the Filter Metadata Pane and the Results Pane.

Filter Metadata is additional information about the Filter that assists the Elements user interface in choosing how to display the Filter results.

A more detailed explanation is available in the Admin Guide.

All Filter Metadata for built-in and autogenerated Filters is already defined.

If the Query By Example wizard is used to construct a Filter, the Filter Metadata is also defined automatically.

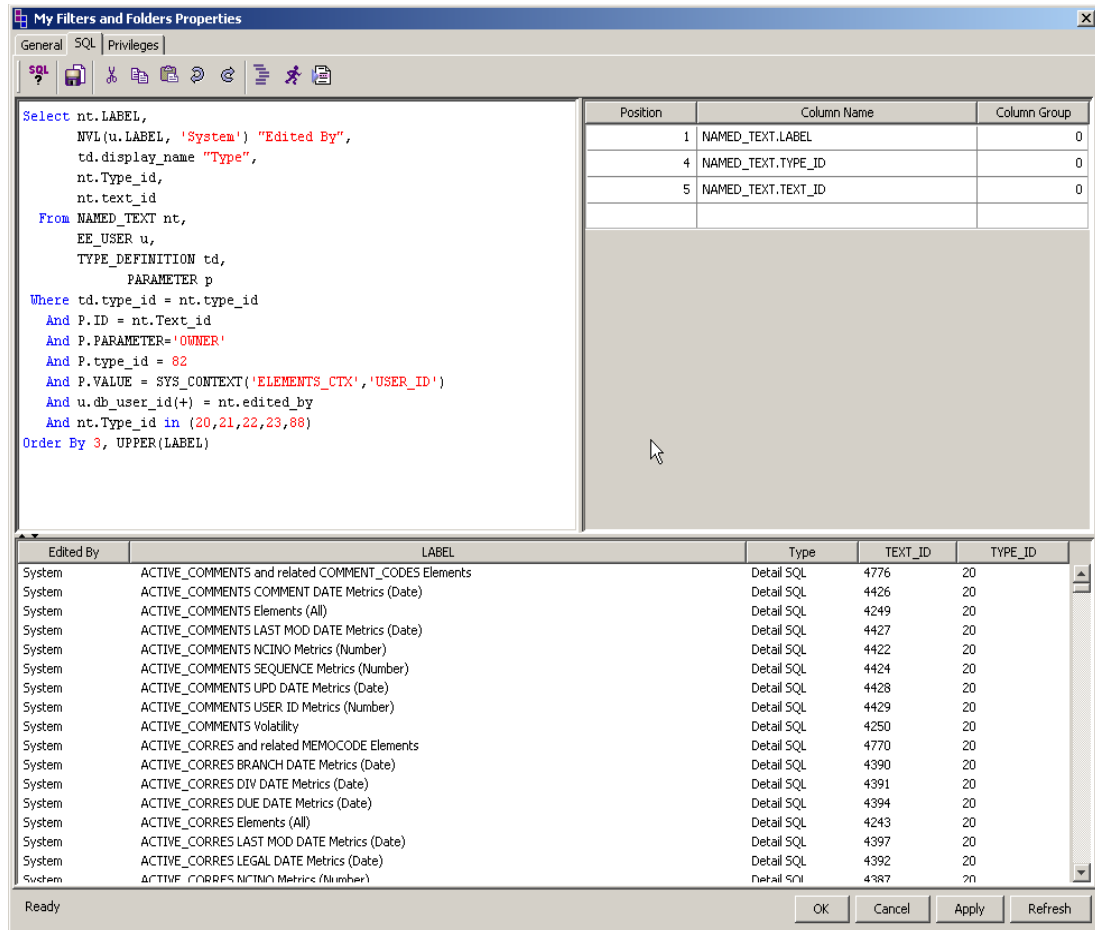


Figure 30

Create New SQL

Launches the Query By Example wizard to create a new Filter

Save As...

Creates a copy of the current Filter and saves it at the root level of the Elements Folder structure (EE Root)

Cut

Cuts selected SQL text to the clipboard.

Copy

Copies selected SQL text to the clipboard.

Paste

Pastes any text on the clipboard into the current SQL Pane.

Explain Plan

Displays output of the native Oracle “Explain Plan” function.

Run

Runs the contents of the current SQL Pane.

Run Selection

Runs the contents of the currently selected text.

Results are displayed in the Results Pane.

Permissions Tab

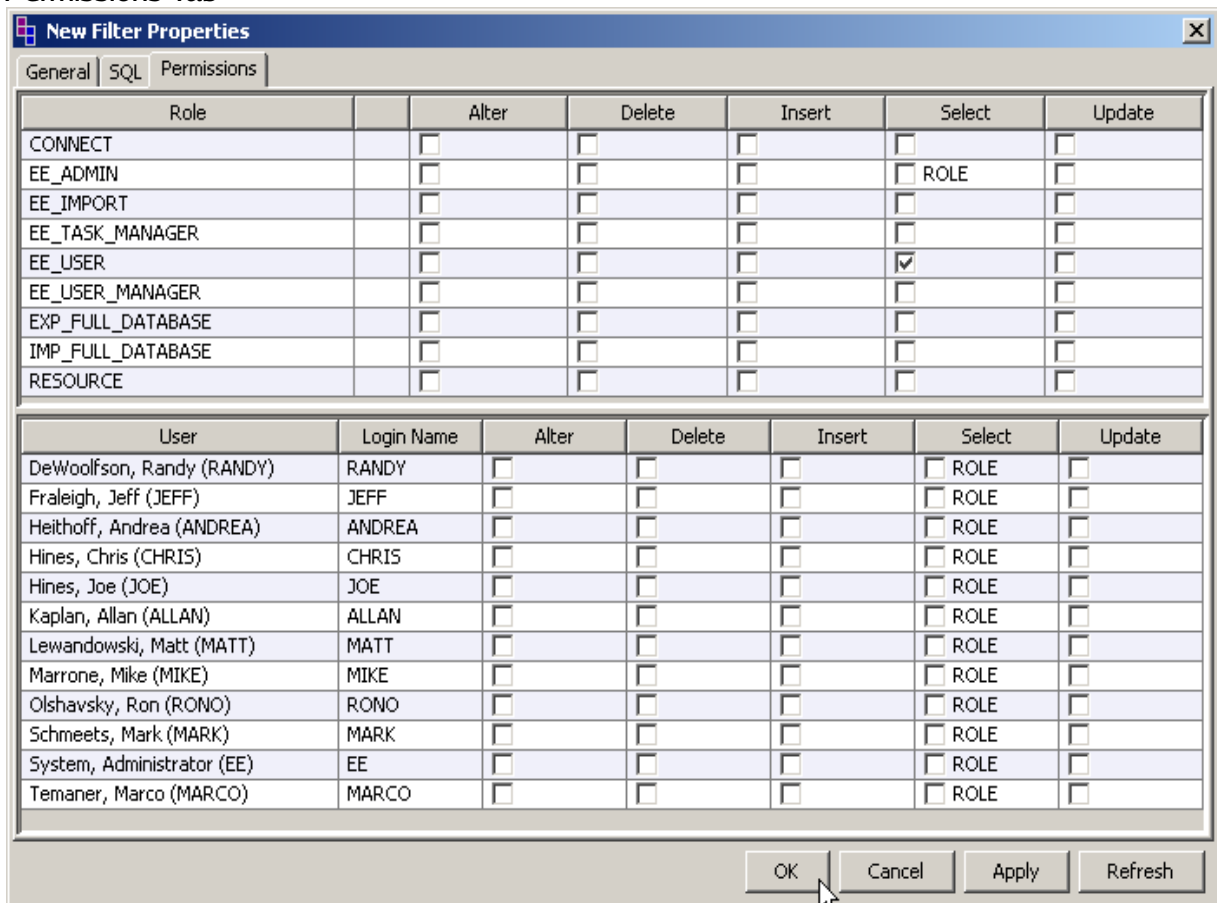


Figure 31 - Filter Properties > Permissions Tab

New Filter Wizard

The New Filter wizard can create Filters. Including filters that return listings of Elements from a single Class, based on Attribute constraints or restrictions.

Match values entered within Text attributes will be treated as case-insensitive and implicitly include wildcards before and after the value.

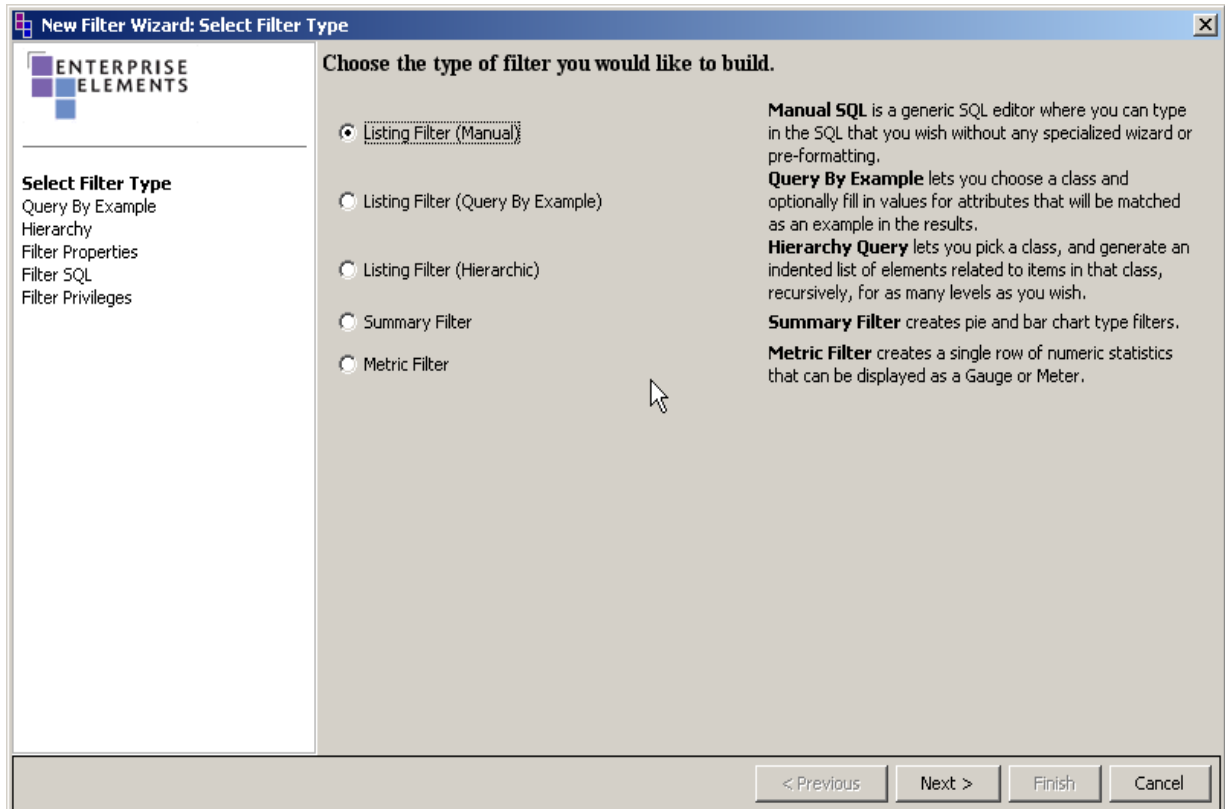


Figure 32-New Filter Wizard

Discussion Editor

The Discussion Editor allows the creation of a new Discussion Thread or the continuation of an existing one.

If the Discussion Editor is launched for an item that does not yet have any Threads, then a new Thread will be created and the user will be able to initiate discussion.

If a Thread already exists, then the user may Reply to that Thread or create a new Thread.

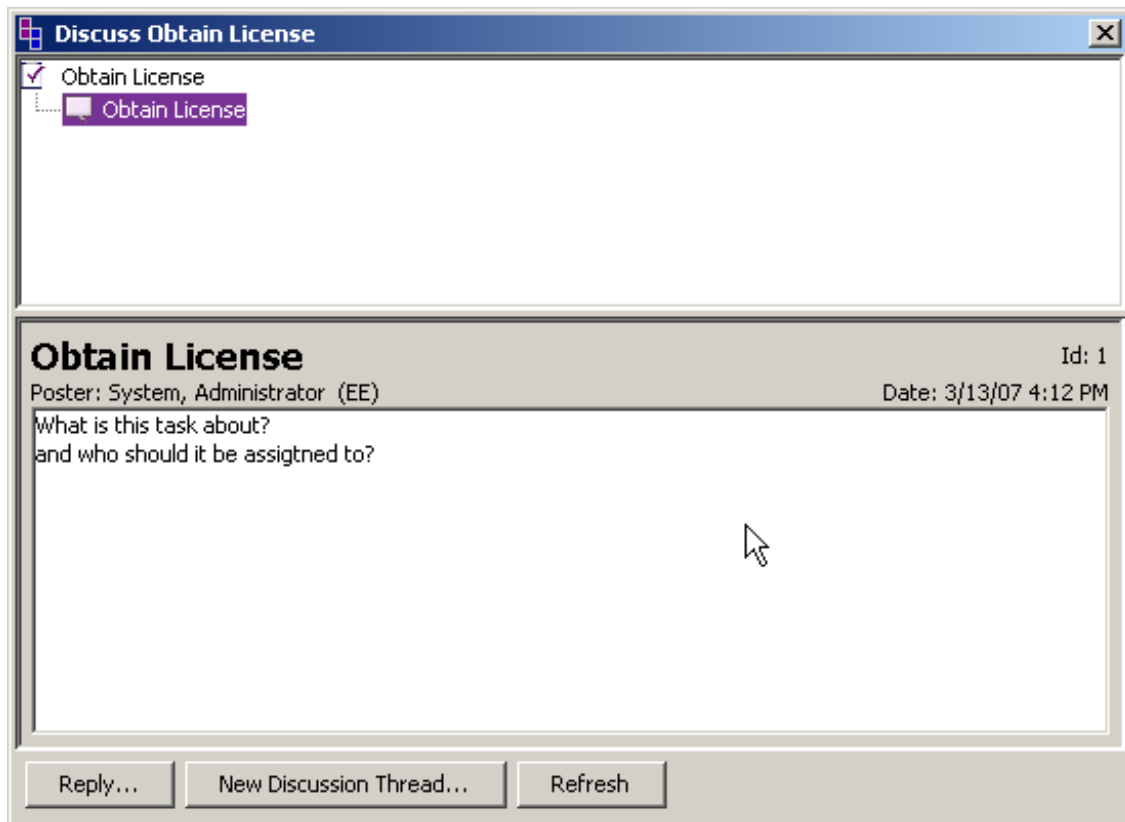
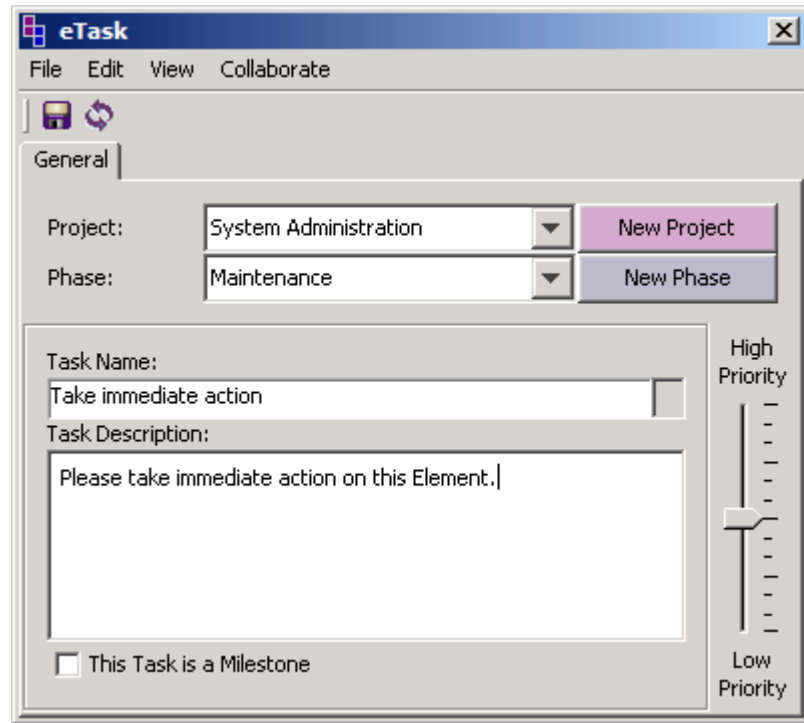


Figure 33 – Discussion Editor

eTask Editor

If the “Task” function is invoked from anywhere within one of the Elements Applications, the following form appears.



The screenshot shows the eTask Editor window with the General tab selected. The window title is "eTask" and it has a menu bar with "File", "Edit", "View", and "Collaborate". Below the menu bar is a toolbar with a save icon and a refresh icon. The General tab contains the following fields and controls:

- Project:** A dropdown menu showing "System Administration" and a "New Project" button.
- Phase:** A dropdown menu showing "Maintenance" and a "New Phase" button.
- Task Name:** A text input field containing "Take immediate action".
- Task Description:** A text area containing "Please take immediate action on this Element.|".
- Priority:** A vertical slider control ranging from "High Priority" at the top to "Low Priority" at the bottom, with a slider knob positioned in the middle.
- Milestone:** A checkbox labeled "This Task is a Milestone" which is currently unchecked.

Figure 34 – eTask Editor, General Tab

The General Tab allows the task to be named, described and associated with a Project (eProject Element) or Phase (ePhase Element). Projects and Phases can be created ahead of time as normal Elements, or created on the fly with the “New Project” and “New Phase” buttons, respectively.

Once a Task Name (and, optionally, Task Description), save the eTask (using the tool bar or the File->Save menu item) and a number of additional tabs will appear, allowing the user to enter additional information about the eTask, if desired.

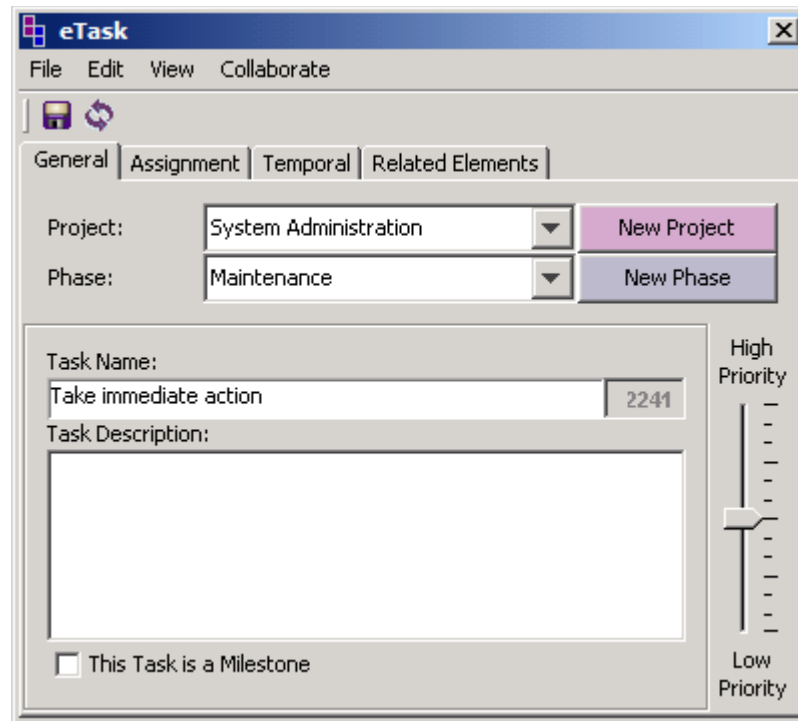


Figure 35 – eTask Editor, Additional Tabs

The Features of the additional tabs are as follows:

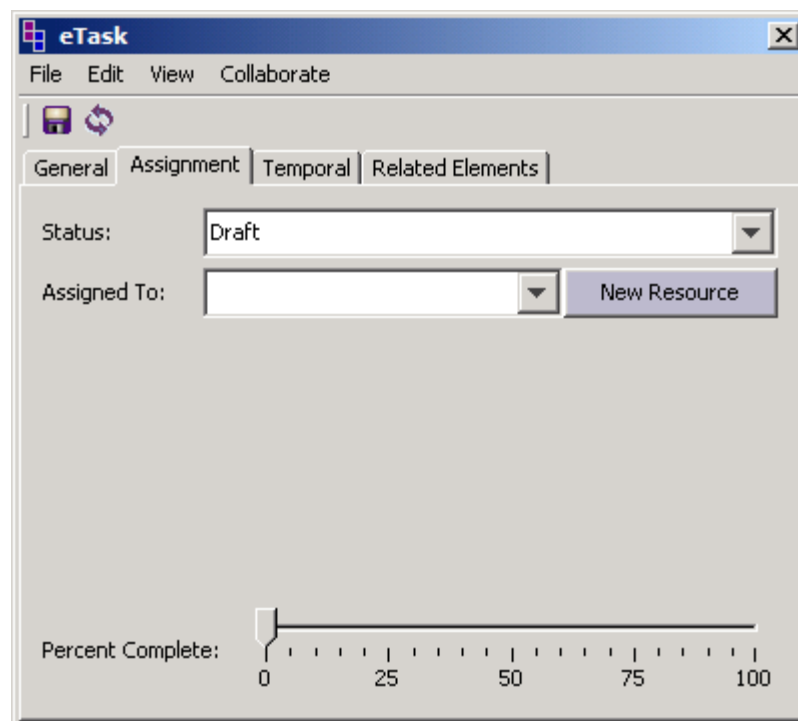


Figure 36 – eTask Editor, Assignment Tab

The Assignment Tab allows a status and assignee to be defined. A default Project Process ships with the Elements Repository and controls this Status. It is the “Task States” process and can be modified by the customer, if desired.

The assignee for an eTask is an eResource. An eResource is automatically created for each User in the Elements Repository, but it is also possible to create eResource Elements manually. If an eResource is created manually, a corresponding Elements User is *not* created.

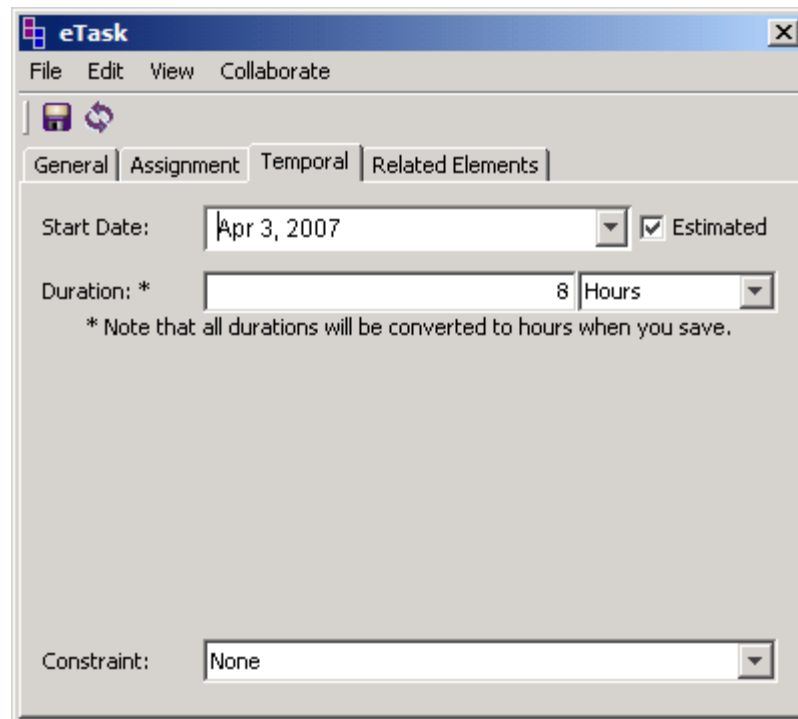


Figure 37 – eTask Editor, Temporal Tab

The Temporal Tab allows entry of time- and dependency-related information.

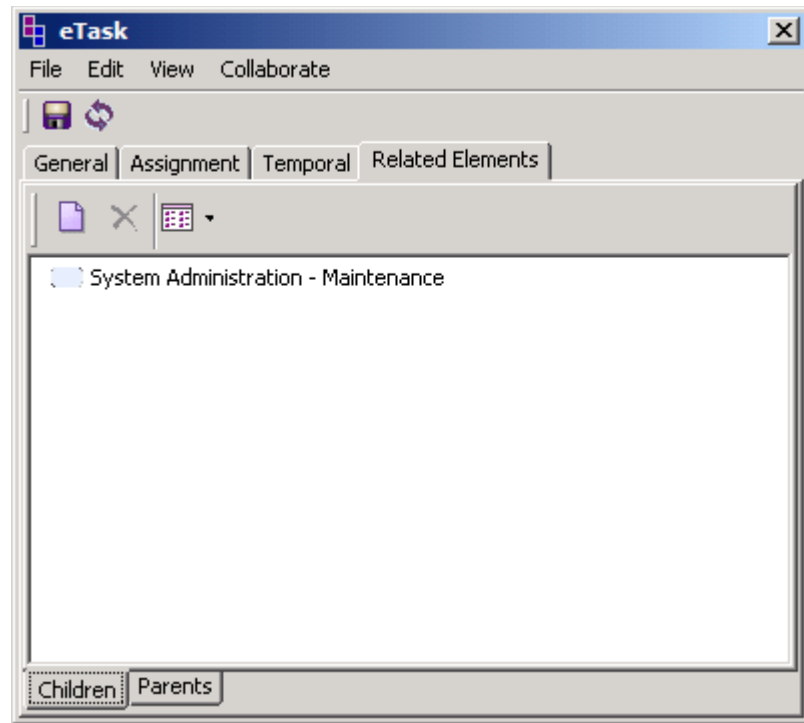


Figure 38 -- eTask Editor, Related Elements Tab

The Related Elements tab shows all Elements in the Repository that are directly related to the eTask.

Class Selector

The Class Selector is usually invoked when a user wishes to create a new Element.

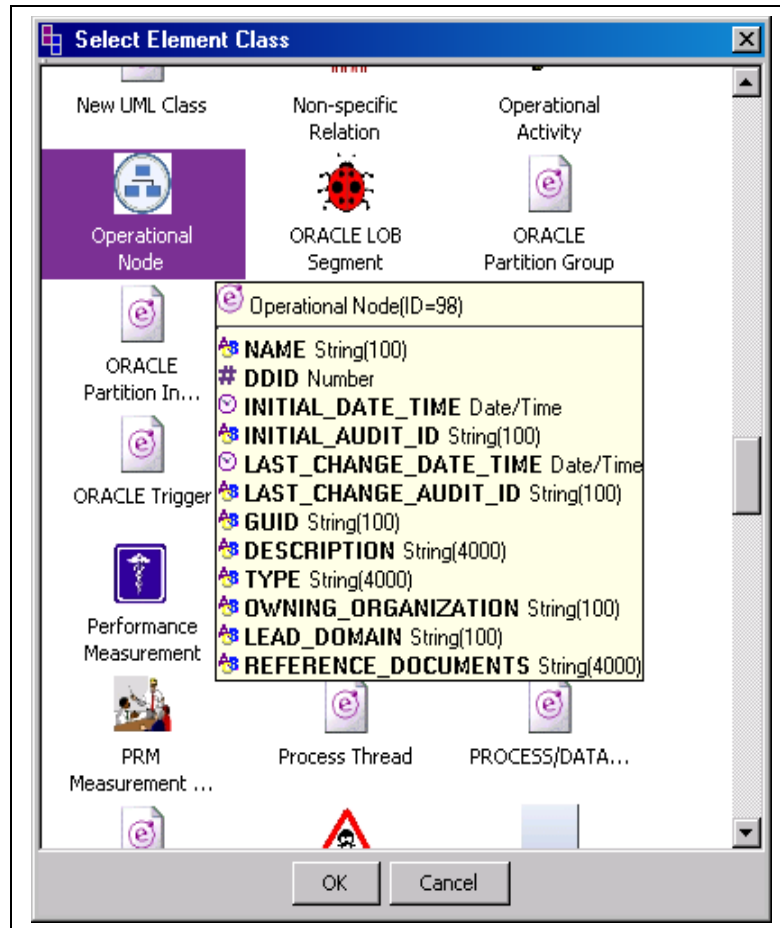


Figure 39 – Class Selector

The mouse-over popup for each Class will show the Attributes of that Class.

A right-click will allow access to the Class' full property set, including Relationships and Security settings.

A double-click will select that Class as the type for the new Element.