



**Core Features Guide**

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**SAP® Sybase® PowerDesigner®**  
**16.5 SP03**

Windows

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# Contents

## **PART I: Modeling with PowerDesigner .....1**

### **CHAPTER 1: Getting Started with PowerDesigner .....3**

<b>The Welcome Page .....</b>	<b>4</b>
<b>PowerDesigner Models .....</b>	<b>6</b>
<b>Creating a Model .....</b>	<b>9</b>
Attaching Extensions At Model Creation Time .....	11
Model Templates .....	11
<b>Accessing the Repository .....</b>	<b>12</b>
Setting up PowerDesigner for Direct Access .....	13
Setting up PowerDesigner for Access Via the Proxy ....	14
Connecting to a Repository .....	15
Connecting Automatically to the Default Repository .....	17
Changing Your Repository Password .....	17
<b>Connecting to a Database .....</b>	<b>18</b>
Configuring ODBC Machine and File Data Sources .....	19
Configuring Connection Profiles .....	21
Connection Profile Properties .....	24
Connection Parameters Window .....	24
Native Connection Profile Example .....	25
JDBC Connection Profile Example .....	26
Data Connection Tools .....	26
Connecting to a Data Source .....	27
Running SQL Queries Against Your Database .....	28
<b>License Management .....</b>	<b>28</b>
License Management Wizard .....	29
Obtaining a Mobile License .....	31
Troubleshooting Licensing Problems .....	31

<b>PowerDesigner Documentation .....</b>	<b>31</b>
<b>SAP Platform Support .....</b>	<b>32</b>
<b>Next Steps .....</b>	<b>33</b>
 <b>CHAPTER 2: The Browser .....</b>	 <b>35</b>
<b>The Glossary .....</b>	<b>36</b>
Using Glossary Terms in Your Models .....	37
Term Properties .....	39
<b>The Library .....</b>	<b>39</b>
Reusing Library Objects in Your Models .....	40
<b>The Repository Browser .....</b>	<b>41</b>
<b>Workspaces .....</b>	<b>42</b>
<b>Folders .....</b>	<b>42</b>
<b>Models .....</b>	<b>43</b>
<b>Packages .....</b>	<b>44</b>
Creating a Package .....	45
Package Properties .....	45
Controlling the Namespace of a Package .....	46
 <b>CHAPTER 3: Projects and Frameworks .....</b>	 <b>47</b>
<b>Creating a Project .....</b>	<b>48</b>
<b>Adding Model and File Documents to a Project .....</b>	<b>49</b>
Project Diagrams .....	50
Converting a Set of Repository Documents into a Project .....	51
Opening Project Documents .....	52
Viewing Dependency Links .....	52
Rebuilding Dependency Links .....	52
Project and Framework Display Preferences .....	53
Project Checks .....	55
Model and File Checks .....	55
Framework Node and Cell Checks .....	55
<b>Completing Framework Diagrams and Matrices .....</b>	<b>56</b>
Navigating in Framework Diagrams and Matrices .....	59



Attaching a Document to a Framework Node or Cell ...	59
Example: Creating a PDM from a Cell's Floating List .....	60
Example: Creating a List of Processes from a Node's Contextual Menu .....	61
Deleting Documents from Framework Nodes and Cells .....	61
Working with Floating Lists .....	62
Working with the Framework Node and Cell Contextual Menu .....	63
<b>Designing Framework Diagrams and Matrices .....</b>	<b>63</b>
Creating a Framework Diagram .....	63
Decomposing a Framework Node .....	64
Creating a Framework Matrix .....	64
Specifying Framework Node and Cell Actions .....	65
Example: Specifying a Model Action .....	66
Example: Specifying a Diagram Action .....	67
Example: Specifying a List Action .....	68
Example: Specifying a Model Generation Action .....	70
Example: Specifying an Object Generation Action .....	71
Example: Specifying a File Action .....	72
Example: Specifying a Matrix Action .....	74
Example: Specifying a Script Action .....	75
Styling Framework Nodes and Cells .....	78
<b>Project and Framework Templates .....</b>	<b>78</b>
<b>Project and Framework Properties .....</b>	<b>81</b>
Project Properties .....	81
Model and File Document Properties .....	82
Dependency Link Properties .....	82
Framework Matrix Properties .....	83
Framework Column and Row Properties .....	84
Framework Node, Cell and Additional Area Properties .....	84

Framework Action Properties .....	86
Framework Link Properties .....	88
<b>CHAPTER 4: Objects .....</b>	<b>89</b>
<b>Creating Objects from the Toolbox .....</b>	<b>89</b>
<b>Creating Objects from the Browser .....</b>	<b>90</b>
<b>Creating Objects from an Object List .....</b>	<b>91</b>
<b>Importing Objects from Excel Files .....</b>	<b>91</b>
Preparing Your Excel File for Import .....	94
Excel Import Options .....	96
<b>Importing Objects from XML Files .....</b>	<b>97</b>
<b>Object Properties .....</b>	<b>98</b>
Customizing a Property Sheet .....	99
Notes Tab .....	101
Preview Tab .....	102
Finding Text Using Regular Expressions .....	104
Requirements Tab .....	105
Version Info Tab .....	106
Dependencies Tab .....	106
Object Namespaces .....	107
<b>Object Lists .....</b>	<b>108</b>
Filtering a List Using In-Column Filters .....	111
Customizing Object List Columns and Filtering Lists ..	113
Customizing Columns in Lists Containing	
Multiple Types of Objects .....	113
Defining a Filter Expression .....	116
Adding Items to and Reordering Items in a List .....	117
Adding an Item from a Selection List .....	118
Selecting an Object from a Selection Tree .....	121
<b>Moving, Copying, and Deleting Objects .....</b>	<b>122</b>
Dragging and Dropping Objects .....	122
Copying and Pasting Objects .....	123
Deleting Objects .....	124
Moving Objects from One Package to Another .....	126

<b>Finding Objects .....</b>	<b>127</b>
Find Parameters .....	128
<b>Business Rules .....</b>	<b>131</b>
Creating a Business Rule .....	131
Business Rule Properties .....	131
Applying a Business Rule to a Model Object .....	133
<b>File Objects .....</b>	<b>134</b>
Creating a File Object .....	134
File Object Properties .....	135
Attaching a File to a Model Object .....	136
<b>Extended Objects, Sub-Objects, and Links .....</b>	<b>136</b>
<b>Checking Models .....</b>	<b>137</b>
Correcting Errors in the Check Model Result List .....	139
Checking Generic Objects .....	140
Business Rule Checks .....	140
Extended Object/Link Checks .....	141
File Checks .....	142
Replication Checks .....	142
Checking Glossary Compliance .....	142
<b>Naming Conventions .....</b>	<b>143</b>
Creating a Naming Template .....	146
Name and Code Conversion Scripts .....	146
Creating a Conversion Table .....	149
.convert_name and .convert_code Macros .....	150
.delete and .replace Macros .....	151
.foreach_part Macro .....	152
<b>Spell Checking .....</b>	<b>153</b>
<b>Extending Objects .....</b>	<b>154</b>
Adding New Properties to an Object .....	154
Adding a New Attribute to an Object .....	154
Adding a New Collection to an Object .....	157
Customizing an Object Property Sheet Tab .....	158
Managing Extensions .....	159
Customizing the Generation of Files for an Object .....	160
Using Artifacts in a Model .....	160

Defining an Artifact .....	164
Managing Artifacts .....	165
Generated Files Tab .....	166
<b>Applying Transformations to Objects .....</b>	<b>167</b>
<b>Exporting Objects to Troux Semantics .....</b>	<b>168</b>
 <b>CHAPTER 5: Diagrams, Matrices, and Symbols .....</b>	<b>169</b>
<b>Diagrams .....</b>	<b>169</b>
Creating a Diagram or a Diagram from a Selection ....	169
Diagram Properties .....	170
Opening and Viewing Diagrams .....	170
Finding an Object Symbol in the Diagram .....	172
Specifying Diagrams as Related Diagrams .....	172
Deleting a Diagram .....	173
Printing Diagrams .....	173
Print Diagram Options .....	174
Page Setup Options .....	175
Converting a Diagram to a Package .....	177
Moving a Diagram to a Package .....	178
Moving Entities Between Packages in a CDM .....	180
<b>Dependency Matrices .....</b>	<b>180</b>
Specifying Advanced Dependencies .....	182
Working with Dependency Matrices .....	183
<b>Symbols .....</b>	<b>185</b>
Manipulating Symbols .....	186
Manipulating Link Symbols .....	187
Aligning, Ordering, Grouping, and Hiding Symbols ....	188
Auto-Layout .....	190
Aligning Selected Symbols .....	191
Showing and Hiding Symbols .....	192
Symbol Format Properties .....	193
Controlling the Format of Custom Symbols .....	197
Finding Symbols from the Browser, Object Lists, and the Result List .....	198

Using Composite View to Display Sub-Objects within a Symbol .....	198
Creating Graphical Synonyms for Object Symbols .....	199
Browsing for Images .....	200
Searching for Images .....	202
Decorative Symbols .....	203
Creating a Graphical Link Between Any Two Symbols .....	204
Text Editor Tools .....	204
<b>Display Preferences .....</b>	<b>206</b>
General Settings Display Preferences .....	208
Content Display Preferences .....	210
Format Display Preferences .....	212
Customizing Content Display Preferences .....	213
Configuring the Display of Attributes .....	215
Configuring the Display of Collections .....	216
Configuring the Display of Exclusive Choices ...	217
<b>Importing and Exporting Model Graphics .....</b>	<b>218</b>
 <b>CHAPTER 6: The Free Model (FEM) .....</b>	<b>219</b>
<b>Sketching Objects with the Free Model .....</b>	<b>219</b>
<b>Creating New Types of Model with the Free Model .....</b>	<b>220</b>
 <b>CHAPTER 7: Comparing and Merging Models .....</b>	<b>223</b>
<b>Comparing Models .....</b>	<b>223</b>
Reviewing Differences when Comparing Models .....	223
<b>Merging Models .....</b>	<b>226</b>
Selecting Merge Actions .....	226
<b>Excluding Objects and Properties from a Compare or         Merge .....</b>	<b>230</b>
<b>Filtering Objects and Changes During a Compare or         Merge .....</b>	<b>232</b>
<b>Repairing or Breaking Links Between Objects .....</b>	<b>232</b>

<b>Previewing, Printing, and Saving Comparison Results</b>	<b>233</b>
<b>CHAPTER 8: The PowerDesigner Plugin for Eclipse</b>	
<b>CHAPTER 8: The PowerDesigner Plugin for Eclipse</b>	<b>237</b>
<b>Activating the PowerDesigner Perspective</b>	<b>237</b>
Manually Activating PowerDesigner Toolbars	239
Setting PowerDesigner Eclipse Preferences	239
<b>Creating a Modeling Project in Eclipse</b>	<b>240</b>
<b>Creating a Model in Eclipse</b>	<b>240</b>
<b>Importing an Existing Model into Eclipse</b>	<b>241</b>
<b>Generating an Eclipse Java Project from an OOM</b>	<b>241</b>
<b>Synchronizing an OOM with Its Java Source</b>	<b>242</b>
Example: Modifying Attributes in a Synchronized Model	244
Deactivating Synchronization	247
Navigating Between an OOM and Its Java Source Code	247
<b>CHAPTER 9: Customizing Your Modeling Environment</b>	
<b>CHAPTER 9: Customizing Your Modeling Environment</b>	<b>249</b>
<b>User Profiles</b>	<b>249</b>
Applying a User Profile	250
Creating a User Profile	251
Updating a User Profile	252
Copying Preferences from a Model	253
Reviewing and Editing User Profiles in the Resource Editor	253
Making Custom User Profiles Available in the PowerDesigner Installer	254
<b>General Options</b>	<b>255</b>
Dialog Box Options	256
Text Editors	258
Environment Variables	259

Named Paths .....	259
Interface Fonts .....	262
Add-Ins .....	262
Model Creation Options .....	264
Repository Options .....	265
<b>Organizing Views .....</b>	<b>268</b>
<b>Organizing Toolbars .....</b>	<b>269</b>
<b>Customizing Menus, Toolbars, and Toolboxes .....</b>	<b>270</b>
<b>PowerDesigner Resource Files .....</b>	<b>272</b>
Sharing and Embedding Resource Files .....	274
Creating and Copying Resource Files .....	274
Specifying Directories to Search for Resource Files .....	274
Extension Files .....	275
Creating an Extension File .....	276
Attaching Extensions to a Model .....	277
Exporting an Embedded Extension File for Sharing .....	278
Reconnecting to Missing Extensions .....	279
<b>Shortcut Keys .....</b>	<b>279</b>

## **PART II: Storing, Sharing, and Reporting on Models** .....**285**

### **CHAPTER 10: The Repository .....****287**

<b>Browsing the Repository .....</b>	<b>287</b>
Repository Folders .....	288
Repository Document Properties .....	289
Repository Root Properties .....	290
<b>Checking Documents into the Repository .....</b>	<b>291</b>
Checking In a Project .....	292
Checking In a Model, Resource File, or Other Document .....	293
Checking In Multiple Documents .....	295
Check-In Parameters .....	297

Resolving Conflicts During Check In .....	299
Checking In Packages .....	301
Checking In External Application Documents .....	301
Duplicating Models in the Repository .....	301
Undoing a Check In .....	302
Temporary Protection for Updates to Repository Documents .....	302
Moving a Document in the Repository .....	303
<b>Change Lists .....</b>	<b>303</b>
Creating, Building, and Submitting a Change List .....	305
Reviewing a Change List .....	306
Approving, Returning, or Rejecting a Change List .....	307
Consulting the List of Change Lists .....	309
Change List Properties .....	310
<b>Checking Documents Out of the Repository .....</b>	<b>311</b>
Checking out a Project .....	312
Checking Out a Document .....	312
Checking Out Multiple Documents .....	313
Checkout Parameters .....	315
Resolving Conflicts During Check Out .....	316
Checking Out Packages .....	317
<b>Document Versions .....</b>	<b>318</b>
Freezing and Unfreezing Document Versions .....	320
Locking and Unlocking Document Versions .....	321
<b>Grouping Document Versions in a Configuration .....</b>	<b>322</b>
Creating a Configuration from a Project or Folder .....	325
Checking Out a Configuration .....	325
<b>Branching Version Trees .....</b>	<b>325</b>
Controlling Branch Permissions .....	327
Integrating Changes from One Branch to Another .....	328
Deleting a Branch .....	330
<b>Impact and Lineage Analysis in the Repository .....</b>	<b>331</b>
<b>Finding Objects in the Repository .....</b>	<b>332</b>
<b>Comparing Models in the Repository .....</b>	<b>333</b>



<b>Deleting Documents, Document Versions, and Folders .....</b>	<b>334</b>
 <b>CHAPTER 11: The PowerDesigner Portal .....</b>	<b>337</b>
<b>Logging into the PowerDesigner Portal .....</b>	<b>337</b>
<b>PowerDesigner Portal Repository Explorer .....</b>	<b>338</b>
Repository Document and Object Properties .....	339
Adding User or Group Permissions for a Repository Item .....	340
Subscribing to Change Notifications .....	340
Comparing Model and Object Versions .....	341
Impact and Lineage Analysis in the PowerDesigner Portal .....	341
Editing Object Comments and Descriptions .....	342
<b>PowerDesigner Portal Search .....</b>	<b>344</b>
Advanced PowerDesigner Portal Search .....	345
<b>PowerDesigner Portal Users and Groups .....</b>	<b>349</b>
Creating a Repository User .....	349
Creating a Repository Group .....	350
Granting Rights to Users and Groups .....	350
Adding a Member to a Group from the Member's Property Sheet .....	351
Adding a Member to a Group from the Group's Property Sheet .....	351
Deactivating a User .....	352
Deleting a Group .....	352
<b>PowerDesigner Portal Settings .....</b>	<b>353</b>
PowerDesigner Portal Client Settings .....	353
Creating a New Color Theme .....	354
PowerDesigner Portal Server Settings .....	355
Importing an LDAPS Certificate for the PowerDesigner Portal .....	360
PowerDesigner Portal Server Status Settings .....	360
<b>Troubleshooting the PowerDesigner Portal .....</b>	<b>361</b>

Unicode Encoding with Sybase SQL Anywhere V10 .....	361
Increasing Tomcat Memory .....	361
<b>CHAPTER 12: Reports .....</b>	<b>363</b>
<b>Creating a Model Report .....</b>	<b>363</b>
Creating a Report with the Report Wizard .....	364
Creating a Report from a Template or an Empty Report .....	369
<b>Creating a List Report .....</b>	<b>370</b>
List Report Properties .....	373
Creating Result Sets .....	374
Generating a List Report .....	375
Importing and Exporting List Report Files .....	375
<b>Creating a MultiModel Report .....</b>	<b>376</b>
<b>The Report Editor .....</b>	<b>377</b>
Adding Items to a Report .....	379
Book Report Items .....	381
List and Card Report Items .....	382
Text Property and Free Text Report Items .....	383
Diagram Report Items .....	384
Chart Report Items .....	384
Example: Creating Charts for Hardware Servers .....	386
Dependency Matrix Report Items .....	390
Specifying Global Styles and Local Formats for Report Items .....	391
Selecting Objects to Display for a Report Item .....	393
Modifying or Suppressing the Titles of Report Items .....	394
Modifying Report Section Headers and Footers .....	395
Referencing Object and Model Properties .....	396
Previewing a Report or Report Item .....	397
<b>The Legacy Report Editor .....</b>	<b>398</b>

Adding Items to a Report (Legacy Reports) .....	399
Modifying Items in the Report Items Pane (Legacy Reports) .....	401
Modifying the Title of an Item (Legacy Reports) .....	402
Modifying the Collection of an Item (Legacy Reports) .....	402
Selecting Objects to Display in the Report .....	403
Specifying Default Fonts for Report Items (Legacy Reports) .....	404
Formatting Textual Report Items (Legacy Reports) ...	405
Editing Textual Report Items (Legacy Reports) .....	408
Formatting Graphical Report Items (Legacy Reports) .....	409
Controlling the Layout of List Report Items (Legacy Reports) .....	409
Controlling the Layout of Card Report Items (Legacy Reports) .....	410
Suppressing the Titles of Report Items (Legacy Reports) .....	411
Modifying Report Section Headers and Footers (Legacy Reports) .....	412
Previewing Your Report (Legacy Reports) .....	413
Upgrading Legacy Reports for Use with the Graphical Editor .....	414
<b>Generating a Model Report .....</b>	<b>415</b>
<b>Report Templates .....</b>	<b>417</b>
Creating a Template from the List of Report Templates .....	417
Saving a Report or Report Section as a Report Template .....	418
Modifying and Saving a Template .....	418
<b>Report Properties .....</b>	<b>418</b>
Valid Codepage .....	423
RTF Presentation Templates .....	424
HTML Presentation Templates .....	424

## **PART III: Linking and Synchronizing Models .....427**

### **CHAPTER 13: Getting Started with Linking and Syncing .....429**

**Creating Links Between Models .....430**

**Viewing Links Between Models .....431**

**Creating Traceability Links .....431**

    Creating Traceability Links Between Objects from  
        Different Models .....432

    Creating New Types of Traceability Links .....432

    Grouping Traceability Links by Object or Link Type ....433

### **CHAPTER 14: Generating Models and Model Objects .....435**

**Generating Models .....435**

    Model Generation Options .....436

    Applying Pre- and Post- Generation Transformations  
        .....442

    Customizing Data Type Mappings .....443

    Customizing XSM Generation for Individual Objects  
        .....445

**Generating Model Objects .....447**

    Defining Simple Object Generations .....448

    Defining Advanced Object Generations .....449

    Managing Object Generation Commands .....450

**The Generation Links Viewer .....450**

**Using Impact Analysis with Generated Models .....453**

### **CHAPTER 15: Shortcuts and Replicas .....455**

**Creating Shortcuts .....457**

    Shortcut Properties .....459

    Viewing Shortcuts .....461

<b>Creating Replicas .....</b>	<b>463</b>
Desynchronizing Replica Properties .....	464
Viewing Replicas .....	465
Comparing and Merging Replicas .....	467
<b>Synchronizing Shortcuts and Replicas .....</b>	<b>467</b>
<b>Viewing Shortcut and Replica Dependencies .....</b>	<b>468</b>
<b>Working with Target Models .....</b>	<b>469</b>
<b>Generating Shortcuts and Replicas .....</b>	<b>470</b>
 <b>CHAPTER 16: Object Mappings .....</b>	 <b>473</b>
<b>Creating a Data Source .....</b>	<b>476</b>
<b>The Mapping Editor .....</b>	<b>477</b>
Model-to-Model Mappings .....	479
Object to Relational (O/R) Mappings .....	481
Operational to Warehouse Data Mappings .....	483
XML Import Mappings .....	484
Model-to-Model Generation Mappings .....	487
Mapping Editor Tools .....	489
Creating Reverse Mappings .....	490
<b>Creating Mappings from an Object's Property Sheet .....</b>	<b>491</b>
<b>Object and Sub-Object Mapping Properties .....</b>	<b>493</b>
<b>Metamodel Mapping Properties .....</b>	<b>495</b>
<b>Metamodel Object Properties .....</b>	<b>497</b>
 <b>CHAPTER 17: Impact and Lineage Analysis .....</b>	 <b>499</b>
<b>Reviewing and Modifying an Analysis .....</b>	<b>502</b>
Viewing the Preview as a List .....	505
Controlling the Display of Object Collections .....	506
<b>Reviewing and Modifying an IAM Model .....</b>	<b>507</b>
IAM Model Properties .....	509
Setting IAM Display Preferences .....	509
Comparing Two IAM Models .....	510
<b>Printing an Analysis .....</b>	<b>510</b>
<b>IAM Custom Checks .....</b>	<b>510</b>

<b>Obtaining Cross-Model Dependencies Without a Repository Connection .....</b>	<b>511</b>
<b>Analysis Rule Sets .....</b>	<b>512</b>
Creating an Analysis Rule Set .....	515
Creating a User-Defined Action .....	515
Checking Rule Sets into the Repository .....	517
<b>Repository Rule Set Limitations .....</b>	<b>518</b>
 <b>PART IV: Administering PowerDesigner .....</b>	<b>519</b>
 <b>CHAPTER 18: Controlling Repository Access .....</b>	<b>521</b>
<b>Connecting to an LDAP Server for User Authentication .....</b>	<b>524</b>
<b>Connecting to an SMTP Server for Notifications .....</b>	<b>527</b>
<b>Defining a Password Policy .....</b>	<b>528</b>
<b>Creating Repository Users .....</b>	<b>529</b>
<b>Creating Repository Users Managed by LDAP .....</b>	<b>530</b>
<b>Creating Repository Groups .....</b>	<b>531</b>
Adding Users and Groups to a Group .....	532
Deleting a Group .....	533
<b>Granting Rights to Users and Groups .....</b>	<b>533</b>
<b>Granting Access Permissions on Repository Items .....</b>	<b>534</b>
<b>Unblocking Blocked Users .....</b>	<b>536</b>
<b>Deactivating Users .....</b>	<b>536</b>
<b>Auditing Repository Activities .....</b>	<b>536</b>
<b>Querying the Repository Using SQL .....</b>	<b>538</b>
<b>Obtaining Emergency Access to the Repository .....</b>	<b>538</b>
 <b>CHAPTER 19: Deploying an Enterprise Glossary and Library .....</b>	<b>541</b>
<b>Deploying an Enterprise Glossary .....</b>	<b>541</b>
Creating Terms, Synonyms, and Related Terms .....	541
Importing Terms from a Model .....	544

Importing Terms from an Excel or CSV File .....	545
Organizing Terms in Categories .....	545
Adding Other Views and Objects to, and Extending the Glossary .....	546
Glossary Terms Lists .....	546
Checking the Glossary .....	547
Deploying the Glossary .....	548
Glossary Model Properties .....	548
Glossary Model Options .....	549
<b>Deploying an Enterprise Library .....</b>	<b>549</b>
Sharing Resource Files via the Library .....	551
<b>Controlling Library and Glossary Write Permissions ....</b>	<b>551</b>
 <b>CHAPTER 20: Customizing the PowerDesigner</b>	
<b>Interface .....</b>	<b>553</b>
<b>Customizing the New Model Dialog .....</b>	<b>553</b>
Selecting a Model Category Set to Display in the New Model Dialog .....	554
Creating a Model Category Set .....	555
Adding a Model Template to a Model Category Set .....	557
Adding a Model from Template to a Model Category Set .....	558
Pushing Model Category Sets to Users .....	559
<b>Using Profiles to Control the PowerDesigner Interface</b> .....	<b>560</b>
Controlling the Availability of Models, Objects, and Properties .....	560
Example Permission Profiles .....	564
Controlling Defaults for Menus, Toolbars, and Toolboxes .....	565
Controlling Defaults for Options and Preferences .....	566
Applying Profiles to Users and Groups .....	566

**CHAPTER 21: Securing Your PowerDesigner Environment .....569**

**Encrypting PowerDesigner Network Communications .....570**

        Enabling SSL for the PowerDesigner Portal ..... 571

        Controlling SSL Encryption for the PowerDesigner Portal .....572

**Password and Data Encryption .....573**

Index ..... 575



## PART I

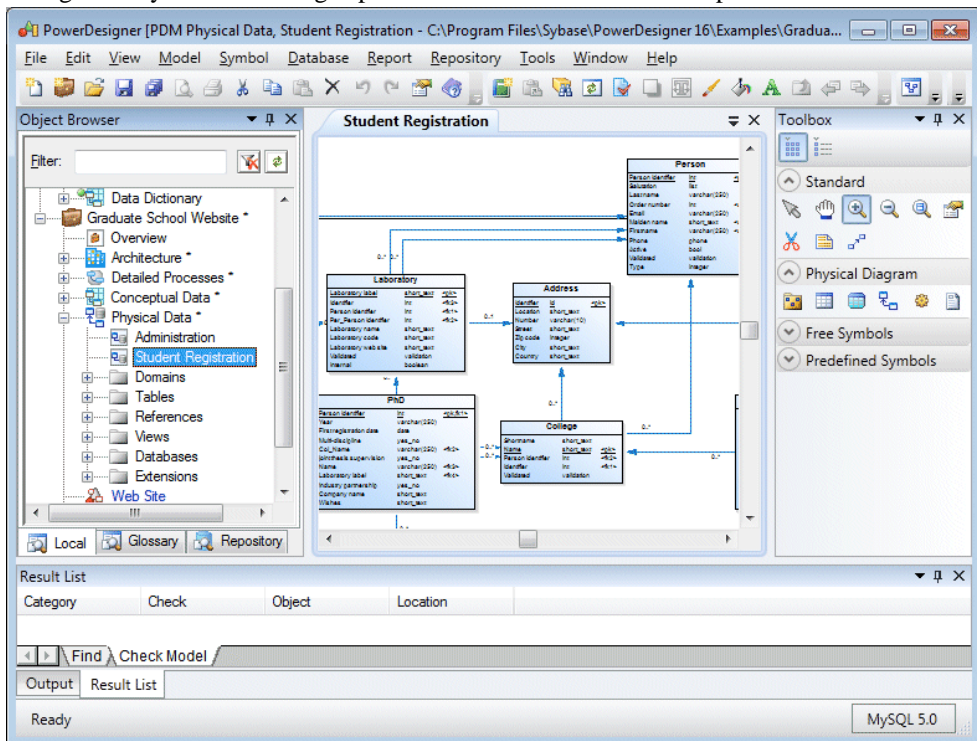
# Modeling with PowerDesigner

The chapters in this part introduce you to the SAP® Sybase® PowerDesigner® interface and the core concepts available for all kinds of models.



# Getting Started with PowerDesigner

SAP® Sybase® PowerDesigner® is a graphical enterprise modeling solution supporting standard methodologies and notations and providing automated code reverse engineering and generation through customizable templates. PowerDesigner provides powerful reporting capabilities, is highly extensible, and offers a scalable enterprise repository solution with strong security and versioning capabilities to aid multi-user development.



The default PowerDesigner window displays the following views:

- The *Browser* - displays your models and the objects belonging to them (see *Chapter 2, The Browser* on page 35). The Browser also allows you to view a PowerDesigner repository (see *Chapter 10, The Repository* on page 287) and may display an enterprise library of shared models (see *The Library* on page 39) and an enterprise glossary (see *The Glossary* on page 36).
- The *Canvas* - is a tabbed view that displays your open diagrams (see *Diagrams* on page 169) and report outlines (see *Chapter 12, Reports* on page 363).

## CHAPTER 1: Getting Started with PowerDesigner

- The *Toolbox* - displays graphical tools to help you quickly build model diagrams. The available tools depend on the type of the currently selected diagram (see *Creating Objects from the Toolbox* on page 89).
- The *Result List* - displays the results of a search or a model check.
- The *Output* view - (grouped, above, with the Result List) displays the progress of any PowerDesigner process, such as checking a model or generating or reverse engineering a database.

For information about moving, docking, grouping, splitting, and hiding these views, see *Organizing Views* on page 268.

In addition, you will work extensively with:

- *Object property sheets* - which permit you to view and edit the object's properties. You can access an object's property sheet by double-clicking its symbol or browser entry, or right-clicking it and selecting **Properties** (see *Object Properties* on page 98).
- *Object lists* - provide a spreadsheet-like presentation of, and allow for the easy creation and modification of objects in your model. Lists are available under the **Model** menu and on the property sheets of composite objects such as entities, tables, and classes, which contain sub-objects (see *Object Lists* on page 108).

## The Welcome Page

---

The Welcome page gives you one-click access to all your recent projects, workspaces, and models, as well as providing a direct link to the New Model and New Project dialogs and a

range of help materials. To suppress this page, select the **Do not show this page again** check box. You can redisplay it at any time by selecting **View > Welcome Page**.



By default, the following items are available:

- **Getting Started**
  - **Create Model** - Opens the New Model dialog to let you create a model (see *Creating a Model* on page 9).
  - **Create Project** - Opens the New Project dialog to let you create a project (see *Creating a Project* on page 48).
  - **Open Model or Project** - Opens a standard Open dialog to let you browse for a model or project to open.
  - **Examples** - Opens the PowerDesigner Examples folder to let you select an example model to open.
  - **Help** - Opens the PowerDesigner online help.
  - **What's New in PowerDesigner** - Opens the PowerDesigner New Features Summary.




- **Documentation and Videos** - Opens a Web page listing the available PowerDesigner documentation and videos.
- **PowerDesigner Web Site** - Opens the PowerDesigner page on the Sybase® website.
- **PowerDesigner Newsgroup** - Opens the PowerDesigner newsgroup page on the Sybase website.
- **Recent projects and workspaces** - Lists your most recent projects and workspaces. Click a project or workspace to open it.
- **Recent models** - Lists your most recent models. Click a model to open it.








## PowerDesigner Models



---

PowerDesigner enables you to closely integrate the design and maintenance of your application's core data layers with your project requirements, business processes, OO code, XML vocabularies, and database replication information and to align these with your overall enterprise architecture and corporate standards. By providing you with a comprehensive set of models at all levels of abstraction, PowerDesigner helps you broaden the reach of your iterative design process to all aspects of your system architecture, from conception to deployment, and beyond.

The following types of PowerDesigner models are available:

Icon	Description
	<p>A <i>requirements model (RQM)</i> helps you analyze any kind of written requirements and link them with users and groups who will implement them and with design objects in other models. You can use an RQM to represent any structured document (e.g. functional specification, test plan, business goals, etc.) and import and export hierarchies of requirements as MS Word documents.</p> <p>File extension: .rqm Backup: .rqb</p>
	<p>An <i>enterprise architecture model (EAM)</i> helps you analyze and document your organization and its business functions, along with the applications and systems that support them and the physical architecture on which they are implemented.</p> <p>File extension: .eam Backup: .eab</p>
	<p>A <i>business process model (BPM)</i> helps you identify, describe, and decompose business processes. You can analyze your system at various levels of detail, and focus alternatively on control flow (the sequence of execution) or data flow (the exchange of data). SAP® Sybase® PowerDesigner® supports Analysis, SOA, DFD, SAP® Solution Manager, BPMN (including for SAP NetWeaver®), and BPEL process languages, and process simulation through SIMUL8.</p> <p>File extension: .bpm Backup: .bpb</p>

Icon	Description
	<p>A <i>conceptual data model (CDM)</i> helps you analyze the conceptual structure of an information system, to identify the principal entities to be represented, their attributes, and the relationships between them. A CDM is more abstract than a logical (LDM) or physical (PDM) data model.</p> <p>File extension: <code>.cdm</code> Backup: <code>.cdb</code></p>
	<p>A <i>logical data model (LDM)</i> helps you analyze the structure of an information system, independent of any specific physical database implementation. An LDM has migrated entity identifiers and is less abstract than a conceptual data model (CDM), but does not allow you to model views, indexes and other elements that are available in the more concrete physical data model (PDM).</p> <p>File extension: <code>.ldm</code> Backup: <code>.ldb</code></p>
	<p>A <i>physical data model (PDM)</i> helps you to analyze the tables, views, and other objects in a database, including multidimensional objects necessary for data warehousing. A PDM is more concrete than a conceptual (CDM) or logical (LDM) data model. You can model, reverse-engineer, and generate for all the most popular DBMSs.</p> <p>File extension: <code>.pdm</code> Backup: <code>.pdb</code></p>
	<p>A <i>data movement model (DMM)</i> provides a global view of the movement of information in your organization. You can analyze and document where your data originates, where it moves to, and how it is transformed on the way, including replications and ETL.</p> <p>File extension: <code>.dmm</code> Backup: <code>.dmb</code></p>
	<p>An <i>object-oriented model (OOM)</i> helps you analyze an information system through use cases, structural and behavioral analyses, and in terms of deployment, using the Unified Modeling Language (UML). You can model, reverse-engineer, and generate for Java, .NET and other languages.</p> <p>File extension: <code>.oom</code> Backup: <code>.obb</code></p>
	<p>An <i>XML model (XSM)</i> helps you analyze an XML Schema Definition (.XSD), Document Type Definition (.DTD) or XML-Data Reduced (.XDR) file. You can model, reverse-engineer, and generate each of these file formats.</p> <p>File extension: <code>.xsm</code> Backup: <code>.xsb</code></p>
	<p>A <i>free model (FEM)</i> provides a context-free environment for modeling any kind of objects or systems. You can use it to sketch simple visualizations or create entirely new forms of model by defining your own concepts and graphical symbols through an extension file. See <i>Chapter 6, The Free Model (FEM)</i> on page 219.</p> <p>File extension: <code>.fem</code> Backup: <code>.feb</code></p>

Icon	Description
	<p>The <i>glossary model (GLM)</i> helps you capture and organize the terminology to be used for naming your model objects. An administrator deploys the glossary, and users enable it in their models to provide autocompletion for object names and model checks to ensure compliance. The glossary appears in the Browser <b>Glossary</b> tab and updates are pushed to users each time they connect to the repository, or on demand. Only one glossary is permitted per repository. See <i>The Glossary</i> on page 36 and <i>Deploying an Enterprise Glossary</i> on page 541.</p> <p>File extension: .glm Backup: .geb</p>
	<p>A <i>multimodel report (MMR)</i> is a PowerDesigner report that can document any number of models together and show the links between them. To create such a report, you must have at least one model open in the workspace, and you can add additional models at any time. See <i>Chapter 12, Reports</i> on page 363.</p> <p>File extension: .mmr Backup: .bmr</p>

PowerDesigner does not impose any particular software engineering methodology or process. Each company can implement its own workflow, defining responsibilities and roles, describing what tools to use, what validations are required, and what documents to produce at each step in the process.

A development team will comprise multiple user roles, each of whom will use different PowerDesigner models:

- *Business Analysts*—define the architecture of the organization, the business requirements and high-level business flows, and may use:
  - *EAM* - for providing a big picture of the organization, defining its structure, and analyzing high-level functions, processes, and flows. These architectural objects can be attached to implementation objects in any of the other models.
  - *RQM* - for defining business requirements to be refined into technical requirements by Analysts and Designers.
  - *BPM* - to define the high-level business process flows in existing and new systems, and to simulate business processes to improve productivity.
- *Data Analysts and Designers* - map technical requirements to business requirements, and may use:
  - *OOM* - to define use cases and map them to requirements.
  - *BPM* - to write functional specifications and define more precisely the nature and details of each process, the application and its data structure.
  - *CDM* - to provide a clear view of business data across all systems.
- *Database Administrators* use the well-defined data structure to optimize, denormalize, and create the database, and may use:
  - *PDM* - to represent a database running on a server with complete information on the structure of the physical objects, such as tables, columns, references, triggers, stored procedures, views, and indexes, and to generate to and reverse-engineer from scripts or



a live database connection. By maintaining a PDM and a CDM, you can ensure that your analysis and design efforts are reflected exactly in your actual systems.

- **LDM** - which can act as a bridge between a CDM and a PDM, allowing you to resolve many-to-many and super/sub-type relationships, de-normalize your data structures, and define indexes, without specifying a particular RDBMS.
- **DMM** - to represent the replication of information from a source database to one or several remote databases.
- **Developers** model the application, defining object structures and behaviors, and Object/Relational mappings, and may use:
  - **RQM** - to write technical specifications.
  - **OOM** - to represent objects and their interactions in UML, and to generate and reverse engineer OO code. Close integration with your BPM, CDM, and PDM can greatly simplify the maintenance and development of your system.
  - **XSM** - to graphically model the complex structure of an XML file and to generate and reverse-engineer DTDs, and XSDs and link them to your PDM and OOM.
- **Testers** will use the RQM, CDM, and other models, together with the design documents to understand how the application should work and how it is developed.

## Creating a Model

---

You create a new model by selecting **File > New Model**.

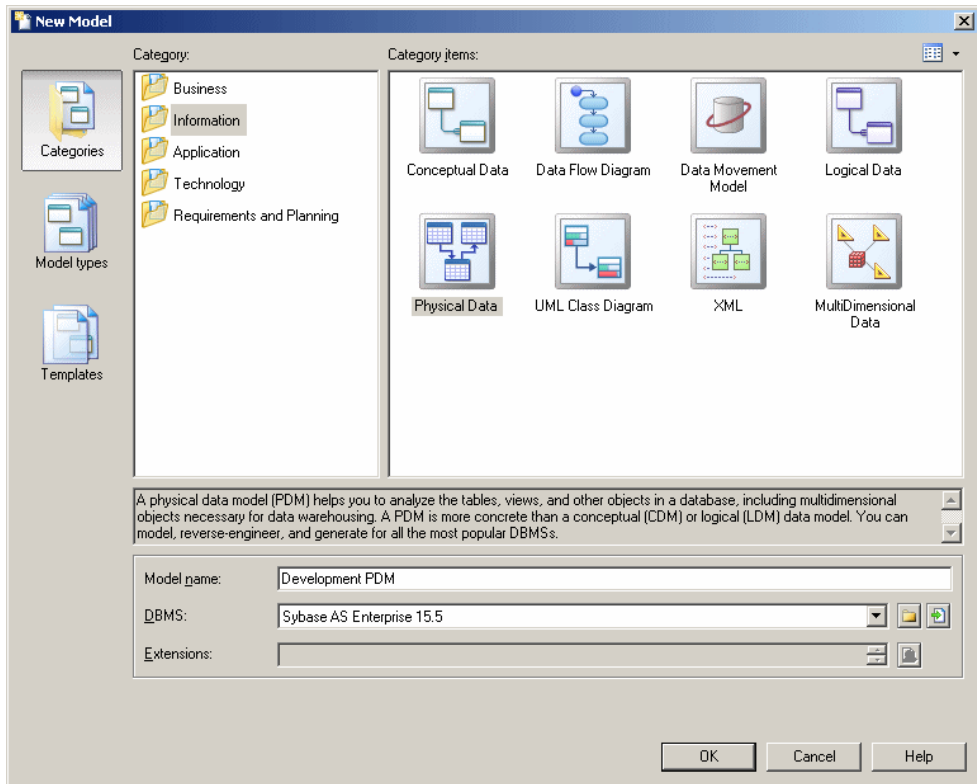
---

**Note:** A project can provide a convenient environment for working with multiple interconnected models and other files (see *Chapter 3, Projects and Frameworks* on page 47).

---

The New Model dialog is highly configurable, and your administrator may hide options that are not relevant for your work or provide templates or predefined models to guide you through model creation. When you open the dialog, one or more of the following buttons will be available on the left hand side:

- **Categories** - which provides a set of predefined models and diagrams sorted in a configurable category structure.
- **Model types** - which provides the classic list of PowerDesigner model types and diagrams.
- **Template files** - which provides a set of model templates sorted by model type.



1. Select **File > New Model** to open the New Model dialog.
2. Click a button, and then select a category or model type ( as appropriate ) in the left-hand pane.  
For a list of PowerDesigner model types, see *PowerDesigner Models* on page 6.
3. Select an item in the right-hand pane. Depending on how your New Model dialog is configured, these items may be first diagrams or templates on which to base the creation of your model.  
Use the **Views** tool on the upper right hand side of the dialog to control the display of the items.
4. Enter a model name. The code of the model, which is used for script or code generation, is derived from this name using the model naming conventions.
5. [BPM, PDM, OOM, and XSM] Select a target *resource file* , which customizes PowerDesigner's default modifying environment with target-specific properties, objects, and generation templates.

By default, PowerDesigner creates a link in the model to the specified file. To copy the contents of the resource and save it in your model file, click the **Embed Resource in Model** button to the right of this field. Embedding a file in this way enables you to make

changes specific to your model without affecting any other models that reference the shared resource.

6. [optional] Click the **Select Extensions** button and attach one or more extensions to your model.
7. Click **OK** to create and open the model .

---

**Note:** Sample models are available in the Example Directory.

---

**Note:** For information about creating new models in the PowerDesigner Eclipse plugin, see *Creating a Model in Eclipse* on page 240.

---

## Attaching Extensions At Model Creation Time

The Select Extensions dialog allows you to attach extensions to your model at creation time. Extensions may contain additional types of objects or extensions to standard objects, along with additional generation targets and other extensions to PowerDesigner's standard capabilities.

1. Click the **Select Extensions** tool in the New Model dialog.
2. Review the different sorts of extensions available by clicking the sub-tabs and select one or more to attach to your model.

By default, PowerDesigner creates a link in the model to the specified file. To copy the contents of the extension file and save it in your model file, click the **Embed Resource in Model** button in the toolbar. Embedding a file in this way enables you to make changes specific to your model without affecting any other models that reference the shared resource.

3. Click **OK** to close the dialog and return to the New Model dialog.

---

**Note:** You can attach extensions to your model after creation by selecting **Model > Extensions** and clicking the **Attach an Extension** tool.

---

## Model Templates

A model template is a shell model that contains a set of model options, display preferences, extensions, and/or objects, which you can reuse in multiple models of the same type. For example, a BPM model template can be used to create other BPMs, but not an OOM or PDM. Model templates are stored in the model templates directory, which is, by default, the PowerDesigner installation directory.

You can make any model available as a model template by saving it to the model templates directory. Alternatively, you can manage your model templates from the New Model dialog (select **File > New Model**, or click the New Model tool, and then select the Templates button).



---

**Note:** The New Model dialog is highly customizable and its display is controlled by the Model Creation general options. If the **Enable model template files** option is deselected or if no valid template directory is selected then the Templates button will not be available. For information about these options, see *Model Creation Options* on page 264.

---

## CHAPTER 1: Getting Started with PowerDesigner

The New Model dialog lists the model templates that are available, sorted by model type, and provides the following tools:

Tool	Description
	Copy Model as Model Template – allows you to select one or more models as model templates, and copies them to the model templates folder.
	Change Model Templates Folder – allows you to select a folder for use as the model templates folder.

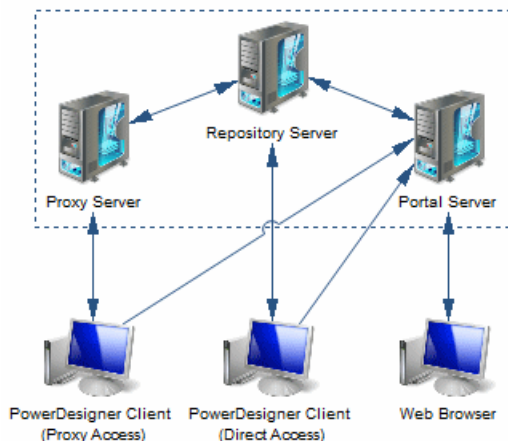
For information about using the New Model dialog, see *Creating a Model* on page 9.

## Accessing the Repository

You can access the repository directly, via the repository proxy, or through a web browser (via the PowerDesigner Portal). Your administrator will tell you which methods are available to you.

The following diagram shows the various ways that users can connect to the repository:

- Proxy Access [if the repository proxy is installed] - see *Setting up PowerDesigner for Access Via the Proxy* on page 14
- Direct Access – see *Setting up PowerDesigner for Direct Access* on page 13
- Web Browser [if the PowerDesigner Portal is installed] – see *Chapter 11, The PowerDesigner Portal* on page 337



**Note:** Before you can access the repository, an administrator must install and configure it and provide you with a user name and password. For information about installing the repository, see *Installation Guide*.

## Setting up PowerDesigner for Direct Access

To create a direct repository definition, you must have a login name and password for the repository AND a user name and password for the database where it is stored. You may also need to install a database client or driver in order to connect to the repository database. Your repository administrator will supply you with this information.

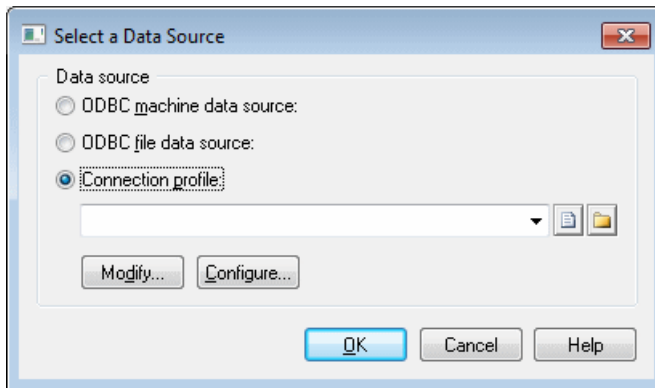
If your administrator has installed the repository proxy, see *Setting up PowerDesigner for Access Via the Proxy* on page 14.

---

**Note:** For information about installing the repository and making the first connection to it as an administrator, see the *Installation Guide*.

---

1. Select **Repository > Repository Definitions** to open the List of Repository Definitions.
2. Click the **Add a Row** tool and type a name in the **Repository Name** column to identify the definition for future use.
3. Type your user name in the **Repository User** column. If you are an administrator and are creating the first repository definition that will be used to initialize the repository (see *Chapter 18, Controlling Repository Access* on page 521), you must use the ADMIN repository user name.
4. Press F4 or click the Ellipsis button in the **Data Source Name** column to open the Select a Data Source dialog:

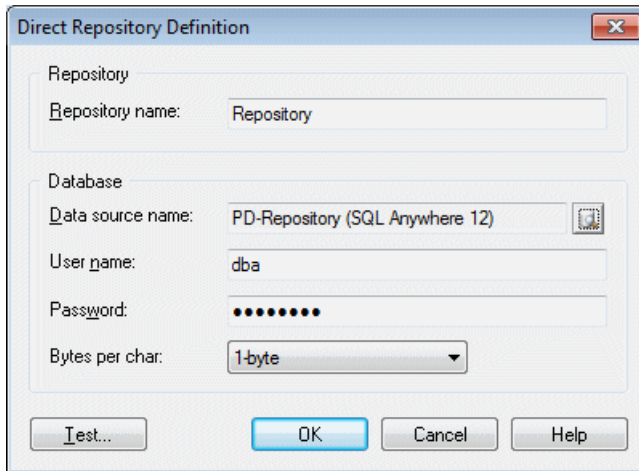


5. Select one of the following options:
  - ODBC machine data source
  - ODBC file data source
  - Connection profile (for native or JDBC connections)

Use the tools to the right of the data source field to browse to a new connection profile file or directory, and the **Modify** and **Configure** buttons to change your existing data source connection.

For detailed information about creating, configuring, and using connection profiles, see *Configuring Connection Profiles* on page 21.

6. Select a data source and click **OK** to return to the List of Repository Definitions, where it will be displayed in the **Data Source Name** column.
7. Click **Apply** to apply your changes, and then click the **Properties** tool to open the Direct Repository Definition dialog:



This window has two group boxes:

- **Repository** – specifies the name of the repository definition.
- **Database** – specifies the name of the data source that hosts the repository database, and the user name and password that you will use to connect to it. The user name and password are optional, but if you do not specify them here you will need to enter them each time you connect to the repository.

For non-Oracle unicode or multi-byte character set databases, you should also specify the bytes per character used by the database:

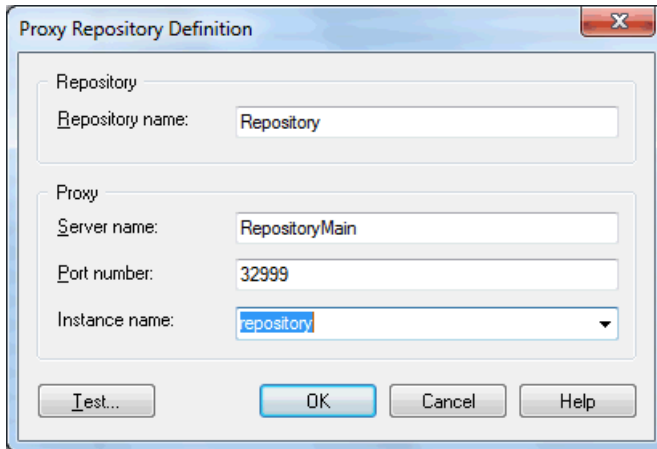
- 1-byte - [default] For SBCS (Single-Byte Character Set)
  - 2-byte - For DBCS (Double-Byte Character Set)
  - 3-byte - For Unicode or MBCS (Multi-Byte Character Set)
8. Test the definition by clicking the **Test** button. A message box will state whether your connection succeeds or fails.
  9. Click **OK** to return to the List of Repository Definitions.

### **Setting up PowerDesigner for Access Via the Proxy**

To create a proxy repository definition, you must have a login name and password for the repository and know the server on which the proxy is installed. Your repository administrator will supply you with this information.

If you are connecting directly, see *Setting up PowerDesigner for Direct Access* on page 13.

1. Select **Repository > Repository Definitions** to open the List of Repository Definitions.
2. Click the **Add a Row** tool and type a name in the **Repository Name** column to identify the definition for future use.
3. Type your user name in the **Repository User** column, and select **Proxy** in the **Connection Type** column (you may need to widen the window to see this column).
4. Click **Apply** to apply your changes, and then click the **Properties** tool to open the Proxy Repository Definition window:



This window has two group boxes:

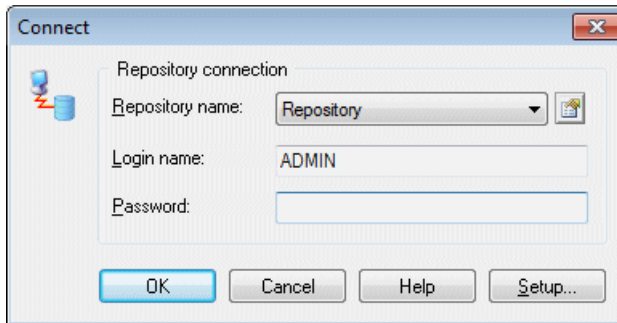
- **Repository** – specifies the name of the repository definition.
  - **Proxy** – specifies the name of the server where the repository proxy is installed, the port number, and the name of the repository instance that you will connect to.
5. Test the definition by clicking the **Test** button. A message box will state whether your connection succeeds or fails.
  6. Click **OK** to return to the List of Repository Definitions.

## **Connecting to a Repository**

Before you can connect to a repository, an administrator must install and configure it and provide you with a user name and password, and you must have created a repository definition.

For information about creating a repository definition, see *Accessing the Repository* on page 12.

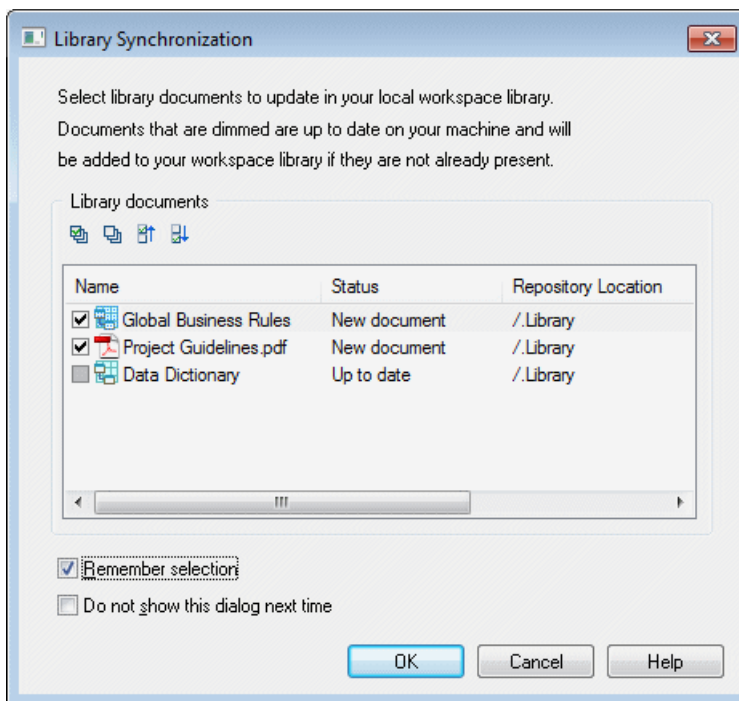
1. Select **Repository > Connect** (or double-click the root in the Browser **Repository** tab) to open the Connect dialog.



2. Select a repository to connect to and enter your login name and password. To review the repository definition, click the **Properties** tool.
3. Click **OK** to connect.

The contents of the repository are displayed in the **Repository** tab of the Browser. The root node displays the name of the repository and your login.

If any of the local copies of Library files (see *The Library* on page 39) are not up to date, the Library Synchronization dialog will open to invite you to update them:



4. Select documents to update in your local library folder. Select **Remember selection** to retain the same selection next time you connect to the repository and select **Do not show this dialog next time** to have the library silently update from now on.



---

**Note:** You can display the Library Synchronization dialog and change your settings at any time by selecting **Repository > Synchronize Library**.

---

5. Click **OK** to perform any requested updates and begin modeling.

---

**Note:** To disconnect from the repository, select **Repository > Disconnect** (or right-click the root in the Browser **Repository** tab and select **Disconnect**).

---

### **Connecting Automatically to the Default Repository**

You can specify that you want to connect automatically to a repository each time you open PowerDesigner. On opening PowerDesigner will prompt for your password to the repository to which you were last connected.

1. Select **Tools > General Options** to open the General Options dialog and click the Repository category.
2. Select **Auto-connect** in the Connection group box, and then click **OK**.

For information about the other options on this tab, see *Repository Options* on page 265.

### **Changing Your Repository Password**

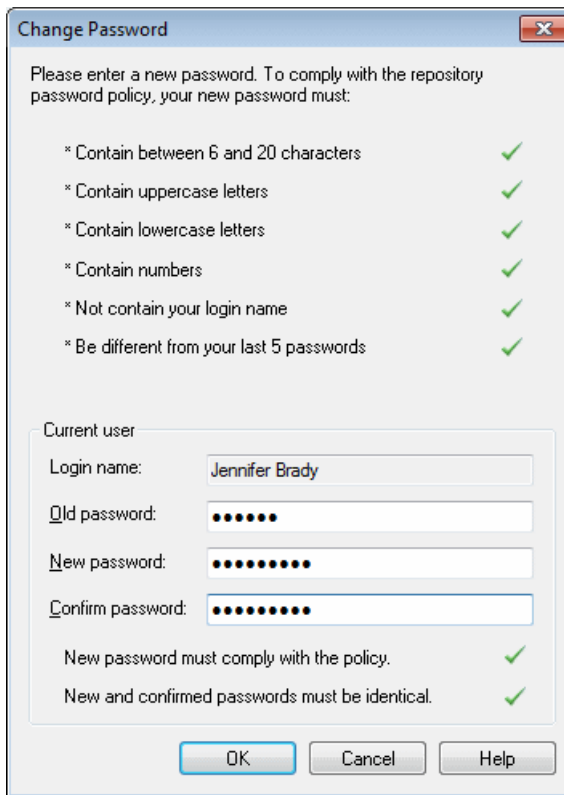
You can change the password that you use to connect to the repository at any time. You may be required to change your password if it has expired or if the password policy has become more restrictive.

---

**Note:** In the event that you have forgotten your password or have been blocked for multiple failed logins or inactivity, you must ask your administrator to reset your password (see *Unblocking Blocked Users* on page 536).

---

1. Select **Repository > Change Password** to open the Change Password dialog.  
The dialog lists the rules of the repository password policy that all passwords must respect (see *Defining a Password Policy* on page 528).
2. Enter your old password, and then enter your new password twice.



The image shows a 'Change Password' dialog box with a title bar containing a close button. The main text reads: 'Please enter a new password. To comply with the repository password policy, your new password must:'. Below this are six policy rules, each with a checkmark to its right:

- \* Contain between 6 and 20 characters
- \* Contain uppercase letters
- \* Contain lowercase letters
- \* Contain numbers
- \* Not contain your login name
- \* Be different from your last 5 passwords

Below the policy list is a section titled 'Current user' containing four input fields:

- Login name: Jennifer Brady
- Old password: (masked with dots)
- New password: (masked with dots)
- Confirm password: (masked with dots)

Below the input fields are two more policy checks, each with a checkmark to its right:

- New password must comply with the policy.
- New and confirmed passwords must be identical.

At the bottom are three buttons: 'OK', 'Cancel', and 'Help'.

When your new password conforms to all the policy rules and the values entered in the **New password** and **Confirm password** fields are identical, the **OK** button becomes available.

3. Click **OK** to complete the change and return to the repository.

## Connecting to a Database

PowerDesigner allows you to define *data connections* to access information in different database management systems (DBMSs) using Structured Query Language (SQL).

A data connection processes function calls and SQL requests coming from PowerDesigner and sends them to a data source, and returns results to PowerDesigner.

The PowerDesigner physical data model (see *Data Modeling*) and data movement model (see *Data Movement Modeling*) allow you to define data connections for target databases in order to generate your models and reverse engineer your data sources, while the repository (see *Chapter 10, The Repository* on page 287) requires a database to store your models and other design documents.

PowerDesigner supports various forms of connection, and your choice will depend on the interface that you have already installed:

You have...	Configure a connection of type...
ODBC driver	ODBC machine or file data source (see <i>Configuring ODBC Machine and File Data Sources</i> on page 19).
DBMS client	Native connection profile (see <i>Configuring Connection Profiles</i> on page 21).
JDBC driver	JDBC connection profile (see <i>Configuring Connection Profiles</i> on page 21).

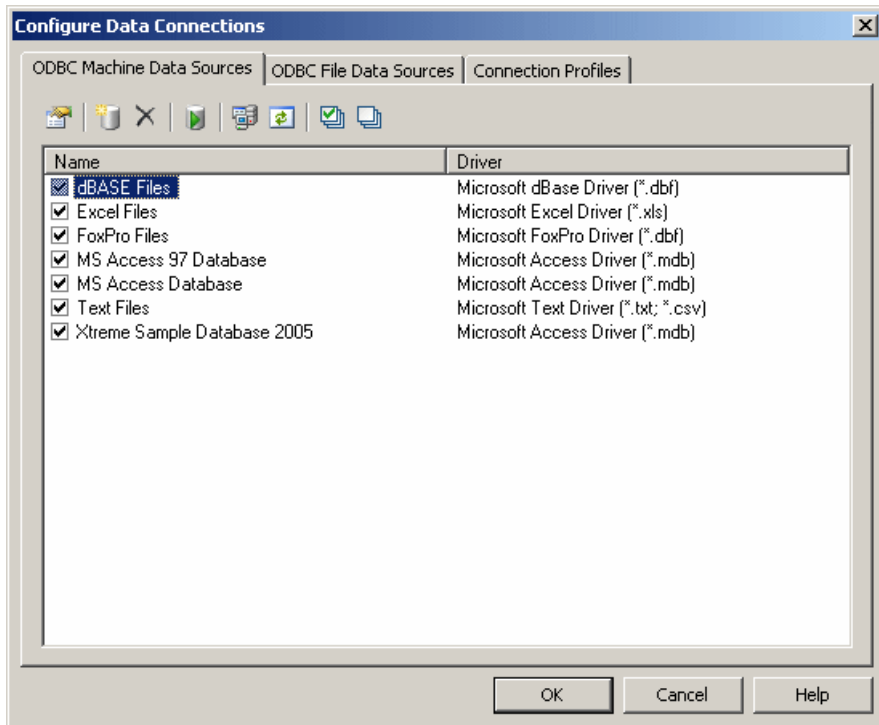
## **Configuring ODBC Machine and File Data Sources**

There are three types of Open Database Connectivity (ODBC) data sources:

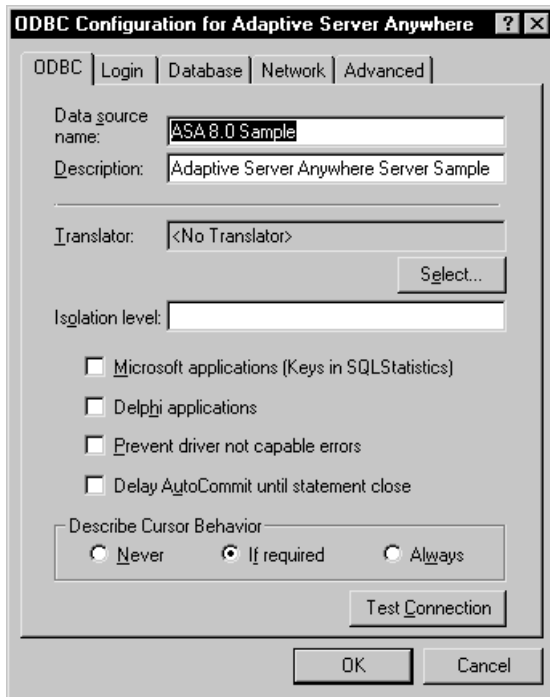
Data source	Description
Machine	Data source is created on the client machine, and is available to the user currently logged onto the system. Machine data sources are stored in the part of the registry containing settings for the current user.
System	Data source is created on the client machine, and is available to all users regardless of whether a user is logged onto the system or not. System data sources are stored in the part of the registry containing settings for the current machine.
File	Data source is stored as a file. A file data source has the extension .dsn. It can be used by different users if it is placed in the default location for file data sources. File data sources are usually managed by database administrators.

You define data sources using the Windows ODBC Administrator, which you can access directly from PowerDesigner:

1. Select **Database > Configure Connections** to open the Configure Data Connections window, and click the ODBC Machine Data Source or ODBC File Data Sources tab.



2. Click the Add Data Source tool (see *Data Connection Tools* on page 26) to open the Create New Data Source window, and select a File, User, or Machine data source as appropriate and click Next.
3. Select the appropriate driver for your DBMS and click Next and then Finish to access a driver-specific configuration dialog:

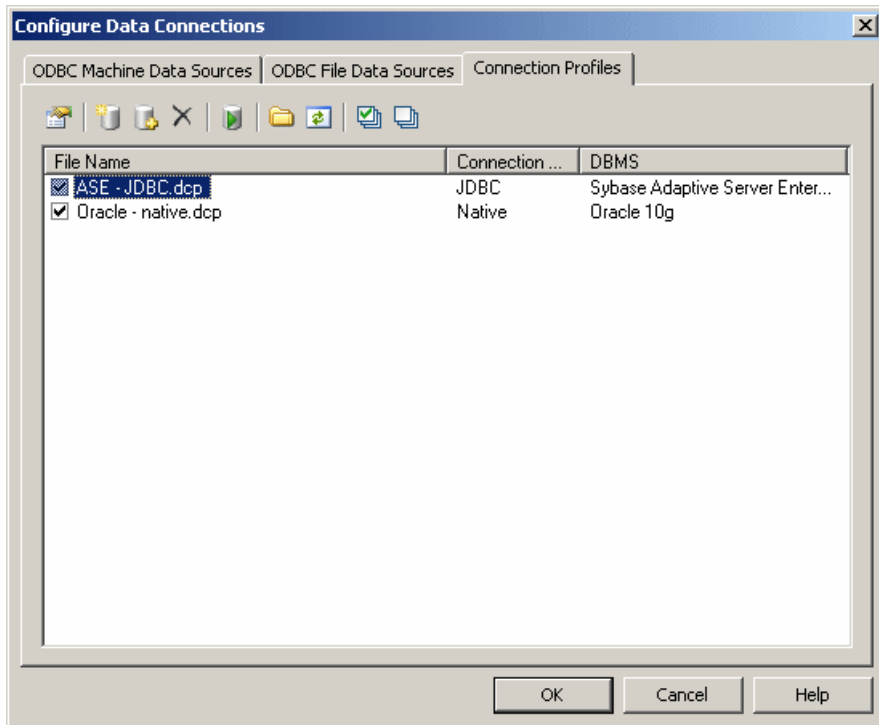


4. Enter the appropriate parameters and then click OK to return to the Configure Data Connections window.
5. Click OK to return to your model.

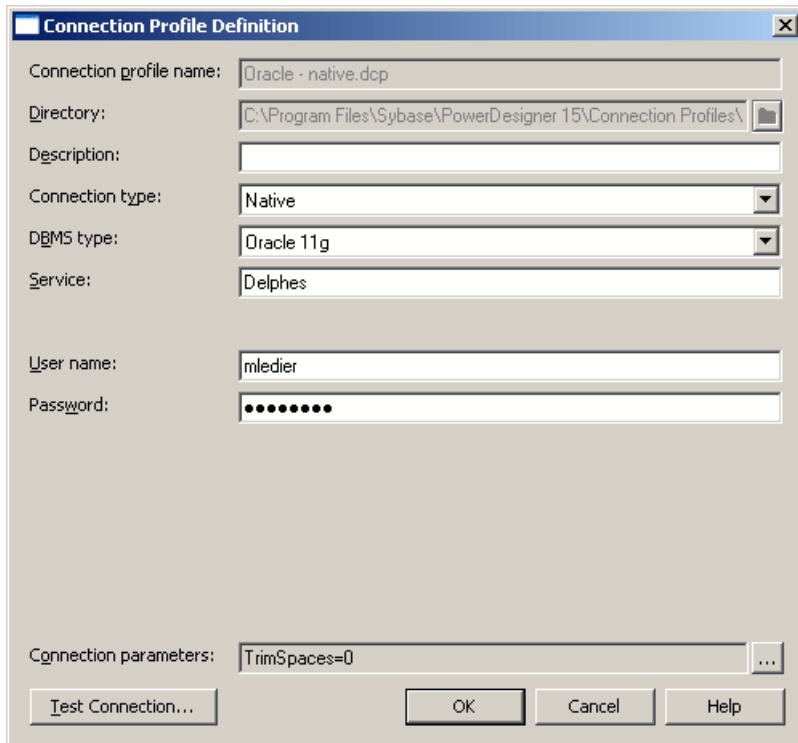
## **Configuring Connection Profiles**

Before you can connect to a database through a DBMS client or JDBC driver, you must create an appropriate connection profile.

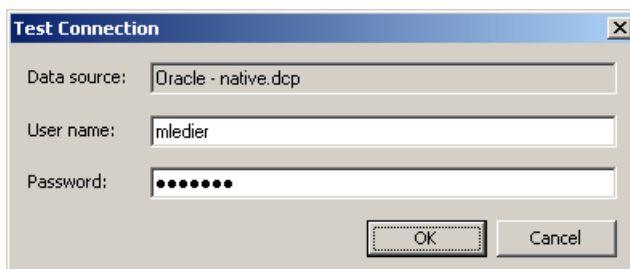
1. Select **Database > Configure Connections** to open the Configure Data Connections Window, and click the Connection Profiles tab:



2. Click the Add Data Source tool (see *Data Connection Tools* on page 26) to open a Connection Profile Definition window:



3. Enter the properties (see *Connection Profile Properties* on page 24) appropriate to your method of connection.
4. Click the Test Connection button to open the Test Connection window, and click OK to test your connection.



5. Click OK to close the profile definition, and return to the Configure Data Connections window
6. Click Ok to return to your model

### **Connection Profile Properties**

The Connection Profile Definition window lets you specify all the necessary properties for connecting to your database.

Property	Description
Connection profile name	Specifies the name of the connection profile.
Directory	Specifies the directory in which the .dcp connection file will be created. By default .dcp files are stored in the Connection Profiles directory directly beneath the PowerDesigner installation directory.
Description	Optional additional description of the connection profile.
Connection type	Specifies the type of connection profile. You can choose between: <ul style="list-style-type: none"> <li>• Native</li> <li>• JDBC</li> </ul> The choice of connection type will affect the remaining fields to be completed.
DBMS type	Specifies the DBMS to which the connection profile will connect. The list includes only those DBMSs supported for the specified connection type.
Server name	[Native only] Specifies the name of the database server to connect to.
Database name	[Native only] Specifies the name of the database to connect to.
Service	[Oracle Native only] Specifies the service name of the database to connect to.
User name	Specifies the username to use when connecting.
Password	Specifies the password to use when connecting.
JDBC driver class	[JDBC only] Specifies the driver class to use for the connection.
JDBC connection URL	[JDBC only] Specifies the connection URL to use for the connection.
JDBC driver jar files	[JDBC only] Specifies the driver jar file to use for the connection.
Connection parameters	Specifies advanced connection parameters. Click the parenthesis tool to the right of this field to access the Connection Parameters window.

### **Connection Parameters Window**

You access this window by clicking the parenthesis tool to the right of the Connection parameters field in the Connection Profile Definition window.

1. Click the Add a Row tool to create a new parameter.
2. Enter a name and value pair in the two columns.



3. Click OK to return to the Connection Profile Definition window. All the parameters are listed in the read-only Connection parameters field.

### **Native Connection Profile Example**

In the example below, I have installed the Oracle DBMS client, and so create a Native connection to the "Delphes" service.

The screenshot shows the "Connection Profile Definition" dialog box. It contains the following fields and controls:

- Connection profile name:** Oracle - native.dcp
- Directory:** C:\Program Files\Sybase\PowerDesigner 15\Connection Profiles\ (with a browse button)
- Description:** (empty text box)
- Connection type:** Native (dropdown menu)
- DBMS type:** Oracle 11g (dropdown menu)
- Service:** Delphes
- User name:** mledier
- Password:** (masked with dots)
- Connection parameters:** TrimSpaces=0 (with an expand button "...")
- Buttons:** Test Connection..., OK, Cancel, Help

### **JDBC Connection Profile Example**

In the example below, I have installed the Sybase ASE JDBC driver. I specify the appropriate driver class in the jar file, and assemble the connection URL to create a JDBC connection to my database, "Green", on my server "Rainbow".

**Connection Profile Definition**

Connection profile name: ASE - JDBC.dcp

Directory: C:\Program Files\Sybase\PowerDesigner 12\Connection Profiles\

Description:

Connection type: JDBC

DBMS type: Sybase Adaptive Server Enterprise

Server name:

Database name:

User name: graham

Password: .....

JDBC driver class: com.sybase.jdbc3.jdbc.SybDriver

JDBC connection URL: jdbc:sybase:Tds:Rainbow:5000/Green





JDBC driver jar files: C:\Program Files\Sybase\PowerDesigner 12\conn3.jar







Connection parameters: Driver='com.sybase.jdbc3.jdbc.SybDriver',URL='jdbc:sybase:Tds:

Test Connection... OK Cancel Help

### **Data Connection Tools**

The Configure Data Connections window provides tools to manipulate your connections to data sources.

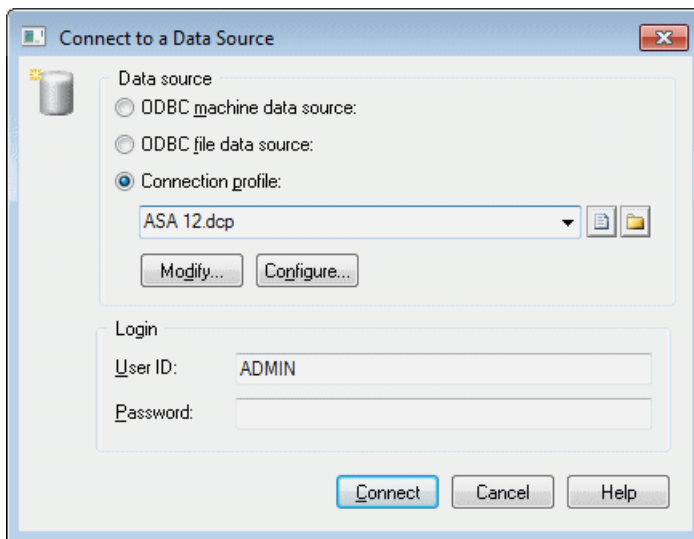
Tool	Description
	Properties – Opens the ODBC Setup or Connection Profile Definition dialog for the selected profile.
	Add Data Source – Creates a new connection.
	Browse Data Source File [ODBC file data sources and connection profiles] – Opens a file browser to select a .dcp profile file.
	Delete – Deletes the selected connection.

Tool	Description
	Test Connection – Tests the selected connection.
	ODBC Administrator [ODBC machine and file data sources] – Opens the ODBC Data Sources Administrator window.
	Change Connection Profiles Directory [Connection profiles] – Opens a file browser in which to search for profiles. The default directory is install_dir/Connection Profiles.
	Refresh – Refreshes the list of connections.
	Select All – Selects all the connections in the list. Connections that are selected will be displayed in lists in the PowerDesigner interface.
	Unselect All - Unselects all the connections in the list. Connections that are not selected will not be displayed in lists in the PowerDesigner interface.

## Connecting to a Data Source

When you connect to your database, PowerDesigner can communicate with it for reverse-engineering, generation or any other form of request.

1. Select **Database > Connect** to open the Connect to a Data Source window:



2. Select one of the following radio buttons, depending on your chosen method for connecting to your data source:
  - ODBC machine data source (see *Configuring ODBC Machine and File Data Sources* on page 19)

## CHAPTER 1: Getting Started with PowerDesigner

- ODBC file data source (see *Configuring ODBC Machine and File Data Sources* on page 19) - use the tool to the right of the data source field to browse to a new file
- Connection profile (see *Configuring Connection Profiles* on page 21) - use the tools to the right of the data source field to browse to a new directory or file

You can use the **Modify** and **Configure** buttons to modify or configure the selected connection.

3. Enter your user ID and password, and then click **Connect**. If prompted by your data source, you may need to enter additional connection parameters.

---


**Note:** You stay connected until you disconnect or terminate the shell session.

---

### Running SQL Queries Against Your Database

You can use the Execute SQL Query dialog to query your database.

In addition to the standard tools (see *Text Editor Tools* on page 204), the following tools are available in this dialog:

Tool	Description
	Run ( <b>F5</b> ). Executes the current script
[n/a]	Insert Bookmark ( <b>Ctrl+F2</b> ) – inserts a blue bookmark box at the cursor position. Press <b>Ctrl+F2</b> to delete the bookmark.
[n/a]	Go to Next Bookmark ( <b>F2</b> )
[n/a]	Go to Previous Bookmark ( <b>Shift+F2</b> )

### License Management

You can evaluate PowerDesigner by obtaining a fully featured trial version, which expires 15 days after installation. If you need more than 15 days to evaluate PowerDesigner, you can obtain an extension from Sybase, which will be provided as a standalone local license granted for a limited period of time. To continue to use PowerDesigner after the trial period, you must purchase a regular license from Sybase or a reseller.

PowerDesigner is licensed as a package of modules, or types of model. Various packages are available, each regrouping some or all of the modules. Your permission to use these modules is controlled by the Sybase licensing system, SySam (see *Installation Guide > Planning Your PowerDesigner® Installation* or visit <http://www.sybase.com/sysam>).

The following types of license are available:

- *Standalone seat (local)* – installed on a specific machine and cannot be used on other machines. PowerDesigner reviews the local license file and authorizes only the use of modules for which a valid license is present. This type of license is convenient for smaller

teams as it does not require a license server, but does not allow you to centralize license management.

- *Standalone seat (served)*— assigned to a specific machine but served from a license server. You must be connected to the license server to obtain the license when you start PowerDesigner, and connect to the server at least once every 30 days in order to retain it. This type of license is convenient for larger teams, when you want the security of centralized license activation and management.

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**Note:** A 15 day grace period is granted for users with standalone licenses when the license server cannot be contacted or the license file cannot be read. There is no grace period for floating licenses.

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- *Floating license (served)*— licenses can be requested from the license server by any machine, and are returned after use, or after 3 hours of inactivity. This type of license is convenient for teams of all sizes where usage patterns allow the sharing of licenses. You must be connected to the license server in order to obtain a license, and must remain in contact (brief losses of contact only are permitted) in order to continue using it. When a user begins to work after a period of inactivity, PowerDesigner will automatically try to obtain a license, and if it is unable to do so, will display a message suggesting that you save your work.

---

**Note:** For periods when you must be out of contact with the server, you can request a mobile license (see *Obtaining a Mobile License* on page 31) for up to 30 days.

---

### License Management Wizard

The License Management Wizard provides the same licensing options as the PowerDesigner setup program. Note that you do not need to be administrator on your machine to access the License Management Wizard.

You may need to access the wizard when:

- *Moving from a trial license to a regular license* - You may need to rerun the setup program before launching the wizard if you need to install additional modules.
- *Extending a trial license*— After having requested your extension (which will be in the form of a time-limited standalone local license) from Sybase.
- *Obtaining a trial of a new package*— You must rerun setup to install the additional modules before launching the wizard.
- *Moving from a standalone local to a standalone served license or from a standalone to a floating license*— You must be able to connect to the license server to make this change.

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**Note:** The PowerDesigner plugin for Sybase Workspace is licensed with the other components of Workspace, and the following procedure is not available for Workspace users. For more information about licensing in Workspace, see the Sysam documentation provided with Workspace.

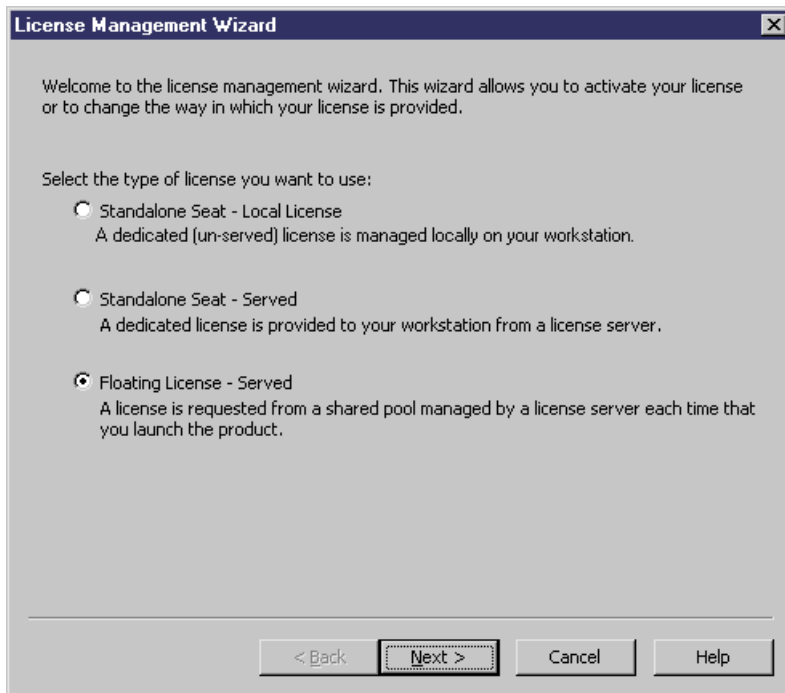
---

1. Select **Tools > License Parameters** to open the Wizard.

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**Note:** If you have taken a mobile license, you will be prompted to return it before accessing the wizard. If you are using a served license and the server cannot be contacted, an error message will be displayed and you will not be able to access the wizard.

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2. Select a type of license (see *License Management* on page 28) and then click **Next**:
  - [local licenses] You must provide a valid license key. Follow the instructions to load the key and then click **Finish** to validate your license and exit the wizard.
  - [if you select to use a served license] Specify the name of the license server (and if your administrator has specified one, a port number), and click **Next**
3. Specify the PowerDesigner package that you want to use, and then click **Finish** to validate your license and exit the wizard.

---

**Note:** The list displays all the packages that are available on the server but does not necessarily mean that a license for a particular package is available. If no license is available for the selected package, you must select an alternate package or click **Cancel** to restore your previous license configuration.

---

- If you are in trial mode, a license agreement dialog box is displayed.
- If you have selected a standalone local license, the license file information is added to the license folder as a new license file.
- If you have selected a served option (standalone or floating) a new license file is created to store the server name and port number.

- If you have selected a different package, the new models of the package will be available the next time you start PowerDesigner.

### **Obtaining a Mobile License**

When you are using a floating license and anticipate being out of contact with the license server, you can borrow a mobile license to allow you to continue using PowerDesigner for up to 30 days.

1. Select **Tools > Take Mobile License**.

A confirmation dialog box is displayed.

2. Click **Yes** to obtain a mobile license and click **OK** to confirm.

Once you have obtained a mobile license, the 30 day limit is renewed automatically each time you connect to the license server. If you do not contact the server for 30 days, the mobile license is returned to the pool and you will not be able to use PowerDesigner until you reconnect.

---

**Note:** When you no longer need the mobile license you should return it to the server to make your license seat available to the general license pool. To do so, select **Tools > Return Mobile License**.

---

### **Troubleshooting Licensing Problems**

In rare cases, PowerDesigner may repeatedly fail to obtain authorization from a local license file or the license server. If this happens, you can troubleshoot as follows:

1. Exit PowerDesigner and navigate to the following directory:  
C:\Documents and Settings\All Users\Application Data\PowerDesigner x
2. Move any file with the .lic extension this folder to a safe place.
3. Make a backup copy of the file sysam.properties, and open it in a text editor. Remove the lines starting "Pd.LicenseMode" and "Pd.Package" at the end of the file and save the file.
4. Restart PowerDesigner.

You will be prompted to open the License Management Wizard (see *License Management Wizard* on page 29). Re-load your local license key or select the appropriate served license type.

### **PowerDesigner Documentation**

Full documentation is provided as context-sensitive help by pressing **F1** and as PDFs by selecting **Help > Online Documentation**.

The following manuals are provided with your PowerDesigner installation:

- *New Features Summary*
- *Quick Reference*
- *Installation Guide*
- *Core Features Guide*
- *Requirements Modeling*
- *Enterprise Architecture Modeling*
- *Business Process Modeling*
- *Data Modeling*
- *Data Movement Modeling*
- *Object-Oriented Modeling*
- *XML Modeling*
- *Customizing and Extending PowerDesigner*

This documentation is also available for consultation or download from <http://sybooks.sybase.com>.

Demonstration videos are also available. They can be installed with PowerDesigner (select **Help > Tutorial Videos**) or viewed from the installation CD.

For documentation of the PowerDesigner metamodel, click **Help > Metamodel Objects Help** (or click the **Find in MetaModel Objects Help** button at the bottom-right of the **Version Info** tab of the property sheet of any object).

## SAP Platform Support

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PowerDesigner provides support for various components in the SAP platform.

### *SAP HANA*

PowerDesigner supports round trip reverse-engineering and generation of SAP HANA® v1.0 SP07 tables and analytic and attribute views.

For detailed documentation, see *Data Modeling > DBMS Definition Reference > SAP HANA Database*.

### *SAP Business Suite*

An SAP Business Suite installation is built on a complex database structure, which comprises many thousand tables with often cryptic names, and may include large numbers of customizations. In certain environments, there may be multiple servers, each with different customizations. PowerDesigner allows you to browse the application component and package hierarchy and to import them and their supporting logical objects for analysis, comparison, and merging of data dictionaries, and can also help you prepare a HANA table structure to allow consolidated reporting on one or more SAP® Business Suite installations.

PowerDesigner supports importing any recent version of SAP® Business Suite.



For detailed documentation, see *Data Modeling > DBMS Definition Reference > SAP Business Suite*.

### **SAP BusinessObjects**

PowerDesigner supports generation of a SAP® BusinessObjects™ universe from your PDM for editing in the BusinessObjects Universe Design or Information Design tools, or for direct consumption by the Web Intelligence rich client. Generating a universe from your PDM gives you access to table, view, and column names and comments and more reliable cardinality information than if you create a universe directly from your database.

To generate universes, you must have SAP® BusinessObjects™ SBOP BI Platform Clients 4.0 SP04 Patch 3 (v14.0.4.819) or higher installed on your workstation. On Windows Vista or Windows 7 machines, if PowerDesigner fails to recognize a valid BusinessObjects installation, it may be necessary separately to launch the Universe Design tool one time with administrator privileges to enable the BusinessObjects SDK.

For detailed documentation, see *Data Modeling > Building Data Models > Generating and Reverse-Engineering Databases > Generating an SAP BusinessObjects Universe*.

### **SAP Solution Manager**

PowerDesigner supports round-trip importing and exporting of SAP® Solution Manager v7.1 SP08 projects. You can import and modify existing business scenarios and processes; create new ones, and re-export your project to your Solution Manager server.

For detailed documentation, see *Business Process Modeling > SAP Solution Manager*

### **SAP NetWeaver**

PowerDesigner supports round-trip importing and exporting of SAP NetWeaver® BPM v7.3 and higher BPMN2 files.

For detailed documentation, see *Business Process Modeling > BPMN 2.0 Descriptive and Executable > Importing and Exporting BPMN2 Files*.

## **Next Steps**

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Now that you are familiar with the PowerDesigner Interface, you will want to start experimenting with a particular type of model suitable to your needs.

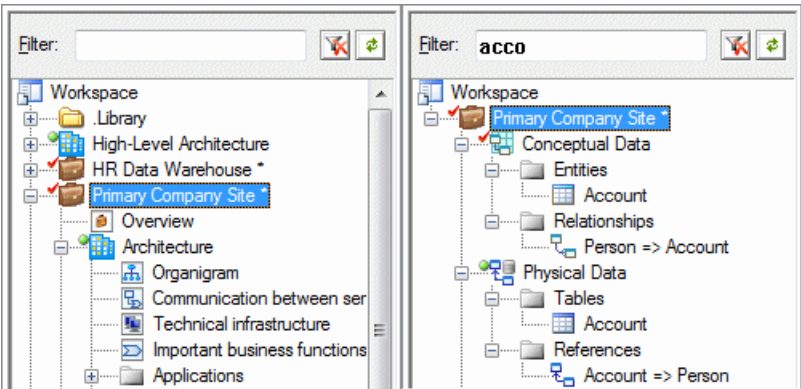
- *Requirements Model (RQM)* - Now turn to the *Requirements Modeling* guide where you will learn how to:
  - Add, modify, promote and demote requirements in the requirements hierarchy
  - Allocate requirements to particular team members and add traceability links to other model components
  - Import requirements from a structured MS Word document
  - View traceability and user allocation reports

- *Enterprise Architecture Model (EAM)*- Now turn to the *Enterprise Architecture Modeling* guide where you will learn how to:
  - Create diagrams in the business, application, and technology layers
  - Import Visio diagrams
  - Export and Import objects to and from other models
- *Business Process Model (BPM)*- Now turn to the *Business Process Modeling* guide where you will learn how to:
  - Create Process Hierarchy, Business Process, Process Service, and Composite Process diagrams
  - Manipulate Service Description Objects
  - Generate an executable BPM, and implement processes
- *Conceptual Data Model (CDM), Logical Data Model (LDM), or Physical Data Model (PDM)* - Now turn to the *Data Modeling* guide where you will learn how to:
  - Create CDM entities and relationships between them
  - Create LDM or PDM tables, columns, primary keys, indexes, and references and define referential integrity
  - Create PDM views, triggers, and abstract data types
  - Create business rules, domains, and data items
  - Generate a PDM from your CDM or LDM
  - Reverse engineer from and generate to database scripts
  - Work with PDM multidimensional diagrams
- *Data Movement Model (DMM)*- Now turn to the *Data Movement Modeling* guide where you will learn how to:
  - Define databases, replication processes, event scripts, and other replication objects
  - Reverse engineer from and generate to the SAP® Sybase® Replication Server® replication engine
  - Design extract, transform, and load (ETL) operations to move data between databases
- *Object-Oriented Model (OOM)*- Now turn to the *Object-Oriented Modeling* guide where you will learn how to:
  - Design class, use case, and other standard UML diagrams
  - Generate a PDM with O/R mapping
  - Create an EJB
  - Deploy a component
- *XML Model (XSM)* - Now turn to the *XML Modeling* guide where you will learn how to:
  - Define elements, entities, and other components of an XML schema
  - Reverse engineer from and generate to DTD, XSD, and XDR files
  - Generate an XSM from a PDM or OOM

# CHAPTER 2      The Browser

The **Local** tab of the Browser provides a hierarchical view of all the model objects in your workspace. If the Browser is not visible, select **View > Browser** (or press **Alt+0**) to display it.

To expand all nodes, press the numpad plus sign (+). To collapse all nodes, press the numpad minus sign (-). To filter the Browser tree, start typing the name of an object that you want to find in the **Filter** box:



PowerDesigner monitors your local documents against the versions stored in the repository, and communicates their status using icons to the left of the document icons:

Status	No Locks	Locked by You (Green Padlock)	Locked by Other (Red Padlock)
Up to Date (Green Circle)			
Local Changes (Red Check-mark)			
Changes on Server (Yellow Exclamation)			
Local and Server Changes			

**Note:** You can control the display of status icons with the **Display status icons in Local Browser** general option (see *Repository Options* on page 265).

A typical hierarchy of objects in the Browser **Local** tab may include:

## CHAPTER 2: The Browser

- *Workspace* - The root of every Browser tree, which contains and organizes all your models and supporting documents (see *Workspaces* on page 42).
- *Library* - A folder containing enterprise models that are pushed automatically to all users when they connect to the repository (see *The Library* on page 39)
- *Projects* - Act as containers for models and other documents, allowing you to save them as a single unit in the repository (see *Chapter 3, Projects and Frameworks* on page 47).
- *Folders* - Organize models and other files (see *Folders* on page 42).
- *Models* - Are the basic design unit in PowerDesigner and contain one or more diagrams and any number of model objects (see *Models* on page 43).
- *Packages* - Divide large models into smaller "sub-models" to avoid manipulating large sets of objects, and can be used to assign different tasks or subject areas to different development teams (see *Packages* on page 44).
- *Diagrams* - Graphical views of model objects (see *Diagrams* on page 169).
- *Model objects* - Include all items belonging to a model (see *Chapter 4, Objects* on page 89).
- *Reports* - Are generated to document your models (see *Chapter 12, Reports* on page 363).

You can create objects from the Browser (see *Creating Objects from the Browser* on page 90) and drag, drop, and copy objects in the Browser, or between the Browser and the Canvas (see *Moving, Copying, and Deleting Objects* on page 122).

To find the Browser entry for a diagram symbol, right-click it and select **Edit > Find in Browser**. To find the diagram symbol for a Browser entry, right-click it and select **Edit > Find in Diagram**.

## The Glossary

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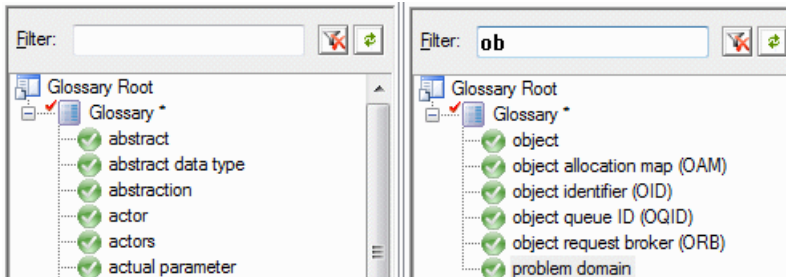
In environments with a repository, administrators can deploy an enterprise glossary to help everyone to use the same approved terms between projects for enterprise-wide consistency. Updates to the glossary are pushed to users each time they connect to the repository or on demand. The glossary appears in the Browser **Glossary** tab.

The glossary can contain the following objects:

- *Terms* - are words or phrases that are approved for use in naming model objects. When you enable the glossary for your model, glossary terms are proposed as you enter object names.
- *Synonyms* - are words or phrases that are not approved for use in naming objects, and which are associated with the terms that should be used instead. The approved terms are proposed when you begin entering a synonym as an object name.
- *Categories* - to organize your terms. Each term can only appear in a single category.
- *Glossary terms lists* (see *Glossary Terms Lists* on page 546), *dependency matrices* (see *Dependency Matrices* on page 180), and *reports* (see *Chapter 12, Reports* on page 363) - to present glossary terms in various ways.

- Business Rules - see *Business Rules* on page 131.

Use the **Glossary** browser tab to review the approved terms, and double-click a term or synonym to open its property sheet, to view supporting information or references. Start typing the word you want to find in the Filter box at the top of the Browser to filter the glossary in real time:



**Note:** You can only edit the glossary if you have Write permission on the glossary model (see *Deploying an Enterprise Glossary* on page 541).

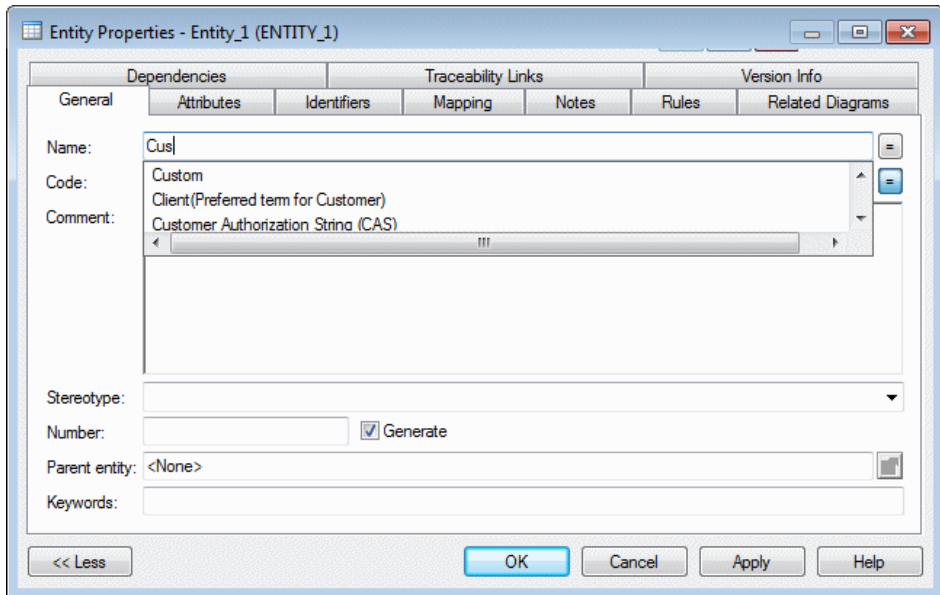
Select **Tools > General Options** and select the **Glossary** category to control the appearance of the **Glossary** tab with the following options:

Option	Description
Show glossary tab	Shows the Browser <b>Glossary</b> tab.
Display	Controls whether names or codes appear in the Browser <b>Glossary</b> tab.

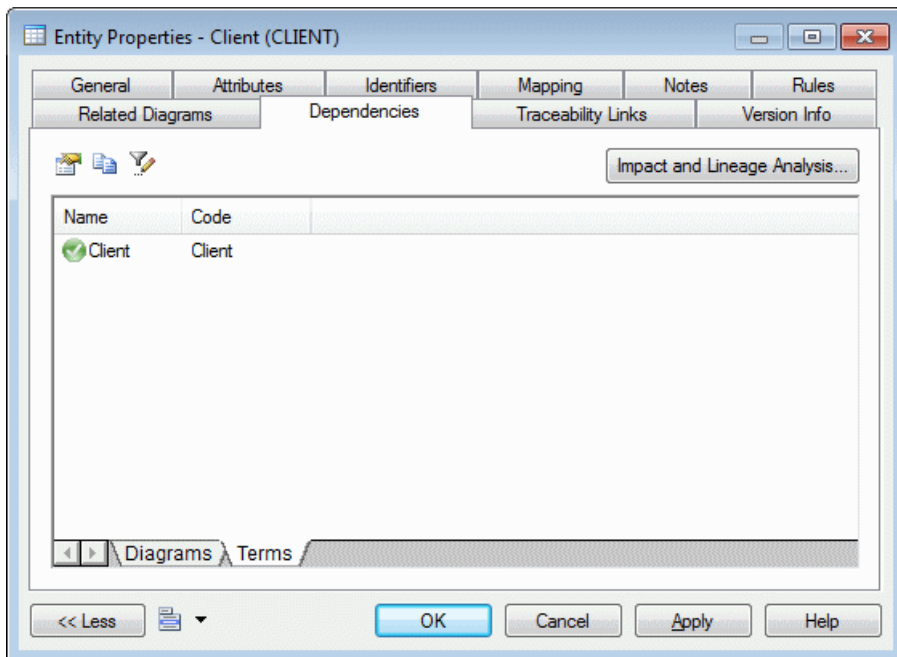
## Using Glossary Terms in Your Models

Enabling the glossary in your model provides autocompletion for object names (including guidance to discourage the use of synonyms) and enables model checks to guide your models toward glossary compliance.

1. Select **Tools > Model Options**, then click **Naming Convention** in the category list and select **Use glossary for autocompletion and compliance checking** to enable the use of the glossary in your model.
2. When entering the names of objects in property sheets, diagram symbols, object lists, or in the Browser, glossary terms are suggested to autocomplete the name. Continue typing or use the down arrow to descend to a term in the list, and press **Enter** to select it.



If you click the object's **Dependencies** tab, the link to the chosen term is listed there:



3. [optional] Perform a model check to see which objects have names containing terms that are not included in the glossary (see *Checking Glossary Compliance* on page 142).

## Term Properties

To view a term's properties, double-click its Browser entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator.

The **General** tab contains the following properties:

Property	Description
Name/Code	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Description	Provides an explanation for the definition of the term. For information about using the RTF editing tools, see <i>Text Editor Tools</i> on page 204.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Reference URL	Specifies a site, which provides more information about the term.

The following tabs are also available:

- **Synonyms** - Specifies the synonyms of the term, which are not approved for use. The **Parent** property of a synonym specifies the term with which the synonym shares a meaning, and which should be used instead of the synonym.
- **Related Terms** - Specifies other terms associated with the term.

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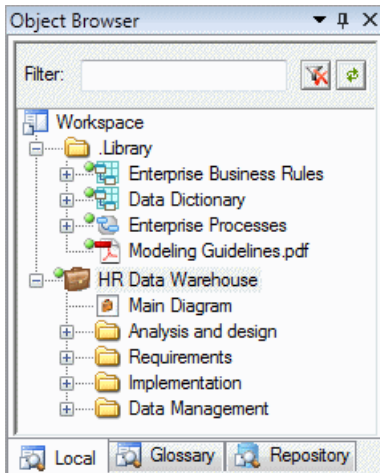
**Note:** Only an administrator or other user with Write permission on the glossary can edit terms (see *Creating Terms, Synonyms, and Related Terms* on page 541).

---

## The Library

In environments with a repository, administrators can deploy an enterprise library containing reference models, resource files, and other documents to share generic modeling objects between projects. Updates to the library are pushed to users each time they connect to the repository or on demand. Models and other documents appear in a special folder in the Browser **Local** tab.

The library appears by default at the top of your workspace as a folder named **.Library** and provides access to enterprise reference models (such as a data dictionary or a PDM containing standard domains) for reuse in your projects as shortcuts or replicas, and other reference documents:



You can rename your local library folder, move it in the Browser tree or detach it from your workspace. To reinstate your Library if you have removed it, select **Repository > Reinitialize Local Library**.

The library documents and resource files are automatically updated whenever you connect to the repository (see *Connecting to a Repository* on page 15) and you can control which ones will be pushed to your workspace. You can, at any time, confirm that you have the very latest version of library documents by selecting **Repository > Synchronize Library**.

Resource files, such as DBMS or language definition files and extensions, are not displayed in the Browser, but appear automatically in the new model dialog, resource file lists, and anywhere in the interface where a resource file can be selected.

---

**Note:** By default, library documents are checked out to a subfolder inside `My Documents/PowerDesigner Libraries`, controlled by the `_SHARED` named path (see *Named Paths* on page 259). You can only check in changes to library documents if you have write permission on the library folder or on one or more of its children (see *Deploying an Enterprise Library* on page 549).

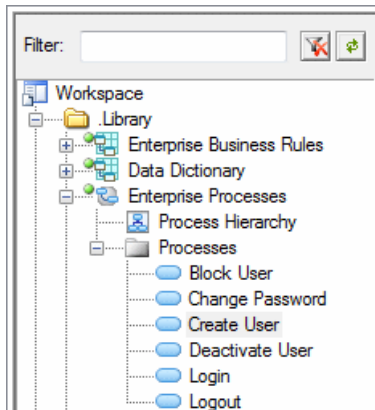
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### **Reusing Library Objects in Your Models**

Library models can contain reference objects that are intended for reuse in your models in the form of shortcuts or replicas.

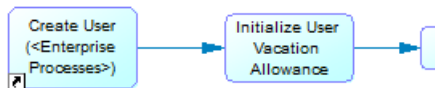
1. Expand the library model in the Browser to show the object that you want to reuse:





2. Right-click on the object in the library model and drag and drop it into your model diagram where you want to reuse it (or onto a model or package in the Browser).
3. Release the right mouse button, and select one of the following:
  - **Create Shortcut(s) Here** - when you want create a reference to the library object.
  - **Replicate Here** - when you want to create a local copy of the library object and make changes to one or more of its properties

The shortcut or replica is created in your model, and can be connected to any appropriate locally-created objects. In this example, a shortcut to the `Create User` library object is connected to other locally-created objects:



If the library object subsequently changes, any updates will cascade automatically to your model.

---

**Note:** For detailed information about working with shortcuts and replicas, see *Chapter 15, Shortcuts and Replicas* on page 455.

---

## The Repository Browser

---

The **Repository** tab in the Browser displays the content of the repository to which you are currently connected.

For more information, see *Browsing the Repository* on page 287.

## Workspaces

---

The **Local** tab of the Browser contains a workspace to organize all your modeling and supporting files. You can create projects, models, and folders in a workspace. To add external files, drag and drop them from Windows Explorer.

We recommend that you save your workspace regularly:

- To perform a standard save - select **File > Save Workspace** or right-click the workspace node in the Browser and select **Save**. You will be prompted to save any models that contain changes.
- To save the workspace under another name - select **File > Save Workspace As** to open a standard Save As dialog, or right-click the workspace node in the Browser and select **Save As**. You will be prompted to save any models that contain changes.
- To save the workspace and all the models it contains - select **File > Save All**, or click the **Save All** tool.

---

**Note:** Workspace files (\*.sws) contain only the structure of the workspace. Deleting the workspace file in Windows Explorer will not delete any projects, models, or other referenced files.

---

To create a new workspace, simply close the current workspace by selecting **File > Close Workspace**. You will be prompted to save the workspace and any models that contain changes, and a new, empty workspace will open.

You can create multiple workspaces, but only one can be open at a time. To change workspace, select **File > Open Workspace**. You will be prompted to save the current workspace and any models that contain changes, and the selected workspace will open. The models contained in the workspace are not open by default.

## Folders

---

You can use folders to organize the projects, models, and other files in your workspace. The folder structure is saved in the workspace file.

To create a folder, right-click the workspace root or another folder and select **New > Folder**, then enter a name in the highlighted area. Folder names must be unique in the workspace.

To create a project, model, or multi-model report in a folder, select the folder and use the standard tools, or right-click the folder and select **New > New item**.

To add an existing project, model, or multi-model report to a folder from another location in the Browser, drag and drop it onto the folder. You can also drag and drop PowerDesigner and other files from Windows Explorer to the Browser.

To delete a folder, select it and click the **Delete** tool or right-click it and select **Edit > Delete**.

---

**Note:** Deleting a folder cannot be undone. When you delete a folder, you remove the models and reports it contains from the workspace, but you do not delete them.

---

## Models

---

Models are the basic work unit in PowerDesigner. You can create a model directly in the workspace, in a folder, or as part of a project.

To create a model, click the **New** tool or select **File > New Model** (see *Creating a Model* on page 9). For a list of available types of models, see *PowerDesigner Models* on page 6. For detailed information about a particular type of model, and for information about creating a model by importing, generating or reverse engineering, see the appropriate modeling guide.

To add an existing model to the workspace, click the **Open** tool or select **File > Open**, browse to the model file, and click **Open**. To open the model as read-only, select the **Open as read-only** check box.

---

**Note:** By default, when you open a workspace, its models are closed and bear a red dot in their bottom-left corners. To open a closed model, double-click it or right-click it and select **Open** or **Open as Read-only**. To close an open model to free up memory, right-click it and select **Close**.

---

When a model contains unsaved changes, an asterisk is appended to its name in the Browser. When you save a model or a multi-model report, PowerDesigner assigns it a unique identifying number called GUID (Global Unique ID, which is used to identify documents in the Repository and during model generation), and creates a backup copy of your file with the same identifying number:

- To perform a standard save - select **File > Save**, click the **Save** tool, or right-click the model entry in the Browser and select **Save**.
- To save the model as a backup version with the same GUID - select **File > Save As**, or right-click the model node in the Browser and select **Save As**.
- To save the model as a new model with a new GUID - select **File > Save As New Model**, or right-click the model node in the Browser and select **Save As New Model**. If you check the new model into the repository, it must be as a new model without any revision history. Other models with shortcuts pointing to the original model will continue to be connected to that model.
- To save the workspace and all the model it contains - select **File > Save All**, or click the **Save All** tool.

---

**Note:** The following formats are available when you save a model:

---

- XML - [default] Larger and somewhat slower to load, but editable in a text editor. Recommended for small to medium-sized models.
- Binary - Smaller and faster to load, but not editable outside of PowerDesigner. Recommended for large models.

---

To change the display name of a model in the Browser, select it and press **F2**, or right-click it and select **Rename**.

To delete a model from the workspace, select it and click the **Delete** tool, press **Del**, or right-click it and select **Detach From Workspace**. The model is removed from the workspace, but the file is not deleted from your disk.

## Packages

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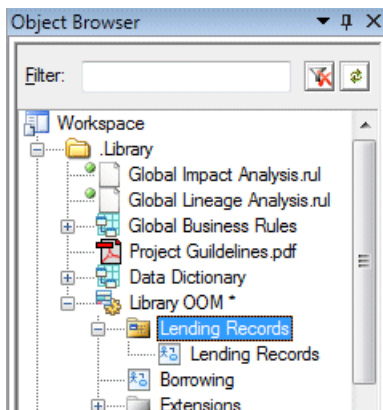
A package is a piece of a model. When working with large models, you can split them into smaller subdivisions in order to avoid manipulating the entire model at once. Packages can be used to organize your model into different tasks and subject areas, and to assign parts of it to different development teams.

You can create as many packages as you need in a model. The name of each package must be unique in the model. You can decompose a package into other packages, and there is no limitation to the decomposition depth.

Packages can contain the same kinds of items as models:

- Model objects
- Other packages
- Diagrams, in order to have different views of the contents of the package. Each package has a default diagram

In the example below, a package called "Lending Records" (with a diagram of the same name) has been added to the model "Library OOM":



Note that you cannot save a package individually. When you save the model you also save all the packages it contains.

## **Creating a Package**

You can create package from the Toolbox, Browser, or **Model** menu.

- Use the **Package** tool in the diagram Toolbox.
- Select **Model > Packages** to access the List of Packages, and click the **Add a Row** tool.
- Right-click the model or package in the Browser and select **New > Package**.

When you create a package in models with multiple kinds of diagrams, you may be required to specify the type of diagram to create in the package.

For general information about creating objects, see *Core Features Guide > Modeling with PowerDesigner > Objects*.

## **Package Properties**

To view or edit a package's properties, double-click its diagram symbol or Browser or list entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator.

---

**Note:** The same properties (except where noted) are also available for project folders.

---

The **General** tab contains the following properties:

Property	Description
Name/Code/Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Default diagram	[package only] Specifies the diagram to display by default when you open the package.
Use parent namespace	[package only] Specifies that the package does not represent a separate namespace from its parent and thus that objects created within it must have names that are unique within the parent container. If this property is not selected, then the package and its parent package or model can both contain objects that are called Object A.

Property	Description
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple key-words, separate them with commas.

## Controlling the Namespace of a Package

PowerDesigner applies uniqueness checks on the names of objects. The *namespace* defines an area in which the name and the code of an object of a given type must be unique. You can decide whether an individual package must represent a separate namespace or not with the **Use parent namespace** property.

Depending on the type of model where you create a new package, this option may be selected by default:

- For the EAM, CDM, LDM, PDM, DMM, and FEM - the entire model is, by default, a single namespace, and all the packages have the **Use parent namespace**. PowerDesigner applies checks on uniqueness at the model level.

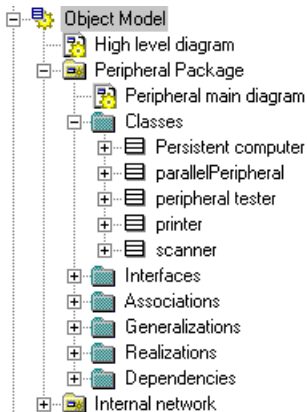
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**Note:** The Glossary and XSM do not support packages. For information on namespaces in the XSM, see *XML Modeling*.

---

- For the OOM, RQM and BPM – each package is, by default, a separate namespace and the property is not selected. PowerDesigner applies checks on uniqueness at the package level.

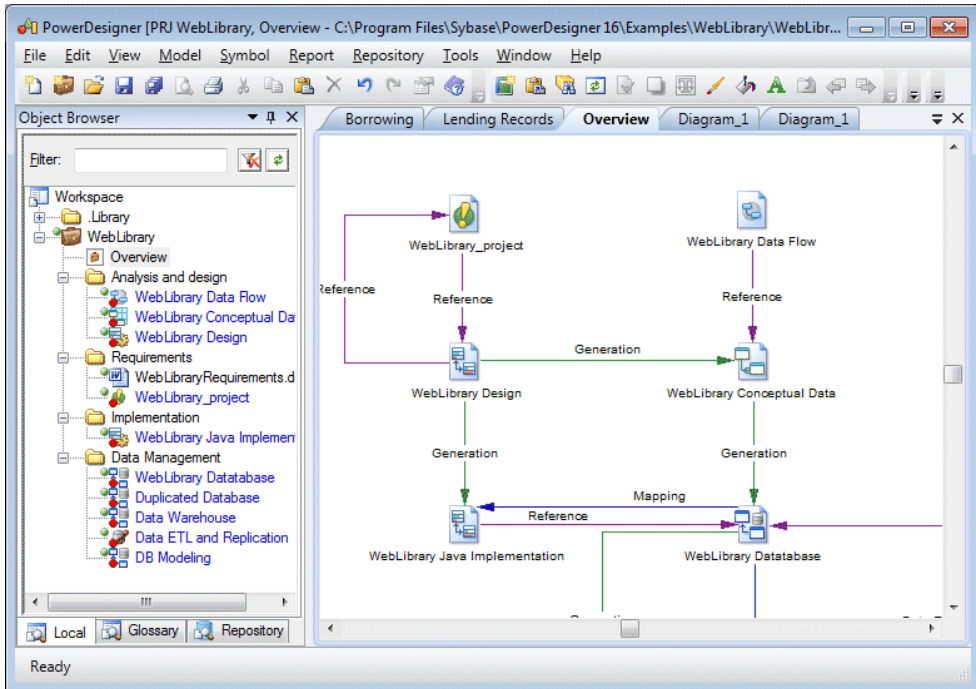
In the following example, the class Printer is located in the Peripheral Package of an OOM where each package is, by default, a separate namespace:



## CHAPTER 3 Projects and Frameworks

A project allows you to group together all the models and other types of documents you need for a particular modeling task, and save them as a simple entity in your repository.

A project can contain one or more project diagrams (see *Project Diagrams* on page 50), which show the connections between models and other documents:



Your project can also contain one or more framework diagrams and/or a framework matrix, which direct how your project must be modeled and list the documents that are needed (see *Completing Framework Diagrams and Matrices* on page 56).

You can create a project from scratch or from a template. PowerDesigner provides a set of predefined project templates, and you can also create your own (see *Project and Framework Templates* on page 78).

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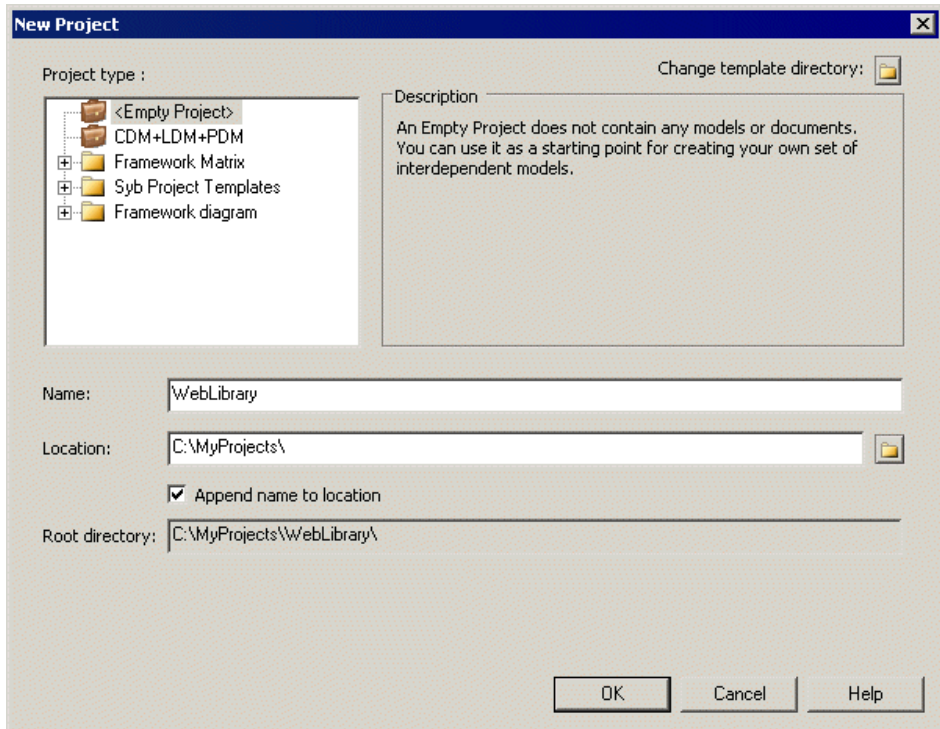
**Note:** Projects and framework diagrams and matrices are only available with Enterprise versions of PowerDesigner.

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## Creating a Project

Every project (.prj) contains at least one diagram, and any number of model or file documents. The project can also contain one or more framework diagrams, a framework matrix, and one or more dependency matrices.

1. Select **File > New Project** to open the New Project dialog box.



2. Select a type of project in the tree. You can choose to create:
  - An empty project.
  - A project based on a template (see *Project and Framework Templates* on page 78).  
Click the **Change Template Directory** tool to search for templates in another location.
3. Enter a project name and location, and select the **Append Name To Location** check box if you want to add the project name to the root directory.
4. Click **OK** to close the dialog box, and create the project.

The project opens. You can add models and other documents to your project (see *Adding Model and File Documents to a Project* on page 49 and *Completing Framework Diagrams and Matrices* on page 56).



## Adding Model and File Documents to a Project

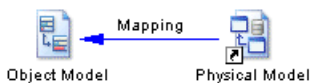
You can create models in your project and add existing models and files to it. Project documents are listed in the Browser and displayed as icons in the project diagram. You can open a model or file by double-clicking its icon in the diagram or in the Browser.

Creating Models	Adding Existing Models and Documents
<ul style="list-style-type: none"> <li>Click the <b>New Model</b> tool in the Toolbox, and click in the diagram to open the New Model dialog (see <i>Creating a Model</i> on page 9).</li> <li>Right-click a project or a project folder, select <b>New &gt; Model</b> to open the New Model dialog.</li> </ul>	<ul style="list-style-type: none"> <li>Click the <b>Add Project Document</b> tool in the Toolbox, and click in the diagram to open an Open dialog box. Browse to and select one or more documents and then click <b>Open</b>.</li> <li>Drag and drop one or more documents from the Browser, or the Windows Explorer to the project node in the Browser or to the project diagram.</li> </ul> <p><b>Note:</b> If you drag a folder with sub-folders from Windows Explorer, the hierarchy is preserved but, since projects are not synchronized with the file system, any files you subsequently add to these folders outside PowerDesigner will not be displayed in the Browser.</p>

The models contained in your project are visible in the Browser, beneath the project node and also in the List of Models available (when the project has context) by selecting **Model > Models**.

When you add existing documents from other locations to your project, they are listed under the project node in the Browser, but are not moved to the project directory. Such documents display a shortcut overlay on their symbols in the Browser and project diagrams to indicate that they are located outside the project folder, and their entries in the List of Models have the read-only **[I]nside Project** check box deselected.

In the following example, Object Model is inside the project and Physical Model is outside the project:



In order to profit from the convenience of the project as a container, we recommend that you create (or place) all its models and files inside the project directory in your file system.

To move a document from outside to inside the project, right-click its Browser entry or its symbol in the project diagram, and select **Move to Project Directory**. The file is moved to inside the project directory in your file system, the shortcut overlay disappears, and the **[I]nside Project** check box is selected in the List of Models.

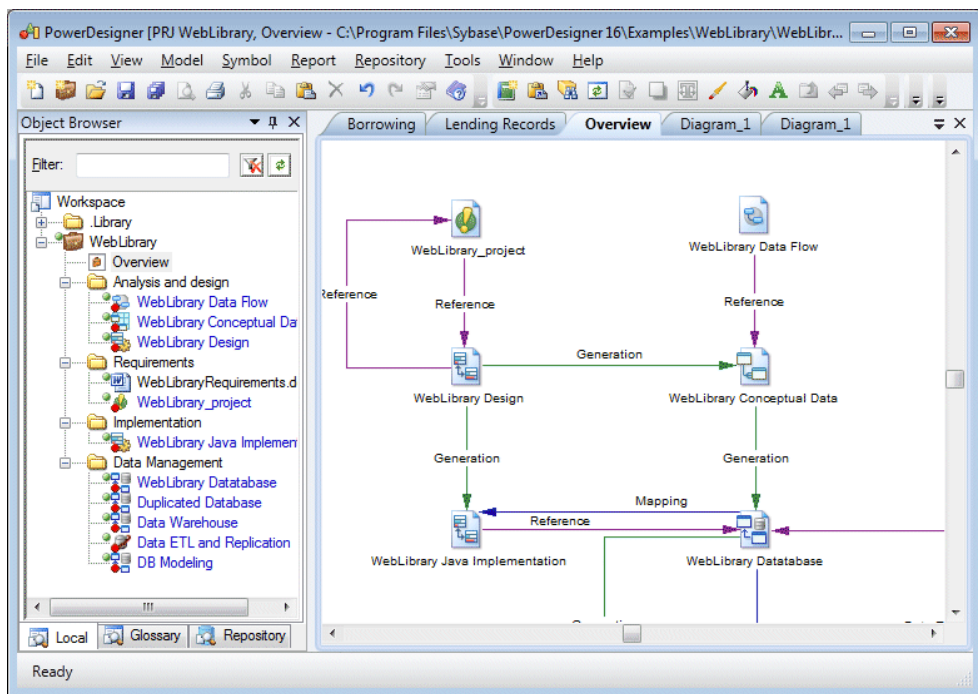
### Project Diagrams

A project diagram allows you to display project documents and the relationships between them.



You can create one or more project diagrams in an existing project to display different views of your project in any of the following ways:

- Right-click a project in the Browser, and select **New > Project Diagram**.
- Right-click the background of any project diagram, and select **Diagram > New Diagram > Project Diagram**.
- Select **View > Diagram > New Diagram > Project Diagram**.

In the following example, the models and other documents for the WebLibrary project are organized into sub-folders, and the connections between them (by reference, mapping, and generation) are displayed in the Main Diagram project diagram:



The following tools are available in the Toolbox of a project diagram:

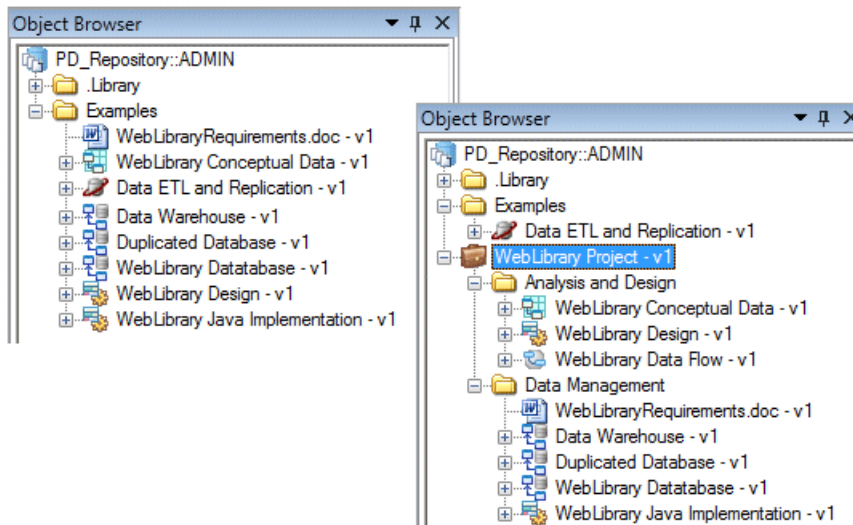
Tool	Description
	New Model – Creates a PowerDesigner model in the project.
	Add Project Document – Adds an existing document to the project, which can be: <ul style="list-style-type: none"> <li>• A PowerDesigner model (PDM, OOM, LDM etc.).</li> <li>• An external file (PDF, text file etc.).</li> </ul>
N/A	Dependency links, such as generation, mapping, reference, and file links, are automatically created between documents. These links cannot be created, but you may need occasionally to rebuild them (see <i>Rebuilding Dependency Links</i> on page 52).

## Converting a Set of Repository Documents into a Project

You can retrieve a set of documents checked into the repository and convert them into a project to benefit from the convenience of the project as a container.

1. In the Repository Browser, create a project root folder to contain the project documents.
2. [optional] Create project sub-folders to organize documents according to your needs.
3. Drag and drop repository documents into these folders.
4. Right-click the project root folder, and select **Convert to Project** to convert it and all its contents into a project.

In the following example, repository documents in the Examples folder are transformed into the WebLibrary Project:



### Opening Project Documents

Once you have added a PowerDesigner model to a project, you should only open the model within the context of the project, as links between it and any other models in the project are managed by the project file. If you attempt to open the model outside of the project, you will be prompted to cancel the operation, and to open the project instead.

You can open a project document in the context of its project by double-clicking it in:

- a framework matrix or diagram
- a project diagram
- the Browser under its parent project

Similarly, models that belong to a project should only be checked in and out of the repository via the project.

### Viewing Dependency Links

You can explore the details of any of the dependency links in your diagram by right-clicking it and selecting Show Dependencies.

Each type of link has its own viewer:

- Generation – displays the generation links between models in the Generation Links Viewer (see *The Generation Links Viewer* on page 450).
- Mapping – displays the mapping links between models in the Mapping Editor (see *The Mapping Editor* on page 477).
- Reference – displays the shortcuts and replications between models in the Shortcuts and Replications dialog box.

In the following example, right-clicking the reference link between Data ETL and Replication and Data Warehouse models opens the Shortcuts and Replications dialog box which displays Data Warehouse object shortcuts:



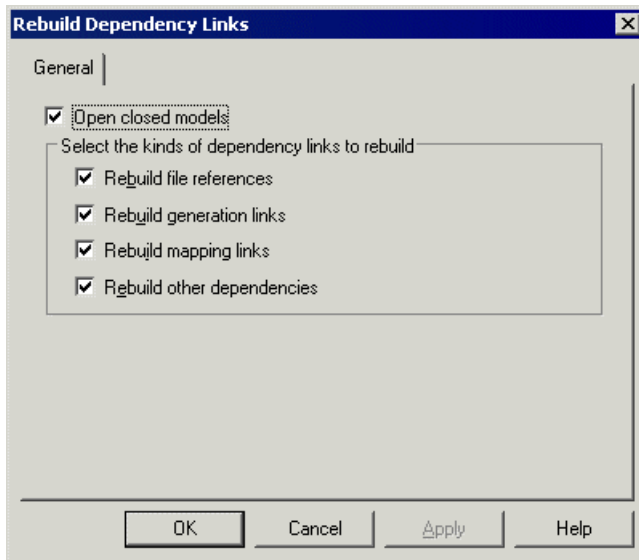
### Rebuilding Dependency Links

Dependency links are automatically generated in your project diagram when you add documents that are linked to each other by, for example, generation, mappings, shortcuts, etc.

Rebuilding dependency links can be useful to update:

- Links between closed models you add to your project.
- Links deleted by error in your diagram.

1. Select **Tools > Rebuild Dependency Links** to open the Rebuild Dependency Links dialog box.



2. [optional] Clear the Open closed models check box to rebuild only those links in a limited number of models.
3. Select the check boxes that correspond to the dependency links you want to rebuild.
4. Click OK to close the dialog box and return to the diagram. Any missing links are updated in the diagram.

## **Project and Framework Display Preferences**

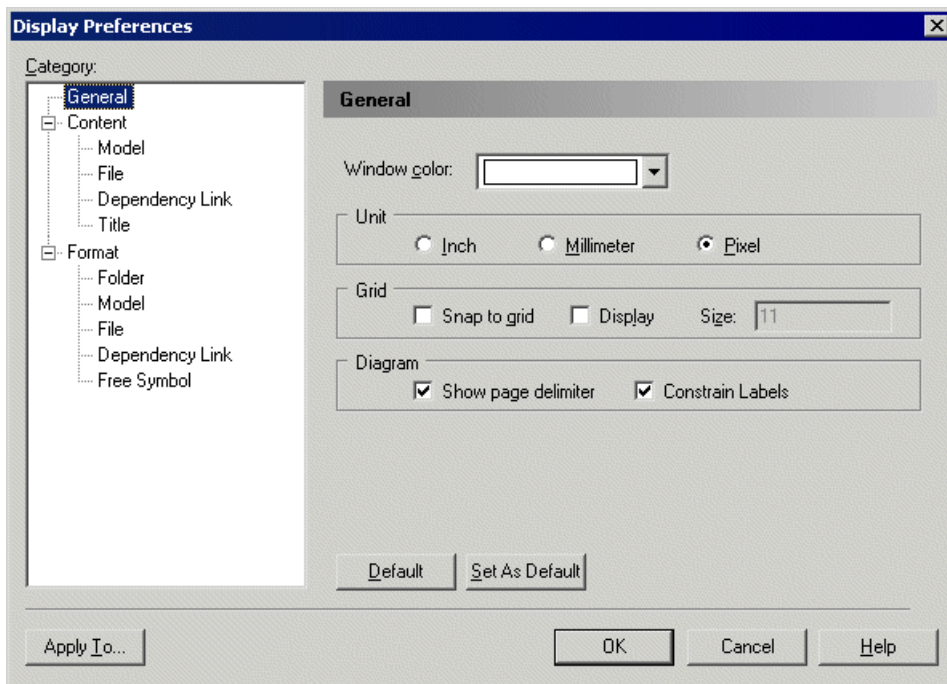
PowerDesigner display preferences allow you to customize the format of object symbols, and the information that is displayed on them.

To set project display preferences, select **Tools > Display Preferences** (or right-click the diagram background and select Display Preferences).

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**Note:** For information about changing the format of symbols, see *Format Display Preferences* on page 212. Note that only framework architects (see *Designing Framework Diagrams and Matrices* on page 63), are allowed to modify the framework diagram and matrix format display preferences (see *Symbol Format Properties* on page 193).

---



To set display preferences for a particular object, select it under the Content category. The following table lists the display preferences available. The objects available to be customized in the Display Preferences window depend upon the current diagram type.

Preference	Description
Code	Displays the code of the object.
Comment	Displays the comment of the object.
Completion status	[node and cell only] Displays a rectangle, which represents the work completion status according to the percentage entered in node and cell floating lists and property sheets.
Documents	[node and cell only] Displays the list of documents in the node or cell, instead of in floating lists.
Stereotype	Displays the stereotype of the object.
Type	[dependency link only] Displays the type of the dependency link, which can include mapping links, shortcut links, generation links, etc.

## Project Checks

You can check the validity of your project at any time by pressing **F4**, selecting **Tools > Check Project**, or right-clicking the diagram background, and selecting **Check Project**.

For information about using the Check Project Parameters dialog, see *Checking Models* on page 137.

### Model and File Checks

PowerDesigner provides default model checks to verify the validity of models and files.

Check	Description and Correction
Model and file location uniqueness	Multiple models or files cannot have the same location. <ul style="list-style-type: none"> <li>Manual correction - Delete unnecessary model or file.</li> <li>Automatic correction - None.</li> </ul>
Model location empty	[model only] There must be a path in the model document Location field. <ul style="list-style-type: none"> <li>Manual correction - Save the model to specify a model location.</li> <li>Automatic correction - None.</li> </ul>
External document URL not under a named path	A model or file is defined outside the project directory. <ul style="list-style-type: none"> <li>Manual correction - Right-click the model or file, and select <b>Move to Project Directory</b>.</li> <li>Automatic correction - None.</li> </ul>
Target models not in project	[model only] One or more target models of a model contained in the project is missing. <ul style="list-style-type: none"> <li>Manual correction - Add missing target model with appropriate dependency link.</li> <li>Automatic correction - Yes.</li> </ul>

### Framework Node and Cell Checks

PowerDesigner provides default model checks to verify the validity of framework diagram nodes and matrix cells.

Check	Description and Correction
Name/Code uniqueness	Object names must be unique in the namespace. <ul style="list-style-type: none"> <li>Manual correction - Modify the duplicate name or code.</li> <li>Automatic correction - Appends a number to the duplicate name or code.</li> </ul>

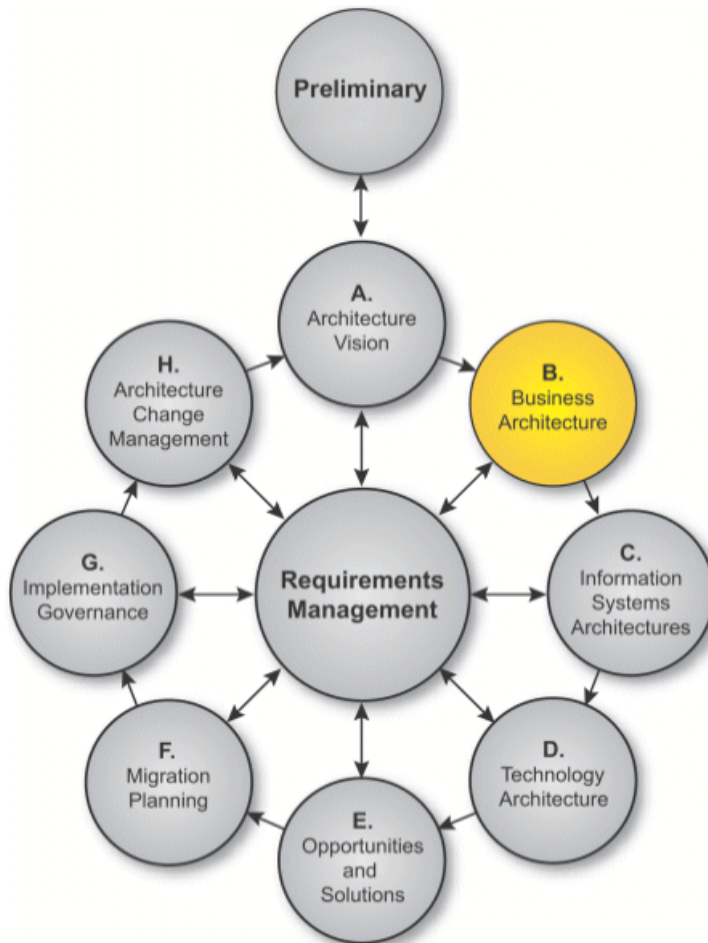
Check	Description and Correction
Documents not consistent with node/cell actions	<p>A document in a node and cell must be consistent with its source action.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the node's and cell's content according to its specified actions.</li> <li>Automatic correction - None</li> </ul>
Mandatory actions not executed	<p>A mandatory action in a node and cell must be executed.</p> <ul style="list-style-type: none"> <li>Manual correction - Execute the mandatory action.</li> <li>Automatic correction: None</li> </ul>

### Completing Framework Diagrams and Matrices

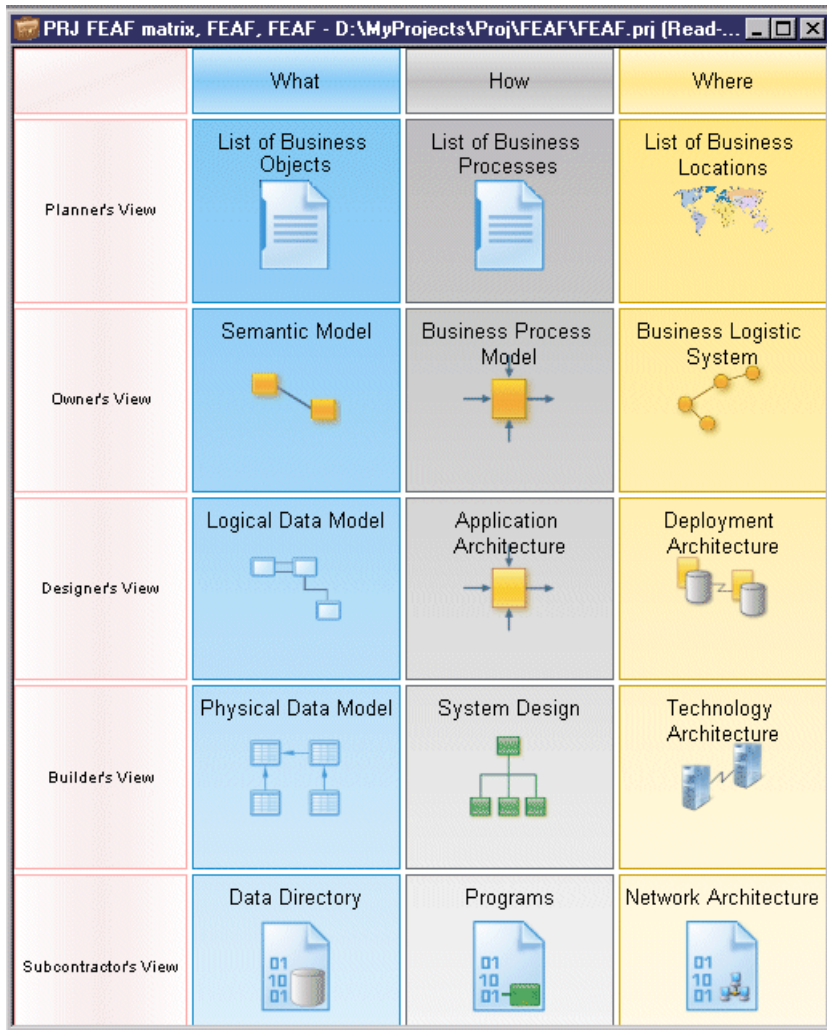
Your project may contain one or more framework diagrams and/or a framework matrix, which direct how your project should be built.

- A framework diagram - lets you model a framework with nodes and links, which you can style as necessary.





- Framework matrix - lets you model a framework in a matrix, in which columns usually represent various aspects of the enterprise that can be described or modeled, and the rows represent various viewpoints from which the aspects can be described. Each cell formed by the intersection of a column and a row represents an aspect of the enterprise modeled from a particular viewpoint.



PowerDesigner provides a set of predefined framework diagrams and matrices, and users with framework design rights can also create their own (see *Designing Framework Diagrams and Matrices* on page 63). You complete a framework diagram or matrix by creating (or adding existing) documents in nodes, cells, and additional areas according to predefined rules:

- Documents — can be of different types and can each be associated with multiple nodes, cells, and additional areas:
  - Model – a PowerDesigner model, such as a BPM or a PDM, created from scratch, based on a template, or generated from another model.
  - Diagram – a PowerDesigner model diagram, such as an OOM use case diagram.

- Dependency matrix – a grid that displays the links between model objects (see *Dependency Matrices* on page 180).
- List – a list of PowerDesigner model objects, such as BPM processes, or PDM tables.
- File – an external file, such as a .doc or .txt file.
- Nodes and cells [when active] — must be completed by particular kinds of documents.
- Additional areas [framework matrix only] — can be defined outside of the grid (for example, the global view in the FEAF framework matrix that is created at the end of the enterprise architecture implementation).

## **Navigating in Framework Diagrams and Matrices**

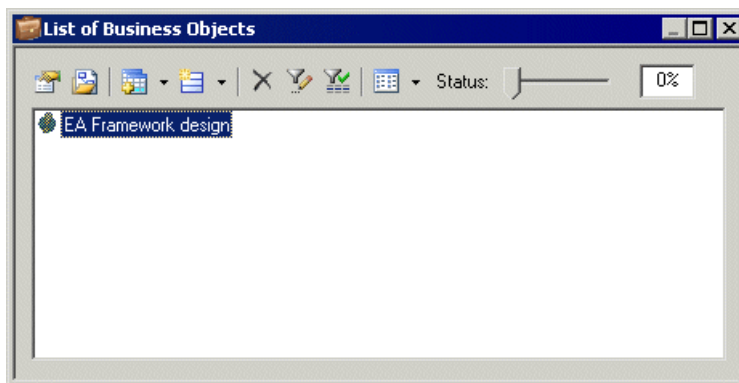
You can interact with framework diagram and matrix elements using various mouse actions.

- Hover over a framework element – to display its name and any comment.
- Click a node or cell – to open a floating list, which lets you manage the documents attached to the node or cell (see *Working with Floating Lists* on page 62).
- Right-click a node or cell – to opens contextual menu (see *Working with the Framework Node and Cell Contextual Menu* on page 63).
- Double-click a framework matrix element [framework architects only] – to open the property sheet of the element (see *Framework Matrix Properties* on page 83).

## **Attaching a Document to a Framework Node or Cell**

You can attach new (or existing) documents to each node of a framework diagram and cell of a framework matrix.

1. Open the framework diagram or matrix by double-clicking its Browser entry.
2. Click the node or cell to which you want to add the document to open its floating list, which displays the documents attached to it.



3. Click one of the following tools:
  - **New Document** – to create a document of the specified kind:

- Model [from scratch or based on a template] – creates the model and opens it in the diagram window.
- Model [generated from another PowerDesigner model] – opens the *Model Generation Options* dialog box to let you create a model (see *Generating Models* on page 435).
- Diagram – opens a model selection dialog box to let you select a new or existing model to create the diagram.
- Dependency matrix – opens a model selection dialog box to let you select a new or existing model to create the dependency matrix (see *Dependency Matrices* on page 180).
- List – opens the List of *Objects* dialog box to let you create objects in a new or existing model.
- File – opens a standard Save As dialog box to let you enter a file name. Click Save to open the file in the application corresponding to the file extension.
- **Add Document**, and select:
  - **Attach Project Document** – to add documents already in the project. Select the type of document you want to attach.
  - **Add Document** – to add documents from outside the project. Select the type of document you want to add.

---

**Note:** You can also drag a project document from the Browser and drop it onto a node, a cell or a floating list, or right-click a node or a cell, and select the New Document, Attach Project Document, and Add Document commands. Documents can also be moved from one node or cell to another.

---

4. [optional – New Document only] Complete the creation of the new document by, for example, adding objects to the model or diagram, or entering text in the file, etc.

The document is displayed in the floating list.

### **Example: Creating a PDM from a Cell's Floating List**

In this example, we create a PDM, which has been specified as a requirement to complete a framework matrix cell.

1. Click a cell to open its floating list, which displays the documents attached to the cell.
2. Click the **New Document** tool, and then select **New PDM** to create the required PDM.

The new PDM document is displayed in the cell, and in the Browser in the folder specified by the framework architect.

For information about specifying a model as a requirement to complete a framework node or cell, see *Example: Specifying a Model Action* on page 66.

**Example: Creating a List of Processes from a Node's Contextual Menu**

In this example, we create a list of BPM processes, which has been specified as a requirement to complete a framework diagram node.

1. Right-click a node, and select **New > Document > List of processes** to open the List of Processes dialog.
2. Create an appropriate number of processes in the list, entering a name for each, and then click **OK** to close the dialog box.

The list of processes document is displayed in the node, and in the Browser under a BPM node in the folder specified by the framework architect.

For information about specifying a list as a requirement to complete a framework node or cell, see *Example: Specifying a List Action* on page 68.

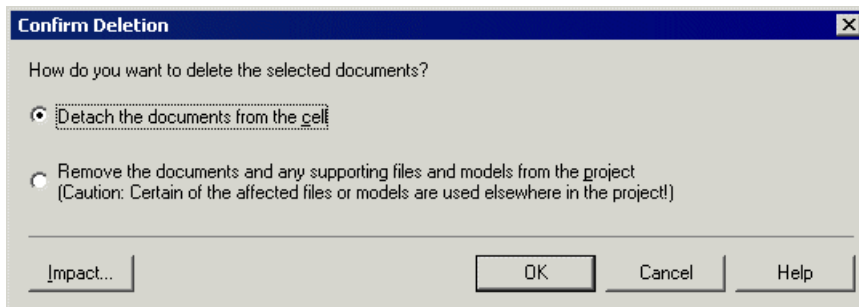
**Deleting Documents from Framework Nodes and Cells**

You can delete documents from framework nodes and cells. You can choose to simply detach a document from the node or cell or completely remove it from the project.

1. Click a node or cell to open its floating list, select one or more documents in the list, and then click the **Delete** tool.

Alternatively, select one or more documents in a node or cell and press the **Del** key or right-click a document and select **Edit > Delete**.

The Confirm Deletion dialog box is displayed.











2. Choose one of the following delete options:
  - Detach the document from the node or cell - the document is detached from the node or cell but remains available in the project to be used elsewhere.
  - Remove the document and any supporting file or model from the project - their deletion from the project may affect files or models used elsewhere in the project.
3. Click **OK** to close the dialog box and confirm the deletion.

## Working with Floating Lists

You open a floating list by clicking a framework diagram node or matrix cell.

**Note:** Floating lists are not available when you select the Documents display preference (see *Project and Framework Display Preferences* on page 53).

Floating lists contain the following tools to let you manage project documents in the framework diagram and matrix:

Tool	Description
	Properties – opens the property sheet of the selected document.
	Open Document – opens the selected document.
	Add Document – contains the following tools: <ul style="list-style-type: none"> <li>Attach Project Document – lets you select a document of the specified kind from inside the project.</li> <li>Add Document – lets you select a document of the specified kind from outside the project.</li> </ul>
	New Document – creates a document of the specified kind.
	Delete – deletes the selected document from the node and cell. You can choose to: <ul style="list-style-type: none"> <li>Detach the document from the node and cell.</li> <li>Remove the document and any supporting file or model from the project.</li> </ul> For information see <i>Deleting Documents from Framework Nodes and Cells</i> on page 61.
	Customize Columns and Filter – allows the definition of filter expression on the columns of the floating list (see <i>Customizing Object List Columns and Filtering Lists</i> on page 113).
	Enable/Disable Filter – enables or disables the filter.
	Views – controls the display of documents in the floating list. You can choose between: <ul style="list-style-type: none"> <li>Large Icons – displays documents as large icons.</li> <li>List – displays documents in multiple columns to optimize space.</li> <li>Details – displays documents in a grid, which can be filtered.</li> </ul>
Status	Status – indicates the percentage of work completed in the node and cell.

## **Working with the Framework Node and Cell Contextual Menu**

The contextual menu available on framework nodes and cells allows you to perform various actions.

The contextual menu of a framework node and cell contains the following commands. For information about the additional commands available only in Framework Design Mode, see *Styling Framework Nodes and Cells* on page 78):

Command	Description
List of Documents	Opens the node's or cell's floating list.
New Document	Creates a document of the specified kind in the node or cell. An action must be specified in the node or cell in order for this command to be available.
Attach Project Document	Attaches a document from inside the project to the node or cell.
Add Document	Adds a document from outside the project to the node or cell.

## **Designing Framework Diagrams and Matrices**

Framework architects (users who have selected the Authorize Framework Design user profile when installing PowerDesigner) can create, design, and delete framework diagrams and matrices in projects, by enabling the Framework Design Mode.

Select **Tools > Framework Design Mode**.

In the framework matrix, you can alternately right-click the framework matrix top-left corner, and select **Framework Design Mode**. The design icon displays in the matrix top-left corner.

In the framework diagram, the Toolbox displays in the diagram.

## **Creating a Framework Diagram**

Framework architects can create one or more framework diagrams to guide their modeling teams through building a project. You can specify actions for each node in the framework diagram that control what kind of document (model, diagram, model objects list etc.) must be attached to them.

1. Right-click a project in the Browser, and select **New > Framework Diagram** to open the framework diagram property sheet.
2. Enter a name for the framework diagram on the General tab, and click **OK** to close the property sheet.
3. Click the **Node** tool in the Toolbox, click in the diagram, and create an appropriate number of framework diagram nodes.

4. Click the **Link** tool in the Toolbox, click in the diagram, and create an appropriate number of framework diagram links between the nodes to express connections between them.
5. [optional] Decompose one or more nodes to analyze them in more detail (see *Decomposing a Framework Node* on page 64).
6. Create actions for each node to specify the types of documents that your modelers can attach to the node (see *Specifying Framework Node and Cell Actions* on page 65).
7. [optional] Select **File > Save As Template** to open the Project Template Wizard, and convert the project containing your framework diagrams into a template to allow it to be reused as the basis for future projects (see *Project and Framework Templates* on page 78).

### **Decomposing a Framework Node**

You can decompose one or more nodes in the framework diagram to analyze them in more detail. The decomposed node has its own sub-diagram, which models the links between its sub-nodes. Sub-nodes can, themselves, be decomposed into further sub-nodes, and so on until you obtain a sufficient level of detail.

You can decompose a node in a framework diagram in any of the following ways:

- Press **ctrl** and double-click the node symbol (this will open the sub-node directly)
- Open the property sheet of the node and, on the General tab, select the **Composite** check box.

Decomposed node symbols in a framework diagram carry a plus-sign symbol to indicate that they contain further detail

The sub-diagram of the decomposed node is empty at first. You have to create the appropriate number of nodes and links between them to show their connections (see *Creating a Framework Diagram* on page 63).

### **Creating a Framework Matrix**

Framework architects can create a framework matrix to guide their modeling teams through building a project. You can specify actions for each cell in the framework matrix that control what kind of document (model, diagram, model objects list etc.) must be attached to them.

1. Right-click a project in the Browser, and select **New > Framework Matrix Diagram** to open the framework matrix property sheet, or right-click the background of any project diagram, and select **Diagram > New Diagram > Framework Matrix**, or select **View > Diagram > New Diagram > Framework Matrix**.

---

**Note:** You can create only one framework matrix per project.

---

2. Enter a name for the framework matrix on the General tab (see *Framework Matrix Properties* on page 83).



3. Click the **Columns** tab, and create an appropriate number of framework matrix columns, entering a name for each.
4. Click the **Rows** tab, and create an appropriate number of framework matrix rows, entering a name for each.
5. [optional] Click the **Additional Areas** tab, and create an appropriate number of additional areas, which will be displayed outside the main matrix grid, entering a name for each.
6. Click **OK** to close the property sheet and create your framework matrix.
7. Create actions for each cell to specify the types of documents that your modelers can attach to the cell (see *Specifying Framework Node and Cell Actions* on page 65).
8. [optional] Select **File > Save As Template** to open the New Template Wizard, and convert the project containing your framework matrix into a template to allow it to be reused as the basis for future projects (see *Project and Framework Templates* on page 78).

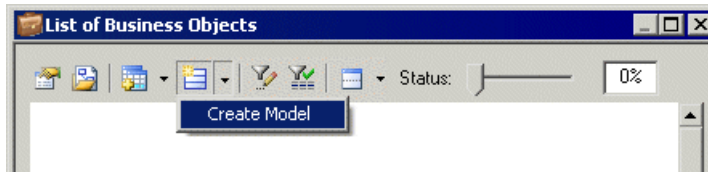
## Specifying Framework Node and Cell Actions

Actions control the types of documents that can be attached to nodes and cells when completing framework diagrams and matrices. You can specify one or more action types per node and cell.

1. Double-click a node or a cell to open its property sheet.
2. On the **General** tab, enter a node or a cell name, and any other appropriate properties (see *Framework Node, Cell and Additional Area Properties* on page 84).
3. Click the **Actions** tab, and click the **Add a Row** tool to create a new action.
4. Double-click the action to open its property sheet and, on the **General** tab, enter an action name, and any other appropriate properties (see *Framework Action Properties* on page 86).
5. Click the **Detail** tab, and select one of the following types of actions as a means to populate the node or cell:
  - **Model** – a PowerDesigner model (see *Example: Specifying a Model Action* on page 66).
  - **Diagram** – a PowerDesigner model diagram (see *Example: Specifying a Diagram Action* on page 67).
  - **List** – a list of PowerDesigner model objects (see *Example: Specifying a List Action* on page 68).
  - **Model Generation** – a PowerDesigner model generated from another model (see *Example: Specifying a Model Generation Action* on page 70).
  - **Object Generation** – a PowerDesigner model populated with one type of objects generated from another model (see *Example: Specifying an Object Generation Action* on page 71).
  - **File** – an external file (see *Example: Specifying a File Action* on page 72).

- **Matrix** – a PowerDesigner dependency matrix showing links between model objects (see *Example: Specifying a Matrix Action* on page 74).
  - **Script** - a VB script that can define any scriptable action (see *Example: Specifying a Script Action* on page 75).
6. Specify any other appropriate properties to refine the action.
  7. Click **OK** to close the action and node or cell property sheets and return to the framework diagram or matrix.

The action is now available for use by framework users (see *Attaching a Document to a Framework Node or Cell* on page 59). Note that only fully-defined actions are available for selection.



### **Example: Specifying a Model Action**

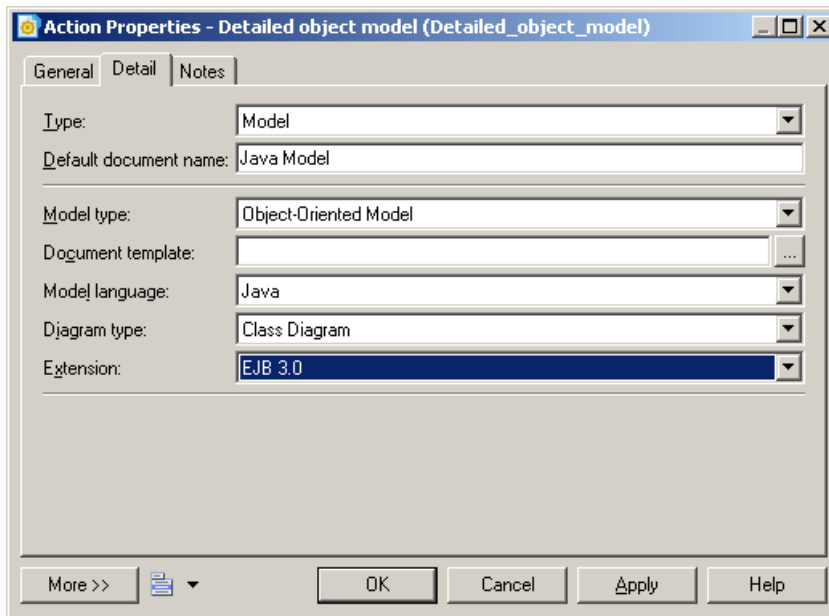
The Model action lets a framework user (add or) create one or more models of the specified kind in the node or cell. The model will be displayed in the Browser under the project node and as a document in the node or cell to which it has been attached.

In the following example, we will specify an action in a framework diagram node that enables the user to create one or more Java OOMs with the EJB 3.0 xem attached.

1. Double-click a framework node to open its property sheet, and click the **Actions** tab.
2. Click the **Add a Row** tool to create a new action, and double-click it to open its property sheet.
3. On the **General** tab, enter "*Detailed object model*" in the Name field.
4. Select the **Multiple** check box to specify that more than one OOM can be attached to the node.
5. Click the **Detail** tab, and specify the following properties:

Property	Select or enter
Type	<i>Model</i>
Default document name	<i>Java Model</i>
Model type	<i>Object-Oriented Model</i>
Document template	Leave blank
Model language	<i>Java</i>
Diagram type	<i>Class Diagram</i>

Property	Select or enter
Extension	<i>EJB3.0</i>



6. Click OK to close the action and node property sheets and return to the framework diagram.

The Model action is now available for use by framework diagram users (see *Attaching a Document to a Framework Node or Cell* on page 59).

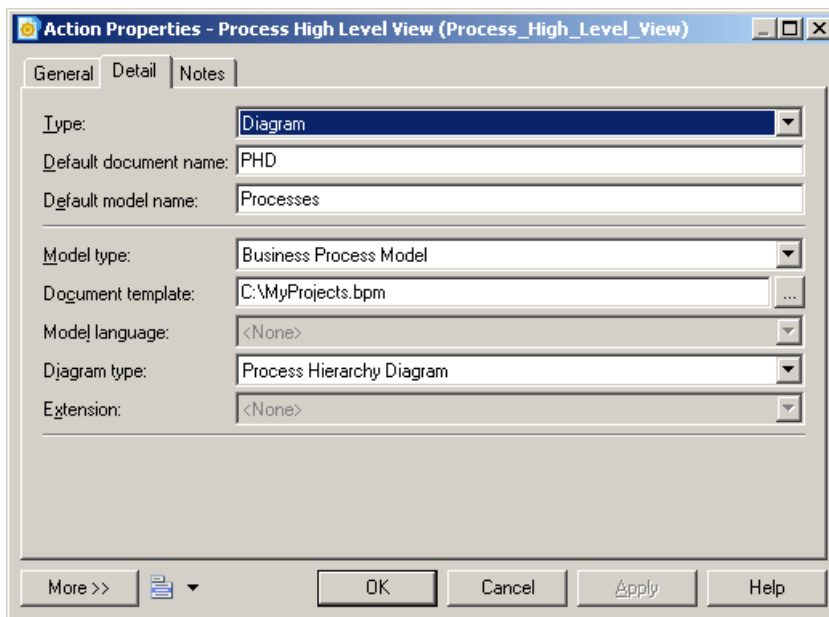
### **Example: Specifying a Diagram Action**

The Diagram action lets a framework user (add or) create one or more diagrams of the specified kind in the node or cell. The diagram will be displayed in the Browser under an existing or new model node and as a diagram in the node or cell to which it has been attached.

In the following example, we will specify an action in a framework matrix cell that enables the user to create exactly one BPM process hierarchy diagram from a previously defined template.

1. Double-click a framework cell to open its property sheet, and click the **Actions** tab.
2. Click the **Add a Row** tool to create a new action, and double-click it to open its property sheet.
3. On the **General** tab, enter "*Process high level view*" in the Name field.
4. Clear the **Multiple** check box to specify that exactly one BPM process hierarchy diagram can be attached to the cell.
5. Click the **Detail** tab, and specify the following properties:

Property	Select or enter
Type	<i>Diagram</i>
Default document name	<i>PHD</i>
Default model name	<i>Processes</i>
Model type	<i>Business Process Model</i>
Document template	Click the Ellipsis button to select the <i>Orders.bpm</i> template. For information about creating model templates see <i>Model Templates</i> on page 11.
Diagram type	<i>Business Process Diagram</i>



- Click **OK** to close the action and cell property sheets and return to the framework matrix.

The Diagram action is now available for use by framework matrix users (see *Attaching a Document to a Framework Node or Cell* on page 59).

### Example: Specifying a List Action

The List action lets a framework user (add or) create one or more model object lists of the specified kind in the node or cell. The list will be displayed in the Browser under the appropriate model node and as a document in the node or cell to which it has been attached.

In the following example, we will specify an action in a framework diagram node that requires the user to create at least one list of PDM clusters.

1. Double-click a framework node to open its property sheet, and click the **Actions** tab.
2. Click the **Add a Row** tool to create a new action, and double-click it to open its property sheet.
3. On the **General** tab, enter "*List of PDM clusters*" in the Name Field.
4. Select the **Mandatory** check box to specify that at least one list of PDM clusters must be attached to the node.
5. Click the **Detail** tab, and specify the following properties:

Property	Select or enter
Type	<i>List</i>
Default document name	<i>List of clusters</i>
Default model name	<i>Clusters</i>
Model type	<i>Physical Data Model</i>
Document template	Leave blank
Model language	<i>ORACLE Version 11g</i>
Extension	<i>&lt;none&gt;</i>
List object type	<i>PDM::Cluster</i> (click the <b>Select Object</b> tool, navigate to Oracle Version 11g, and select the Cluster node)

**Action Properties - List of Clusters (List\_of\_Clusters)**

General Detail Notes

Type: List

Default document name: List of Clusters

Default model name: Clusters

Model type: Physical Data Model

Document template:

Model language: ORACLE Version 11g

Extension: <None>

List object type: PDM::Cluster

More >> OK Cancel Apply Help

6. Click **OK** to close the action and node property sheets and return to the framework diagram.

The List action is now available for use by framework diagram users (see *Attaching a Document to a Framework Node or Cell* on page 59).

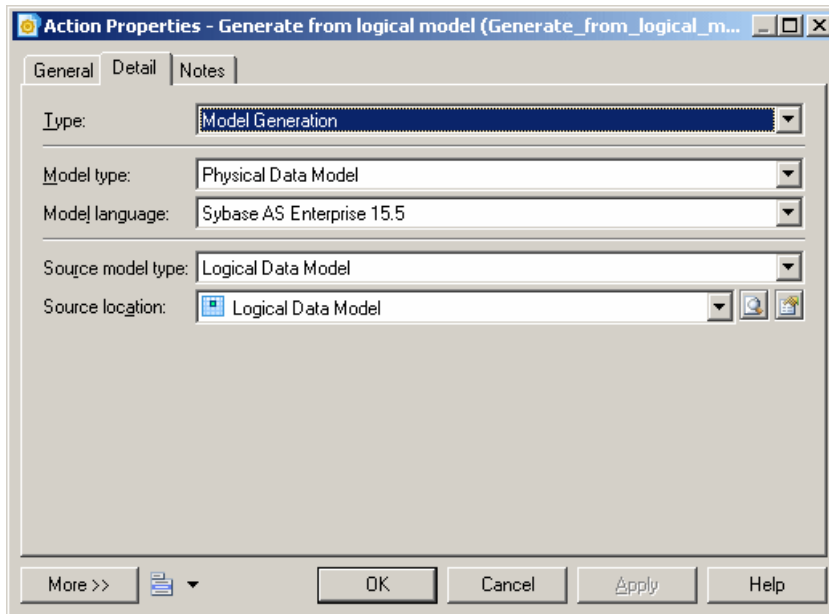
### **Example: Specifying a Model Generation Action**

The Model Generation action lets a framework user generate one or more models from another model. The generated model will be displayed in the Browser under the project node and as a document in the node or cell to which it has been attached.

In the following example, we will specify an action in a framework matrix cell that enables the user to generate exactly one Sybase AS Enterprise 15.0.2 PDM from a Logical Data Model.

1. Double-click a framework cell to open its property sheet, and click the **Actions** tab.
2. Click the **Add a Row** tool to create a new action, and double-click it to open its property sheet.
3. On the **General** tab, enter *Generate from Logical Model* in the Name field.
4. Clear the **Multiple** check box to specify that exactly one generated PDM can be attached to the cell.
5. Click the **Detail** tab, and specify the following properties:

Property	Select or enter
Type	<i>Model Generation</i>
Model type	<i>Physical Data Model</i>
Model language	<i>Sybase AS Enterprise 15.5</i>
Source model type	<i>Logical Data Model</i>
Source location	<i>Logical data model</i>



6. Click **OK** to close the action and cell property sheets and return to the framework matrix.

The Model Generation action is now available for use by framework matrix users (see *Attaching a Document to a Framework Node or Cell* on page 59).

### **Example: Specifying an Object Generation Action**

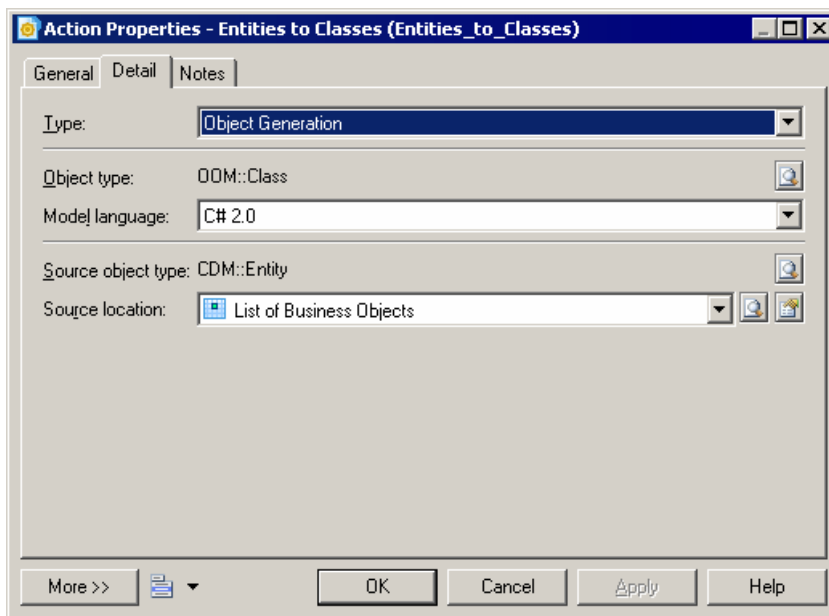
The Object Generation action lets a framework user generate objects from one model to another. The generated model will be displayed in the Browser under the project node and as a document in the node or cell to which it has been attached.

In the following example, we will specify an action in a framework matrix cell that enables the user to generate exactly one Java OOM containing classes from a list of entities.

1. Double-click a framework cell to open its property sheet, and click the **Actions** tab.
2. Click the **Add a Row** tool to create a new action, and double-click it to open its property sheet.
3. On the **General** tab, enter `Classes` from `Entities` in the **Name** field.
4. Clear the **Multiple** check box to specify that exactly one generated OOM can be attached to the cell.
5. Click the **Detail** tab, and specify the following properties in the fields:

Property	Select or enter
Type	<i>Object Generation</i>

Property	Select or enter
Object type	Click the <b>Select Object</b> tool, navigate to <b>PdOOM &gt; Class</b> in the dialog, and click <b>OK</b> to select it.
Model language	<i>C# 2.0</i>
Source object type	Click the <b>Select Object</b> tool, navigate to <b>PdCDM &gt; Entity</b> in the dialog, and click <b>OK</b> to select it.
Source location	<i>List of Business Objects</i>



- Click **OK** to close the action and cell property sheets and return to the framework matrix.

The Object Generation action is now available for use by framework matrix users (see *Attaching a Document to a Framework Node or Cell* on page 59).

### **Example: Specifying a File Action**

The File action lets a framework user (add or) create one or more files of the specified kind in the node or cell. The file will be displayed in the Browser under the project node and as a document in the node or cell to which it has been attached.

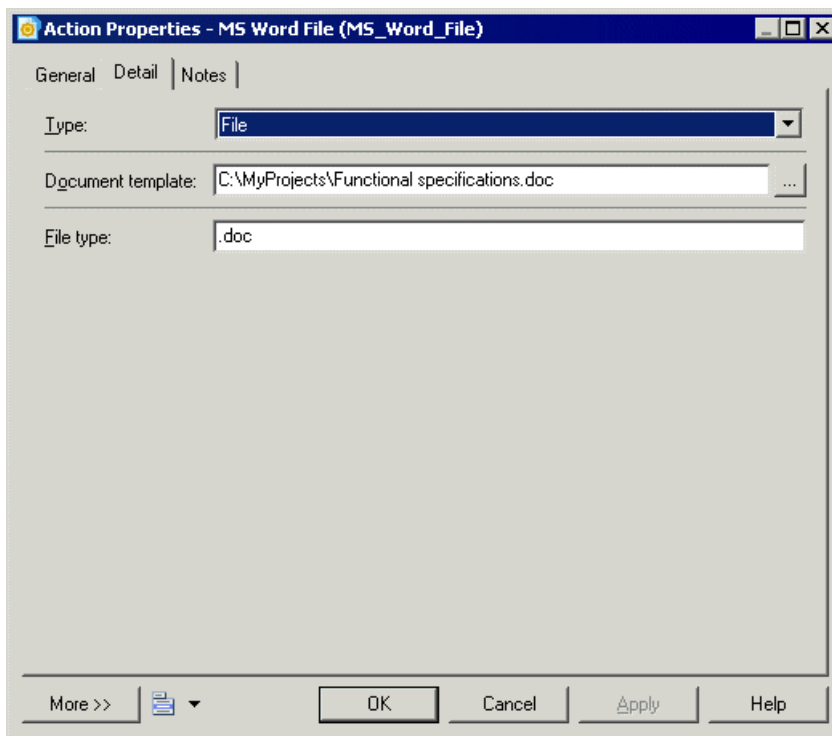
In the following example, we will specify an action in a framework diagram node that requires the user to create at least one MS Word file from a predefined template.

- Double-click a framework node to open its property sheet, and click the **Actions** tab.



2. Click the **Add a Row** tool to create a new action, and double-click it to open its property sheet.
3. On the **General** tab, enter "*MS Word File*" in the Name field.
4. Select the **Mandatory** check box to specify that at least one MS Word file must be attached to the node.
5. Click the **Detail** tab, and specify the following properties in the fields:

Property	Select or enter
Type	<i>File</i>
Document template	Click the <b>Ellipsis</b> button to select the <i>Functional specifications.doc</i> template.
File type	<i>.doc</i>



6. Click **OK** to close the action and node property sheets and return to the framework diagram.

The File action is now available for use by framework diagram users (see *Attaching a Document to a Framework Node or Cell* on page 59).

**Example: Specifying a Matrix Action**

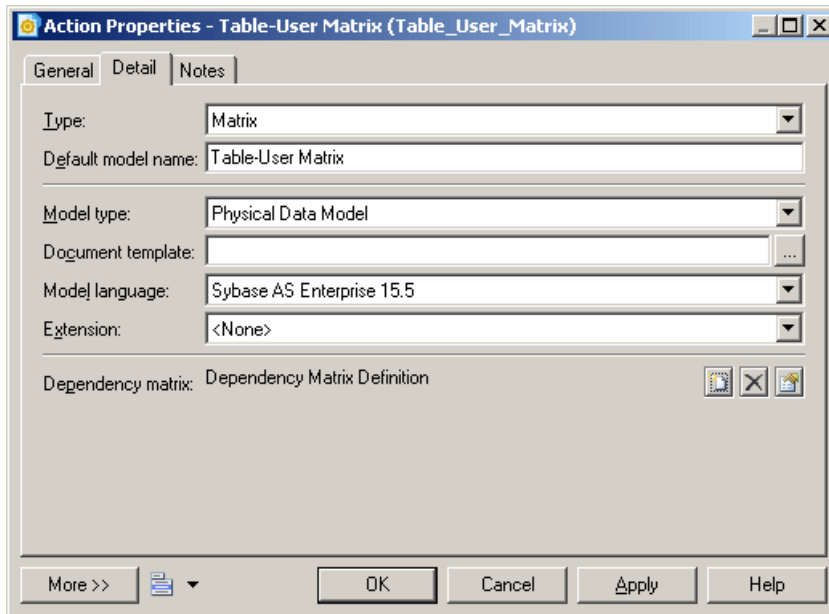
The Matrix action lets a framework user (add or) create one or more dependency matrices of the specified kind in the node or cell. The dependency matrix will be displayed in the Browser under the project node and as a document in the node or cell to which it has been attached.

In the following example, we will specify an action in a framework matrix cell that enables the user to create exactly one dependency matrix between PDM tables and users connected by the Owner dependency.

1. Double-click a framework cell to open its property sheet, and click the **Actions** tab.
2. Click the **Add a Row** tool to create a new action, and double-click it to open its property sheet.
3. On the **General** tab, enter `Table-User Matrix` in the **Name** field.
4. Clear the **Multiple** check box to specify that only one dependency matrix can be attached to the cell.
5. Click the **Detail** tab, and specify the following properties:

Property	Select or enter
Type	<i>Matrix</i>
Default model name	<i>Table-User Matrix</i>
Model type	<i>Physical Data Model</i>
Document template	Leave blank
Model Language	<i>Sybase AS Enterprise 15.5</i>
Extension	<i>&lt;none&gt;</i>
Dependency matrix	Click the <b>Create</b> tool to open the dependency matrix property sheet and specify the following values: <ul style="list-style-type: none"> <li>• Matrix rows object type – <i>Table</i></li> <li>• Matrix columns object type – <i>User</i></li> <li>• Matrix cells dependency – <i>Owner</i></li> </ul>

6. Click **OK** to close the dependency matrix property sheet, and return to the action property sheet.



7. Click **OK** to close the action and cell property sheets and return to the framework matrix.

The Matrix action is now available for use by framework matrix users (see *Attaching a Document to a Framework Node or Cell* on page 59).

### **Example: Specifying a Script Action**

The Script action lets a framework user execute a script in the node or cell. You can use the script to create a project document and attach it to the node or cell.

In the following example, we will specify an action in a framework diagram node that enables the user to execute a script that generates a model from another model. The result of this example is the same as that of a Generation action, but the script is intended to demonstrate the possibilities that you can script in your own projects. You could, for example, write a script to connect to a live database and reverse engineer it into a cell. For information about writing scripts for use in your models and projects, see *Customizing and Extending PowerDesigner > Extension Files > Methods (Profile)*.

Before you can specify a script action, you have to create a method script on the FrameworkAction metaclass in an extension, and then attach it to your project. In this case, the following script is called `GenerateModel`, and will generate a PDM:

```
Sub %Method%(obj)
    ' This is a sample method that can be used in a script action
    ' It generates a PDM from a source cell CDM and attaches it to the
    ' current cell
    ' Steps:
    ' 1- Get the source cell: found by its code "mySourceCell"
```

```

' 2- Get the source model: first document in the source cell
' 3- Generate a PDM from the source model
' 4- Attach the generated model to the current cell
' 5- Set current action as source action for the new document
' => That will prevent generating twice if the action is not
multiple

    If obj Is Nothing Then Exit Sub

    Dim sourceCell, targetCell, modelDoc, sourceModel, targetModel

    ' The script is defined on the action so the current cell is simply
the action parent
    Set targetCell = obj.Parent

    ' First check if we can execute the action on the current cell
' for non multiple actions, the CanExecute should return true only
the first time
    If obj.CanExecute(targetCell) Then
        ' Get Source cell
        Set sourceCell = FindCellByCode(targetCell.Parent,
"mySourceCell") ' See function code below End Sub statement

        ' Get source model (supposed to be the first in its artifact
document list)
        Set modelDoc = sourceCell.ArtifactDocuments.Item(0)
        Set sourceModel = modelDoc.TargetModelObject

        ' Generate PDM Model
        Set targetModel = sourceModel.GenerateModel (Nothing,
PdPDM.cls_Model)

        ' Attach generated model to current cell
        Set modelDoc = targetModel.SourceModelDocument
        targetCell.AttachDocument(modelDoc)

        ' Set current action as source for the new model document
        obj.SetAsSource(modelDoc)
    Else
        ' In this sample, the action is supposed to be non-multiple
        ' Therefore, CanExecute fails if it's already a source action
for an existing document
        output "The action has already been executed"
    End If
End Sub

' FindCellByCode function (Global Script function):

Function FindCellByCode (fmx, Code)
    Set FindCellByCode = Nothing
    Dim Cell
    For Each Cell In fmx.cells
        If Cell.Code = Code Then
            Set FindCellByCode = Cell
            Exit For
        End If
    Next Cell
End Function

```

```

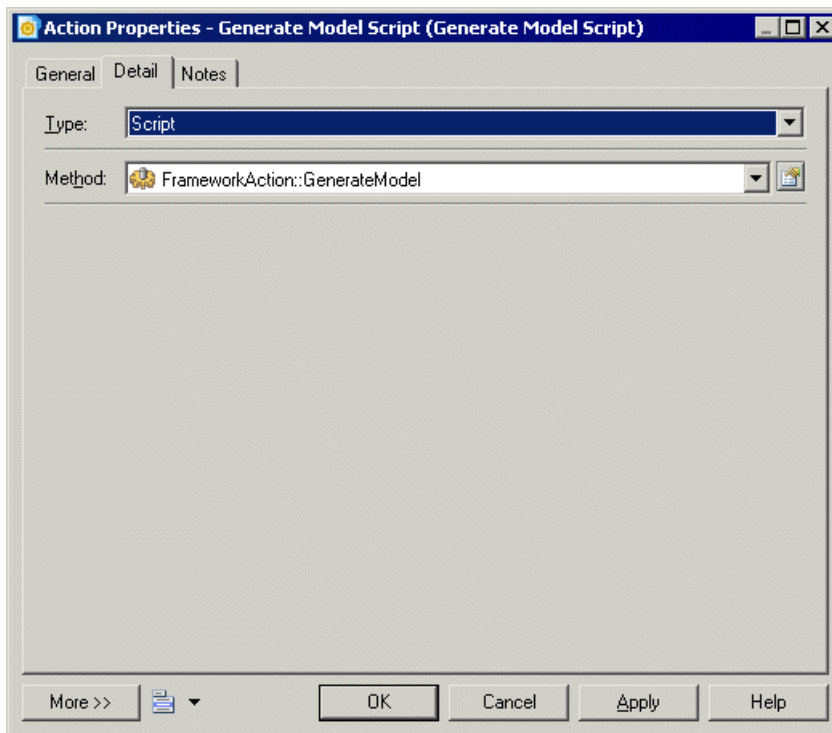
    End If
  Next
End Function

>>

```

1. Double-click a framework node to open its property sheet, and click the **Actions** tab.
2. On the **General** tab, enter `Generate Model Script` in the Name field.
3. Clear the **Multiple** check box to specify that exactly one generated model can be attached to the node.
4. Click the **Detail** tab, and specify the following properties in the fields:

Property	Select
Type	Script
Method	GenerateModel



5. Click **OK** to close the action and node property sheets and return to the framework diagram.

The Script action is now available for use by framework diagram users (see *Attaching a Document to a Framework Node or Cell* on page 59).

### **Styling Framework Nodes and Cells**

Framework architects have access to additional commands that allow them to change the format of framework nodes and cells.

Command	Description
Format	Opens the Symbol Format dialog box to let you specify line and fill colours, fonts and formatting for each textual element, and an image for the node or cell (see <i>Symbol Format Properties</i> on page 193).
Change Image	Opens the Select Image dialog box to let you insert an image in the node or cell (see <i>Browsing for Images</i> on page 200).
Get Format	Copies the format of the selected node or cell for pasting in other nodes or cells.
Apply Format	Pastes a previously copied node or cell format into the selected node or cell.
Properties	Opens the property sheet of the selected node or cell.

For information about the standard commands available outside design mode, see *Working with the Framework Node and Cell Contextual Menu* on page 63.

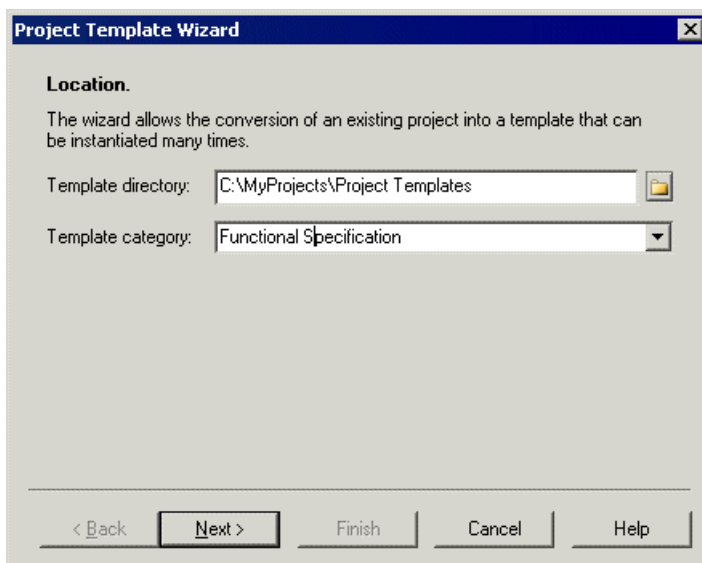
### **Project and Framework Templates**

A project template can provide predefined content, rules, and formatting for your project, and can also include a framework matrix or framework diagram.

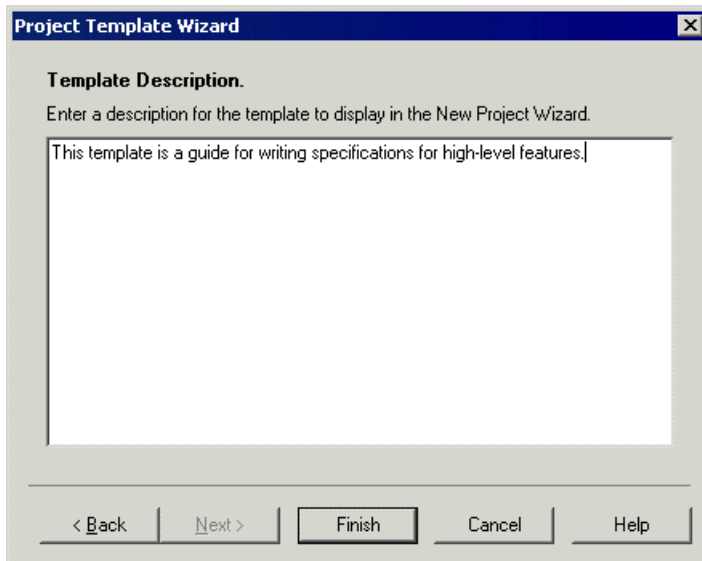
For example, you could create:

- A data project template - containing a CDM, LDM, and PDM targeting your preferred DBMS
  - An application project template - containing an OOM with the UML diagrams required for your modeling practices, along with a PDM and XSM to handle data persistence and format
  - A framework project template - containing a FEAF or other framework matrix
1. Create a project (see *Creating a Project* on page 48).
  2. [optional] Add any appropriate models or files (see *Adding Model and File Documents to a Project* on page 49).
  3. [optional] Create one or more framework diagrams (see *Creating a Framework Diagram* on page 63).

4. [optional] Create a framework matrix (see *Creating a Framework Matrix* on page 64).
5. [optional] Specify any appropriate display preferences (see *Project and Framework Display Preferences* on page 53).
6. Select **File > Save As Template**
7. [optional] Specify a template directory in which to save the template. By default, the project template directory is selected. You can click the **Change Template Directory** tool to select another location.
8. Select a template category from the list or enter a template category name that will be available for when you create other projects. You can use the \ character to create sub-directories, or right-click the project in the Browser, and select **Save As Template** to open the Template Wizard.



9. Click **Next**, and enter a description for the new template that will be displayed in the New Project Wizard when you create projects with the new template. You can modify a template description by right-clicking a project template in the Browser, and selecting **Edit Template**.



10. Click **Finish** to close the wizard and create the template.

The project (.prj) and the models and files it contains are copied to the template directory.

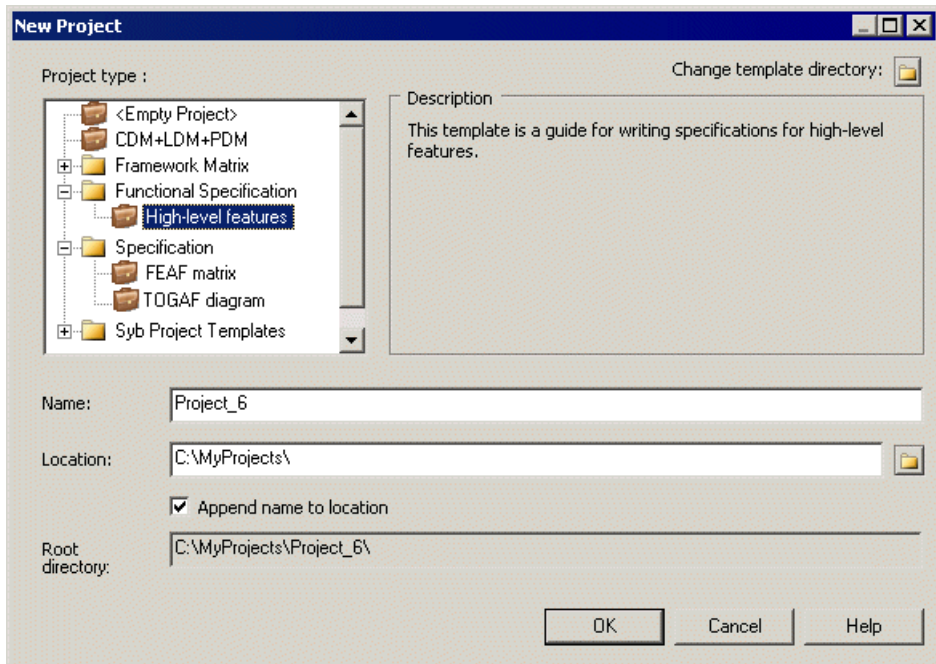
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**Note:** If any documents are outside the project and only attached to it they will not be copied to the template directory and thus may not be available to a user when she creates a project from the template.

---

11. [optional] Select **New > Project** to open the New Project dialog box. The template you have created is available for selection in the Project type tree.





## Project and Framework Properties

Projects, model and file documents, and framework diagrams and matrices have a variety of properties that you can configure to control their behavior.

### Project Properties

To view or edit a project's properties, double-click its Browser or list entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator.

The **General** tab contains the following properties:

Property	Description
Name/Code/Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.

Property	Description
File name	Specifies the location of the project file. This field is empty if the project has never been saved.
Author	Specifies the author of the project. If you enter nothing, the Author field in diagram title boxes displays the user name from the project property sheet Version Info tab. If you enter a space, the Author field displays nothing.
Version	Specifies the version of the project. You can use this box to display the repository version or a user defined version of the project. This parameter is defined in the Title page of the project display preferences.
Default diagram	Specifies the diagram displayed by default when opening the project.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

### **Model and File Document Properties**

To view or edit a document's properties, double-click its diagram symbol or Browser or list entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator.

The **General** tab contains the following properties:

Property	Description
Name/Code/Comment	Identify the object. The name and code are read-only for model documents. You can optionally add a comment to provide more detailed information about the object.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Location	Specifies the path or URL to the document. Read-only for model documents.
[read-only]	The property sheet provides read-only information on the extension, size, and creation and modification dates of the document, as well as noting whether it is inside the project or simply referenced by it.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

### **Dependency Link Properties**

To view or edit a dependency link's properties, double-click its diagram symbol or Browser or list entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator.

The **General** tab contains the following properties:

Property	Description
Type	[read-only] Specifies the type of the dependency link, which can include generation links, reference links, mapping links, and file links.
Influent object	[read-only] Specifies the source object of the dependency link. Click the Properties tool beside the list to open its property sheet.
Dependent object	[read-only] Specifies the target object of the dependency link. Click the Properties tool beside the list to open its property sheet.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

## Framework Matrix Properties

Framework architects can modify a framework matrix properties from its property sheet by enabling the Framework Design Mode, and double-clicking the framework matrix top-left corner.

For more information on enabling the Framework Design Mode, see *Designing Framework Diagrams and Matrices* on page 63.

The **General** tab contains the following properties:

Property	Description
Name/Code/ Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

In addition to the General tab, the framework matrix property sheet contains the following tabs:

- Rows tab – displays a sortable list of rows, in which you can create, edit or delete rows. See *Framework Column and Row Properties* on page 84.
- Columns tab – displays a sortable list of columns, in which you can create, edit or delete columns. See *Framework Column and Row Properties* on page 84.
- Cells tab – displays a list of cells, which is computed from the intersection of columns and rows or from the creation of additional areas. You can edit cells but you cannot delete them

unless you delete the columns or rows to which they belong. See *Framework Node, Cell and Additional Area Properties* on page 84.

- Additional Areas tab – displays the four additional areas available to the framework matrix. You can create, edit or delete additional areas. See *Framework Node, Cell and Additional Area Properties* on page 84.

### **Framework Column and Row Properties**

[Framework architects] To view or edit a column or row's properties, enable the Framework Design Mode, and double-click a column or row header in the framework matrix.

For more information about enabling the Framework Design Mode, see *Designing Framework Diagrams and Matrices* on page 63).

The **General** tab contains the following properties:

Property	Description
Name/Code/Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Help file	Specifies a location for the help file associated with the row or column.
Default folder	Specifies a default folder for the creation of the cell's documents. If no default folder is specified in the cell's property sheet, the row's default folder is used first, then the column's default folder.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

### **Framework Node, Cell and Additional Area Properties**

[Framework architects] To view or edit a node, cell or additional area's properties, enable the Framework Design Mode, and double-click a node in the framework diagram or a cell or an additional area in the framework matrix.

For more information about enabling the Framework Design Mode, see *Designing Framework Diagrams and Matrices* on page 63.

The **General** tab contains the following properties:

Property	Description
Name/Code/Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Help file	Specifies a location for the help file associated with the node and cell.
Default folder	Specifies a default folder for the creation of the node's and cell's documents.
Cell location	[framework matrix only - read-only]  [cell] Specifies the name of the column and row for which the cell is the intersection. Click the Properties tool beside Row and Column fields to open their property sheet.  [additional area] Specifies the location of the additional area: Left, Top, Right, or Bottom area.
Completion status	Controls the percentage of work completed in the node and cell. Enter a value between 1 and 100 in the box. This value is also displayed in the node's and cell's floating list and a rectangle on the node and cell shows the work progression if you have selected the Completion status display preference.
Inactive	[cell only] Specifies a cell which is not available.
Constrain content	Specifies a node and cell, whose content can only be completed by its defined actions.
Composite	[node only] Specifies whether the node is decomposed into sub-nodes displayed in sub-diagrams. When selected a Sub-Nodes tab is displayed in the property sheet to list these sub-nodes. If you deselect this property, then any sub-nodes that you have created will be deleted.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

In addition to the General tab, the framework node and cell property sheet contains the following tabs:

- Actions tab – displays a list of actions, in which you can create, edit or delete actions (see *Framework Action Properties* on page 86).

- Documents tab – displays a list of documents, in which you can create or add existing documents, and also edit or delete documents (see *Attaching a Document to a Framework Node or Cell* on page 59).

## Framework Action Properties

[Framework architects] To view or edit an action's properties, enable the Framework Design Mode, and double-click an action on the **Actions** tab of a node or cell property sheet.

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**Note:** For information about enabling the Framework Design Mode, see *Designing Framework Diagrams and Matrices* on page 63.

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The **General** tab contains the following properties:

Property	Description
Parent	[read-only] Specifies the name of the parent node and cell to which the action belongs.
Name/Code/Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Multiple	When selected, specifies that one or more documents of the selected type can be created.
Mandatory	When selected, specifies that at least one document of the selected type must be created.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

### Detail Tab

The **Detail** tab specifies the nature of the action.

Property	Description
Type	Specifies the nature of the document to attach to the framework nodes and cells (see <i>Specifying Framework Node and Cell Actions</i> on page 65).

Property	Description
Default document name	[Model, Diagram, and File only] Specifies the model, diagram or file name created by default in the Browser.
Model type	[not for File and Dependency Matrix] Specifies a model type to create, for example Enterprise Architecture Model.
Document template	[not for Generation and Dependency Matrix] Specifies the model or file template on which the model or file to create is based, for example a PDM, an LDM, or a .doc, a .xls etc. Click the Ellipsis button to browse for a file on your system.
Model language	[not for File and Dependency Matrix] Specifies a target language associated with the model to create, for example Analysis for a BPM or Java for an OOM. Select a model language in the list. If you do not specify a language, your system default model language is used.
Diagram type	[Model and Diagram only] Specifies a diagram type for the model, for example Class Diagram for an OOM, or Business Process Diagram for a BPM.
Extension	[not for File and Dependency Matrix] Specifies an extension file attached to the model, for example SIMUL8 for a BPM.
Object type	[List only] Specifies the model object type in the list, for example entity, process, table, class etc.
Object stereotype	[List only] Specifies a stereotype to filter the metaclass, for example a <<cluster>> stereotype on an extended object in a PDM targeted for the Oracle Version 9i DBMS.
Dependency matrix	[Dependency Matrix only] Specifies a dependency matrix definition between model objects. Click the Create tool to create a new dependency matrix.
File type	[File only] Specifies the extension of the file to create, for example, .doc, .xls, .txt, etc.
Source model type	[Generation only] Specifies the model type from which to generate the model, for example Business Process Model, Conceptual Data Model etc.
Source cell	[Generation only] Specifies the node and cell containing the model type from which to generate the new model.

## Framework Link Properties

[Framework architects] To view or edit a framework link's properties, double-click its diagram symbol or Browser or list entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator.

For more information about enabling the Framework Design Mode, see *Designing Framework Diagrams and Matrices* on page 63.

The **General** tab contains the following properties:

Property	Description
Name/Code/Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
First object	Specifies the node that the link leads from. You can click the Properties tool to the right of the list to view the properties of the selected object.
Second object	Specifies the node that the link leads to. You can click the Properties tool to the right of the list to view the properties of the selected object.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.



## CHAPTER 4      Objects

Modeling objects, such as tables and entities, are the building blocks of your models. All the objects in a model are listed as items in the Browser and they may also appear as symbols in your diagrams.

Each type of model diagram (see *Diagrams* on page 169) supports certain specific types of objects, and each object created in a diagram is represented by a symbol (see *Symbols* on page 185). A single object can have multiple symbols associated with it to allow it to appear in multiple diagrams or multiple times in the same diagram (see *Creating Graphical Synonyms for Object Symbols* on page 199).

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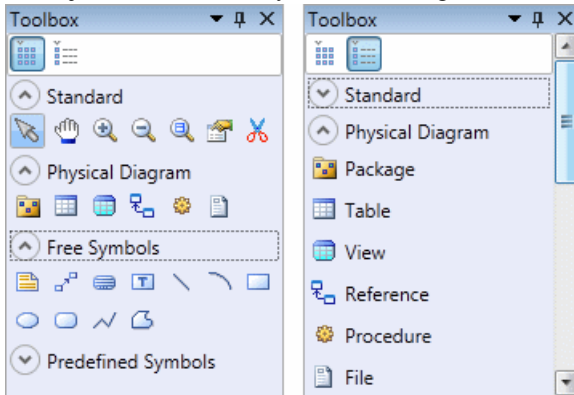
**Note:** For detailed information about a specific type of model or object, see the appropriate modeling guide. The following sections describe generic features available for all objects.

---

### Creating Objects from the Toolbox

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The toolbox is a toolbar that lets you quickly create objects in diagrams. To create an object, click the appropriate tool and then click in the diagram. When you release the mouse button, the object is created, and you can click again elsewhere to create a second object and so on.











To release the tool, simply select another tool or right-click in free space. To revert to a previously selected tool, hold down **Ctrl** and perform a double right-click.

To create a link, click the appropriate link tool, click in the object from which you want the link to begin and hold the mouse button as you drag the pointer to the object in which you want the link to end. When you release the mouse button, the link is created.

The toolbox contains four categories that can be collapsed or expanded by clicking on the up and down arrows:

- **Standard** - containing the basic tools available in all diagrams:

Icon	Action
	Pointer [default] – Selects, moves, and resizes individual symbols. Double-click to select all the objects in the diagram. To switch back to the Pointer from another tool, right-click anywhere in the diagram.
	Grabber – allows you to select, move and resize the entire diagram. Double-click to display the entire diagram, centered.
	Zoom in
	Zoom out
	Open the diagram of a composite object or packages
	Delete a symbol and, optionally, its associated object.
	Open the property sheet of an object
	Create a package

- **Type Diagram** - containing tools specific to the current diagram. For details, see the appropriate modeling guide diagram chapter.
- **Free Symbols** - containing tools for drawing free shapes and links to decorate your diagrams (see *Decorative Symbols* on page 203).
- **Predefined Symbols** - containing tools for drawing standard flowchart shapes.

---

**Note:** To rename an object from its symbol, select it and then press **F2**. If the symbol carries additional editable properties (but not lists of sub-objects), you can navigate to the next with **Tab** (or the previous with **Shift+Tab**). Select the **Edit in place after creation** general option to have the name of each object that you create immediately selected for editing (see *General Options* on page 255).

---

## Creating Objects from the Browser

You can create any object, including objects that do not have symbols, from the Browser. If the Browser is not visible, select **View > Browser** (or press **Alt+0**) to display it.

1. Right-click the model, package, object, or category where you want to create the object, and select **New > object type**.
2. Type an object name and code in the **General** tab of the property sheet, and then add any other relevant properties (see *Object Properties* on page 98).
3. Click **OK** to confirm the creation of the object.

The object is created in the appropriate category in the Browser. If the object has a symbol, it will also be added (where possible) to the current diagram.

## Creating Objects from an Object List

You can create most types of objects in object lists, available under the **Model** menu. Some property sheet tabs, such as a table's **Columns** tab or a class's **Attributes** or **Operations** tabs also contain object lists. Lists provide a method to quickly create multiple objects and change their properties simultaneously.

1. Select **Model > object type** (or open an appropriate property sheet tab).
2. Click the **Add a Row** tool or, if the list is ordered, the **Insert a row** tool.

A new item is added at the end, or before the selected row, of the list.

3. Enter an object name and code and, for link objects, a source and destination object.
4. Repeat as necessary to create additional objects of the same type, and then click **OK**.

For detailed information about object lists, see *Object Lists* on page 108.

## Importing Objects from Excel Files

The Excel Import extension provides a wizard to guide you through mapping tables of objects in an Excel file (v2003 and higher) to PowerDesigner objects and properties, to import them to your model. For example, you could create a list of database tables in an Excel file, specifying any appropriate properties, and then import them into a PDM.

You can import any number of different types of objects from a single Excel file, so long as they can all be imported to a single type of model. Each type of object should be listed in its own table on a separate worksheet of the Excel file. Each row in a table represents one object to import, and each column represents one property (an attribute or list of associated objects) of the object.

In the following example, the Excel file contains worksheets listing tables, keys, references, and reference joins. The **Table** sheet, contains a list of three table to import. The columns **Name**, **Owner**, and **Columns** will be imported as the corresponding table properties:

<u>Name</u>	<u>Owner</u>	<u>Columns</u>
Customers	dba	ID,Name,Password,Email
Orders	dba	ID,CustomerID,Date
OrderLines	dba	OrderID,ProductID,Qty

Table   Table.Key   Reference   Reference.Reference Join

For detailed information about how to organise the file, see *Preparing Your Excel File for Import* on page 94. An example Excel file for importing into a PDM is provided at `install_dir\Examples\excel_import.xls`.

1. [optional] Create extensions to allow you to easily import objects or properties not defined in the standard PowerDesigner metamodel (see *Extension Files* on page 275).

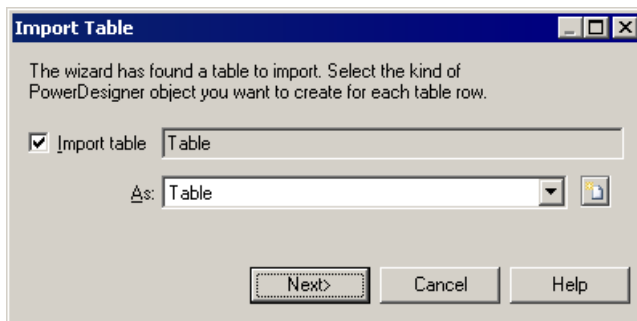
If you do not predefine extensions, the wizard will allow you to specify them during the definition of the mappings prior to beginning the import, but predefined extensions can be more sophisticated and allow the import to proceed more quickly.

2. Open the Excel Import Wizard:

- To create a new model, select **File > Import > Excel File**. Specify the kind of model you want to create in the New Model dialog (see *Creating a Model* on page 9), and then click **OK**.
- To import objects into an existing model, attach the Excel Import extension (available for all model types on the **Import** subtab of the Select Extensions dialog) to your model (see *Attaching Extensions to a Model* on page 277), then right-click the model in the Browser, and select **Import Excel File**.

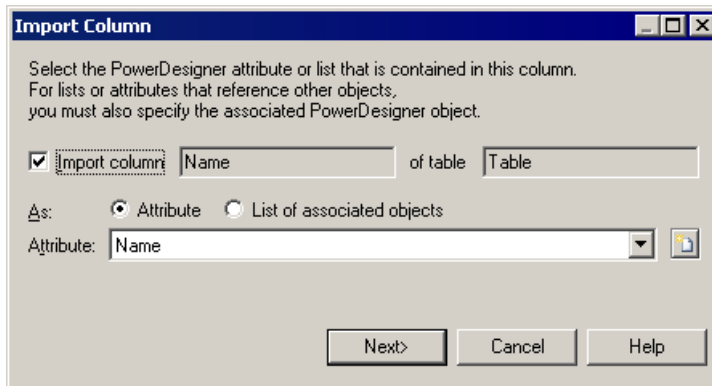


3. Click the **Select File** tool, browse to and select the Excel file to import, and click **Open** to return to the wizard.
4. [optional] Click the **Options** button to open the Import Options dialog (see *Excel Import Options* on page 96), specify any appropriate options and then click **Close** to return to the wizard.
5. Click **Next** to go to the Import Table page:



On this page, you must either:

- Select a PowerDesigner object type to import the table lines **As** from the list.
  - Select to import the table lines as a new object type by clicking the **New** tool to the right of the list to open the New Object Type dialog.
  - Deselect the check box to not import this table. When you click **Next**, PowerDesigner will search the Excel file for another table of objects to import.
6. Click **Next** to go to the Import Column page:



On this page, you must either:

- Select a PowerDesigner attribute to import the table column as from the **Attribute** list. To create a new attribute, click the **New** tool to the right of the list.
  - Select the **List of associated objects** radio button to import the column as a list, selecting the **List** to use and (if the list can contain multiple types of objects), the appropriate **Object**. To create a new list, click the **New** tool to the right of the list.
  - Deselect the check box to not import this table column.
7. Click **Next**. The wizard will search for the next column in the table and if there is none (or if you have selected to skip importing the table), will search for the next sheet containing a table of objects.

When all the worksheets and columns have been processed, the import will begin. You can stop the import at any time by clicking the **Cancel** button in the bottom-right corner. When the import is complete, a dialog will appear showing how many objects have been created.

8. Click **OK** to return to your model and review the imported objects.

If you have instructed PowerDesigner to create new object types or new properties, a new embedded extension called `Import Extensions` is created under the `Extensions` category in the Browser to hold the definitions of these extensions.

In addition to the objects that you have created, PowerDesigner creates an Excel Import object that contains your import parameters, along with a Table Mapping object for each of the imported tables, which lists the column mappings used. Right-click the Excel Import Object to access the following commands:

- **Import** - to re-import your file based on the options and mappings you have already defined. All the objects will be reimported, overwriting any existing objects based on their names. If you have added new objects to your worksheet tables they will be added to the model, but any objects that you have deleted from your worksheet will not be deleted from the model.
- **Change Mappings** - to re-import your file via the Excel Import Wizard in order to modify your table or column mappings.
- **Change Options** - to change the import options preparatory to re-importing with the command **Import**
- **Properties** - to open the Excel Import properties sheet.

---

**Note:** Advanced users may want to modify the Excel Import XEM to enable the import of data from other external file types. For detailed documentation about its implementation, open the XEM (which is located at `install_dir\Resource Files\Extended Model Definitions\ExcelImport.xem` in the Resource Editor and read the detailed commentary on the root element.

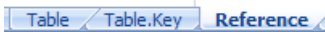
---

### Preparing Your Excel File for Import

By following certain simple rules, you can greatly help PowerDesigner to recognize the information in your Excel files, and thus improve the accuracy and speed of the import.

Follow these rules to ensure that your import goes as smoothly and quickly as possible:

- **Determine your extensions strategy** – The wizard can create simple extensions (new object types or new properties not included in the PowerDesigner metamodel) for you during the import. However, to define more complex extensions or to speed up the import process, you may prefer to predefine your extensions beforehand (see *Extension Files* on page 275) and have the import automatically map them.
- **Insert only one table of objects per worksheet** – If you have more than one table on a worksheet, only the first will be recognized and imported.
- **Name your worksheet after the object to import** – If the name of your worksheet matches the name of a PowerDesigner object type, then the wizard will suggest mapping the table to that object type. The wizard does not recognize plural forms so, if your sheet contains tables, you should call it `Table`, and if it contains classes, call it `Class`.



For sub-objects (objects linked to their parent by composition), you must prefix the name of the object with that of its parent object, (eg `Table.Key`) or it will not be recognized.

- **Name table columns after the property they contain** – If you name each of your columns after the attribute or collection that it contains, then the wizard will suggest mapping the column to that attribute or collection. As a general rule, attributes are singular and collections plural so that, for example, you should name the column that contains your tables' names `Name` and the column containing its columns, `Columns`.

<u>Name</u>	<u>Owner</u>	<u>Columns</u>
Customers	dba	ID,Name,Password,Email

- **Determine how you will reference other objects** – Properties can contain references to other objects. For example, a table Owner property contains a reference to a user object and a business process references the organization unit that performs it. The import tries to resolve references first by searching for an appropriate object in the Excel file, and then in any of the models open in the Workspace (creating a shortcut to the referenced object). Follow these suggestions to optimize your references:
  - Control whether references will be made via object names or codes using the **Reference associated objects by** option.
  - To maximize the clarity of dependencies between objects, place objects that are to be referenced on a worksheet before the objects that will reference them.
  - Ensure that the necessary target models are open in the Workspace to create shortcuts, if appropriate, and select the **Search for referenced objects in other models** option.
  - Use the **Create associated objects if not found** option to instruct PowerDesigner to create the necessary objects if it cannot resolved references either in the Excel file or in models open in the Workspace.
- **Quickly create collections by listing objects in a single cell** – You can create a collection simply by listing its items in a single cell, separated by commas:

<u>Columns</u>
ID,Name,Password,Email
ID,CustomerID,Date
OrderID,ProductID,Qty
Table   Table.Key   Reference

To change the separator, use the **List value separator** option.

- **Represent relationships of composition using a Parent column** – To specify composition relationships (such as columns in a table, classes in a package, or attributes in a class) between objects on different worksheets, specify the parent or location for the sub-object in a Parent column. You can specify a multi-level hierarchy of parents separated by a qualified name separator.

<u>Name</u>	<u>Parent</u>
Area1	
Area2	Area1
Area3	Area1
Area4	Area1.Area2
Area5	Area1.Area3
Architecture Area	Business Fur

---

**Note:** Whereas specifying a collection of sub-objects in a single cell on the parent worksheet allows you to quickly populate the collection, specifying sub-objects on a separate worksheet allows you to detail all their properties.

---

## Excel Import Options

The Excel Import Wizard provides a number of options to allow some flexibility in the format of the data it can import.

Option	Description
Auto-map columns to properties	Instructs the wizard to automatically map Excel tables and columns to objects and properties in the PowerDesigner metamodel. If all your Excel worksheets and table column headings are named from the PowerDesigner metamodel (or your predefined extensions), this option can make the import run without requesting further input (see <i>Preparing Your Excel File for Import</i> on page 94).  Default: Unselected
Create symbols in active diagram	Instructs the wizard to create symbols, where appropriate, for the imported objects in the currently selected diagram.  Default: Unselected
Create associated objects if not found	Instructs the wizard to create objects referenced by the imported objects, if they cannot be found in the Excel file (or in an open model, if the <b>Search for referenced objects in other models</b> option is selected).  For example, in a list of PDM tables, the <code>Owner</code> property references a user object. If you do not supply a list of users on another worksheet or in an open model (or if your list is incomplete), PowerDesigner will create user objects for any references that cannot be resolved.  Default: Selected
Search for referenced objects in other models	Instructs the wizard to search any models open in the workspace to resolve references as shortcuts if the referenced object cannot be found in the Excel file.  Default: Unselected
Reference associated objects by	Specifies whether the object's name or code (the latter of which does not usually permit spaces or special characters) is used in columns that reference the object. In the example above, you could use the user's name or code to reference it in the <code>Owner</code> column of the list of tables.  Default: Name
Qualified name separator	Specifies the character used to separate namespaces in a qualified name, which is used to specify the location or parent of an object. For example, to specify that architecture area <code>Area3</code> is inside <code>Area2</code> , which is in turn inside <code>Area1</code> , you would enter <code>Area1.Area2</code> in the <code>Parent</code> column for <code>Area3</code> .  Default: Dot



Option	Description
List value separator	Specifies the character used to separate items in a list in an Excel cell. For example, you could list all the columns of a table in a cell as follows: <code>ID, Name, Email, Password.</code>  Default: Comma
String literal for 'True' value	Specifies the string used to signify 'True' for boolean attributes. False is signified by an empty cell.  Default: X ('Y', 'Yes', 'True', and '1' also always signify 'True').

## Importing Objects from XML Files

PowerDesigner allows you to import objects from an XML file by defining mappings between the elements in the XML schema and objects in the PowerDesigner metamodel (and any extensions). The import mappings are defined in an extension file, can be shared with all users through the repository library, and are accessed by selecting **File > Import > Import Name**.

Once an import is defined for a particular XML schema, any XML data files conforming to the schema can be imported. If you do not have access to the schema, PowerDesigner can infer a schema from a data file.

---

**Note:** The following procedure gives an overview of the process for defining an XML import. If an administrator has already defined an import and provided the resource file to you, you can perform an import directly by selecting **File > Import > Import Name**.

---

1. Select **Tools > Resources > Extensions > Model Type** to open the appropriate extension file list.

---

**Note:** As XML imports are mapped to a specific set of objects in the PowerDesigner metamodel, you must choose the correct type of extension file. For example, if you are importing business processes, you should create the import definition in a business process model extension file. If the objects defined in your schema do not relate to any of the standard PowerDesigner model types, you should choose a free model (see *Chapter 6, The Free Model (FEM)* on page 219) extension file. If appropriate you can, alternately, define the import in a DBMS or language definition file (see *Creating and Copying Resource Files* on page 274).

---

2. Create a new extension file in the list to contain your XML import definition (see *Creating an Extension File* on page 276).
3. Create an XML import definition in the extension file (see *Customizing and Extending PowerDesigner > Extension Files > XML Imports (Profile)*).
4. Save the extension file and test the import by selecting **File > Import > Import Name**.

5. [optional] Check the extension file into the repository library to have it automatically deployed to all users (see *Sharing Resource Files via the Library* on page 551).

## Object Properties

---

All model objects created in PowerDesigner have property sheets, which organize object properties on tabs.

You can open an object property sheet in any of the following ways:

- In the Browser, double-click the object symbol or its entry.
- Right-click the object symbol or its Browser entry, and select **Properties**.
- Select the object from an object list or in the property sheet of its parent object, and click the **Properties** tool.
- Select an object symbol and press **Alt+Enter**.

Property sheets let you assign extensive and sophisticated properties to objects. Most PowerDesigner objects have the following tabs and properties, but many others, specific to the particular object type, may be available:

- **General** – provides basic information about the object. Almost all objects have these properties:
  - **Name** - clearly identifies the object. By default, names can have up to 254 characters, and can include uppercase, lowercase, and mixed-case strings. Names are controlled by naming conventions (see *Naming Conventions* on page 143) and must be unique within a namespace (see *Object Namespaces* on page 107). If the enterprise glossary is enabled in the model, then autocompletion and glossary compliance checking is available (see *The Glossary* on page 36).
  - **Code** – is used in scripts generated from the model. Codes are controlled by naming conventions and must be unique within a namespace. By default, codes are synchronized with names, but you can decouple them by unselecting the equal sign button to the right of this field. You control this synchronization of codes with names with the **Name to Code mirroring** general option (see *Dialog Box Options* on page 256) and can modify the transformations performed on codes with naming conventions.
  - **Comment** – provides a more detailed description of the object.
  - **Stereotype** - extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
  - **Keywords** - Provide a way of loosely grouping objects through tagging. Separate multiple keywords with commas. You can use keywords as criteria for finding objects (see *Finding Objects* on page 127), and in impact and lineage analysis (see *Chapter 17, Impact and Lineage Analysis* on page 499).

Property sheets of link objects display a picture of the link together with its extremities. Additional information, such as the cardinality value and the role, may also appear.

- **Notes** – lists additional information about the object. See *Notes Tab* on page 101.
- **Rules** – lists the business rules with which the object must comply. A business rule may be a government-imposed law, a customer requirement, or an internal guideline. See *Business Rules* on page 131.
- **Version Info** - provides details about the object owner, creation, and modification date and allows you to access help for the PowerDesigner metamodel metaclass on which the object is based. See *Version Info Tab* on page 106
- **Dependencies** - lists all the objects that depend on the object. See *Dependencies Tab* on page 106
- **Traceability Links** - lists all the objects on which the object depends. See *Creating Traceability Links* on page 431
- **Requirements** – lists the project requirements that the object is intended to satisfy. By default, this tab does not appear. See *Requirements Tab* on page 105

---

**Note:** Use **Ctrl+Page Down** or **Ctrl+Page Up** to move to the next or to the previous tab and display the corresponding object type tab.

By default, property sheets open to the **General** tab. You can choose to open property sheets at the last accessed tab by selecting **Tools > General Options > Dialog**, and selecting **Keep Last Tab** in the **Property Sheets** groupbox.

---

You can customize, create, and hide properties and property sheet tabs using extension files (see *Customizing and Extending PowerDesigner > Extension Files*). Administrators can prepare customized property sheets through permission profiles (see *Chapter 20, Customizing the PowerDesigner Interface* on page 553).

You can control the form of the symbols, the background color, and the text format with display preferences (see *Display Preferences* on page 206). For display preferences to be applied to the mini-diagrams in link object property sheets, click **Set As Default** in the Display Preferences dialog for each modification.

## Customizing a Property Sheet

Since PowerDesigner can hold a rich variety of information about your model objects, property sheets can become overloaded.

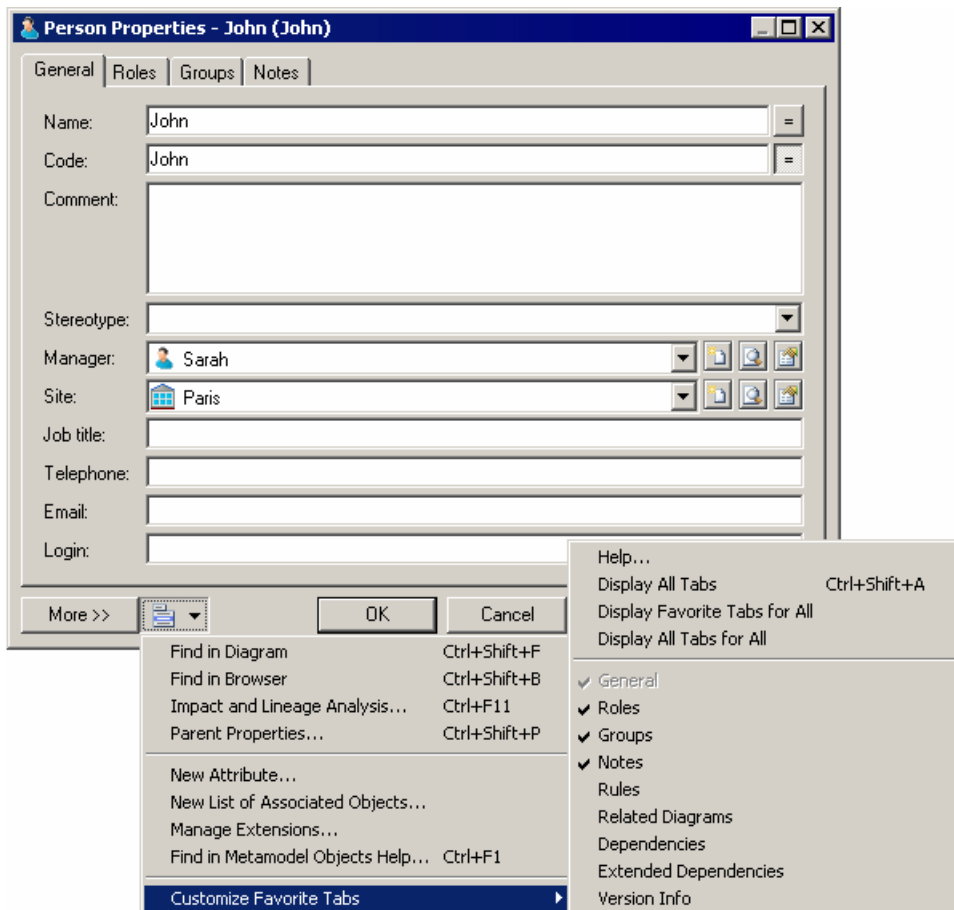
The More or Less button at the bottom left corner of the property sheet allows you to toggle between displaying all the available property sheet tabs, and a subset called "favorite" tabs.

You can customize your list of favorite tabs, and access various other property sheet features, from the property sheet menu, which is accessible from the bottom-left corner of all property sheets.

Command	Description
Find in Diagram	Finds the object in the diagram, found object is displayed centered and selected.

Command	Description
Find in Browser	Finds the object in the Browser and highlights it.
Impact Analysis	Opens the Impact Analysis dialog box.
Parent Properties	Opens the property sheet of the parent object.
New Attribute	Opens the New Attribute dialog, which lets you add new properties to your object property sheets. For more information, see <i>Adding a New Attribute to an Object</i> on page 154.
New List of Associated Objects	Opens the New List dialog, which lets you add new lists of associated objects to your object property sheets. For more information, see <i>Adding a New Collection to an Object</i> on page 157.
Manage Object Extensions	Opens the Manage Object Extensions dialog, which lets you access the metaclass on which the object is based in the Resource Editor. For more information, see <i>Managing Extensions</i> on page 159.
Find in Metamodel Objects Help	Opens the MetaModel Objects Help for the metaclass on which the object is based.
Customize Favorite Tabs	<p>Opens a sub-menu, which allows you to define favorite tabs:</p> <ul style="list-style-type: none"> <li>• Help – opens this help topic</li> <li>• Display All Tabs - Displays all available property tabs for the current property sheet</li> <li>• Display Favorite Tabs for All - Displays favorite tabs for all property sheets throughout all models</li> <li>• Display All Tabs for All - Displays all tabs for all property sheets throughout all models</li> </ul> <p>Beneath the sub-menu are listed all the tabs available for the present object. Favorite tabs have a check against them.</p> <p>Click a tab in the list to select or remove it from the list of favorite tabs. Note that the General tab cannot be unchecked.</p> <p>When you check or uncheck a tab such as Notes, Rules, and Dependencies, which are common to many objects, you are asked to confirm the change for all other objects. If you click No, only the current property sheet is modified.</p>

In the following example, all the tabs except Implementation are checked and are displayed:



Any changes in the display of tabs are immediately applied to the current property sheet but not to other property sheets that are currently open. The changes become the default setting for any property sheet of the same type.

**Note:** You can choose to display tabs on one or several rows in property sheets by selecting **Tools > General Options > Dialog**, and selecting the Tabs on one row option or the Tabs on one several rows option in the Property sheets groupbox.

## Notes Tab

The Notes tab in an object property sheet contains the sub-tabs Descriptions and Annotations, intended to hold additional information about the object.

- **Descriptions** - in general, includes important information that does not fit into the General tab. For example, a description of the Employee entity might read: *This entity has one*

*occurrence for each employee in our worldwide operations. This base should grow by 20 percent in 2002.*

- **Annotations** - contains notes regarding the implementation of a model or the objects it contains. For example, an annotation of the Employee entity might read: *Verify list of attributes with Director of Human Resources.*

Both are editable directly in the tab with the internal PowerDesigner RTF editor. For information about the tools available, see *Text Editor Tools* on page 204.

You can insert the content of an existing text or RTF file in the RTF editor to use it as a standard for your descriptions or annotations. This can be very helpful to standardize objects notes as you can have a description or annotation RTF file for each object type, and open it when needed.

1. Open the object's property sheet, click the **Notes** tab, and select either the **Description** or **Annotation** sub-tab.
2. Click the **Editor Menu** tool and select **Insert**, browse to the file you want to insert and click **Open**.

The content of the file is displayed in the field.

---









**Note:** To see which objects have notes, open the appropriate object list and review the [N]otes checkbox. For information about customizing the display of a list, see *Customizing Object List Columns and Filtering Lists* on page 113.




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### **Preview Tab**

Click the **Preview** tab in the property sheet of the model, packages, and various other model objects in order to view the code that will be generated for it.

The following tools are available on the **Preview** tab toolbar:

Tools	Description
	<p><b>Editor Menu [Shift+F11]</b> - Contains the following commands:</p> <ul style="list-style-type: none"> <li>• <b>New [Ctrl+N]</b> - Reinitializes the field by removing all the existing content.</li> <li>• <b>Open... [Ctrl+O]</b> - Replaces the content of the field with the content of the selected file.</li> <li>• <b>Insert... [Ctrl+I]</b> - Inserts the content of the selected file at the cursor.</li> <li>• <b>Save [Ctrl+S]</b> - Saves the content of the field to the specified file.</li> <li>• <b>Save As...</b> - Saves the content of the field to a new file.</li> <li>• <b>Select All [Ctrl+A]</b> - Selects all the content of the field.</li> <li>• <b>Find... [Ctrl+F]</b> - Opens a dialog to search for text in the field.</li> <li>• <b>Find Next... [F3]</b> - Finds the next occurrence of the searched for text.</li> <li>• <b>Find Previous... [Shift+F3]</b> - Finds the previous occurrence of the searched for text.</li> <li>• <b>Replace... [Ctrl+H]</b> - Opens a dialog to replace text in the field.</li> <li>• <b>Go To Line... [Ctrl+G]</b> - Opens a dialog to go to the specified line.</li> <li>• <b>Toggle Bookmark [Ctrl+F2]</b> Inserts or removes a bookmark (a blue box) at the cursor position. Note that bookmarks are not printable and are lost if you refresh the tab, or use the <b>Show Generation Options</b> tool</li> <li>• <b>Next Bookmark [F2]</b> - Jumps to the next bookmark.</li> <li>• <b>Previous Bookmark [Shift+F2]</b> - Jumps to the previous bookmark.</li> </ul>
	<p><b>Edit With [Ctrl+E]</b> - [OOM only] Opens the previewed code in an external editor. Click the down arrow to select a particular editor or <b>Choose Program</b> to specify a new editor. Editors specified here are added to the list of editors available at <b>Tools &gt; General Options &gt; Editors</b>.</p>
	<b>Save [Ctrl+S]</b> - Saves the content of the field to the specified file.
	<b>Print [Ctrl+P]</b> - Prints the content of the field.
	<b>Find [Ctrl+F]</b> - Opens a dialog to search for text.
	<b>Cut [Ctrl+X]</b> , <b>Copy [Ctrl+C]</b> , and <b>Paste [Ctrl+V]</b> - Perform the standard clipboard actions.
	<b>Undo [Ctrl+Z]</b> and <b>Redo [Ctrl+Y]</b> - Move backward or forward through edits.
	<p><b>Refresh [F5]</b> - Refreshes the Preview tab.</p> <p>You can debug the GTL templates that generate the code shown in the Preview tab. To do so, open the target or extension resource file, select the <b>Enable Trace Mode</b> option, and click <b>OK</b> to return to your model. You may need to click the <b>Refresh</b> tool to display the templates.</p>

Tools	Description
	<b>Select Generation Targets [Ctrl+F6]</b> - Lets you select additional generation targets (defined in extensions), and adds a sub-tab for each selected target. For information about generation targets, see <i>Customizing and Extending PowerDesigner &gt; Extension Files &gt; Generated Files (Profile) &gt; Generating Your Files in a Standard or Extended Generation</i> .
	<b>Show Generation Options [Ctrl+W]</b> - Opens the Generation Options dialog, allowing you to modify the generation options and to see the impact on the code.
	<b>Ignore Generation Options [Ctrl+D]</b> - [PDM only] Ignores changes to the generation options made with the <b>Show Generation Options</b> tool.

### **Finding Text Using Regular Expressions**

You can use regular expressions to find script text displayed in the Preview or Script tab of a table property sheet, as well as in the Edit/Run Script editor, the Resource Editor, and various other windows.

In order to be able to search for text using regular expressions, you must select the Regular Expression check box in the dialog box and enter a regular expression in the Find What box.

Regular expressions can contain ordinary characters and the following *metacharacters*:

Character	Description
\	Matches a special character Examples: "n" matches "n". "\n" matches a newline character. "\\\" matches "\" and \"(\" matches \"(\"
^	Matches the position at the beginning of the input string Examples: "^Win" matches strings beginning with "Win"
\$	Matches the position at the end of the input string Examples: "then\$" matches strings ending with "then"
*	Matches the preceding character zero or more times Examples: "zo*" matches "z" and "zoo"
+	Matches the preceding character one or more times Examples: "zo+" matches "zo" and "zoo", but not "z"



Character	Description
?	Matches the preceding character zero or one time Examples: "to?" matches either "t" or "to"
.	Matches any single character except the newline \n Examples: ".ork" matches "Work", "Fork" etc
[ ]	Matches any one of the enclosed character Examples: "[abc]" matches "a", "b", or "c" A range of character can be indicated with a dash "[a-z]"

For a complete list of metacharacters and their behavior in regular expressions, see the Visual Basic Documentation.

## Requirements Tab

You can attach one or more requirements to an object using the Requirements tab in the object property sheet. This tab is not displayed by default, and can only be used if one or more requirements models is open in the workspace.

---

**Note:** To display the Requirements tab, select **Tools > Model Options** and select the **Enable links to requirements** option.

---

1. Open the object's property sheet and click the **Requirements** tab.
2. Click the **Add Objects** tool to open a selection dialog.
3. Select a Requirements model and, optionally, a package to display a list of the requirements contained therein.
4. Select the requirements that you want to attach to the object and click **OK**.

The selected requirements appear in the Requirements tab.

5. [optional] Select the requirement in the list and click the **Properties** tool to open its shortcut property sheet. To open the property sheet of the requirement itself, click the **Target Object Properties** button to the right of the **Name** field.

---

**Note:** To access the property sheet of the requirement directly instead of passing by the shortcut, select **Tools > General Options > Dialog**, and select the **Target Object** radio button beside the **External Shortcut** option.

---

6. Click **OK** to close the property sheet and return to the model.

## Version Info Tab

PowerDesigner automatically manages version information about model objects on the read-only **Version Info** tab of the object's property sheet.

Property	Description
Creation User	Specifies the name of the User who created the object.
Creation Date	Specifies the date of creation of the object
Last Modification User	Specifies the Name of the user who made the last modification to the object.
Last Modification Date	Specifies the date of the last modification of the object
Replicated From	[replicated objects only] Specifies the name of the origin object from which the object was replicated.  Click the button to the right of this field to open the origin object property sheet
Generated From	[generated objects only] Specifies the name of the origin object from which the object was generated.  Click the button to the right of this field to open the origin object property sheet

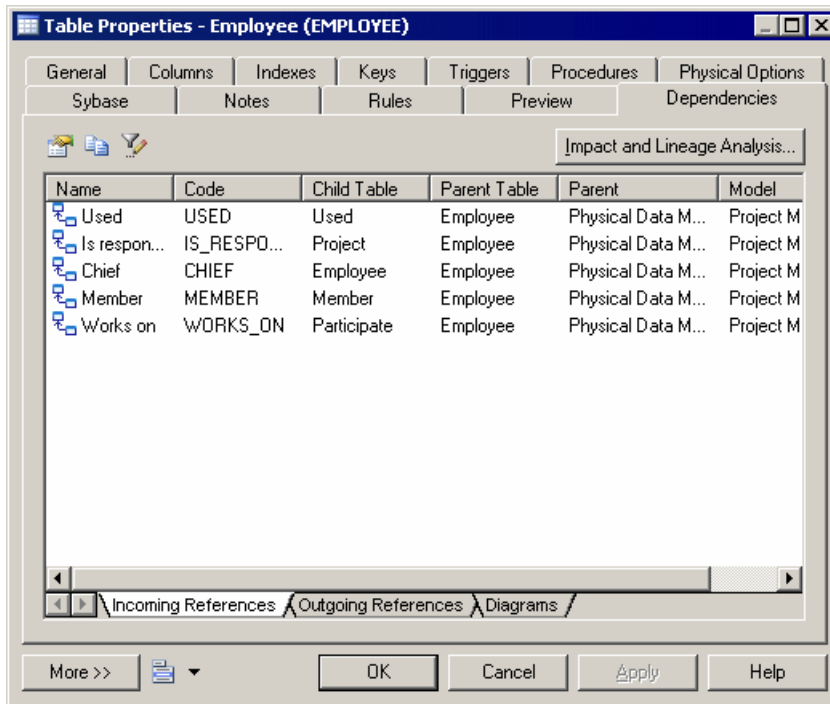
**Note:** In addition to the standard help accessible via **F1** or by clicking the **Help** button, you can obtain information about the PowerDesigner metamodel metaclass on which this object is based by clicking the small question mark button at the bottom right of the tab.

## Dependencies Tab

The PowerDesigner metamodel provides the capability to link objects to other objects in a variety of semantic ways. For example, when you create an external shortcut, or when you attach a business rule to an object, a dependency link is created between models or objects. The **Dependencies** tab of the object's property sheet displays these links.

Dependencies can be:

- Internal - to other objects within the model. These dependencies are saved in the model and are always available on the **Dependencies** tab of an object property sheet
- External - to objects in other models via shortcuts or generation links (see *Creating Links Between Models* on page 430). These dependencies are available on this tab only if the linked model is open in your workspace, or if you have checked both models into the repository and have checked your model out with the **Check out dependencies** option (see *Checkout Parameters* on page 315).



## Object Namespaces

In PowerDesigner, each package can be a namespace. It is however possible to expand the namespace to the parent of a given package. You can cascade the expansion until you reach the level of the model itself.

Objects that appear in the Browser obey the general rules that follow:

In Browser	Namespace	Uniqueness rule
Objects directly under a package or a model (table, process, class)	Model	Unique name and code in model
	Package	Unique name and code in package
Objects under parent object (column, attribute)	Not applicable	Unique name and code in parent
Linking objects (reference, relationship)	Not applicable	Unique name and code between same end objects (i.e., parallel links with same name and code are not allowed between same end objects)

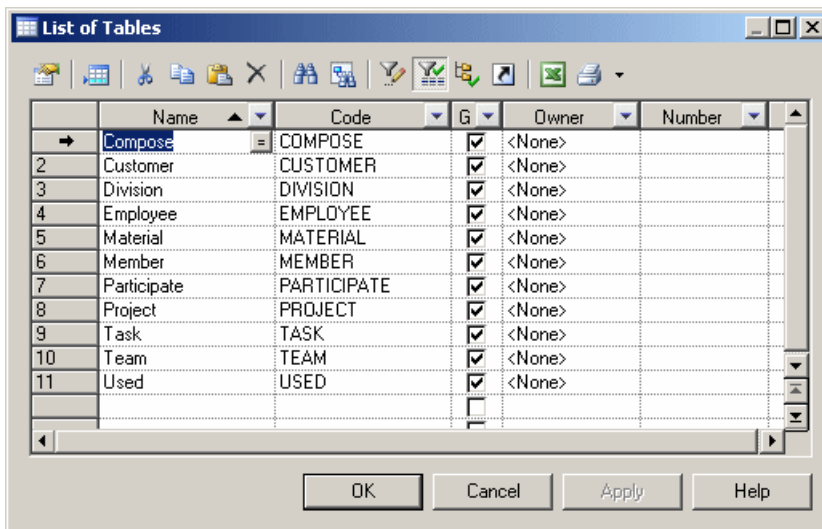
However, you may encounter some exceptions to those rules. For example only the code of a reference allows to identify the object in the entire model, when the "Unique code" option is

selected in the Model Options dialog box. PowerDesigner warns you when a general rule is not respected.

## Object Lists

PowerDesigner object lists provide a spreadsheet-like interface for manipulating large quantities of objects. They offer you an overview of the objects in your model and can save you time and effort in managing your metadata. While property sheets provide depth of detail for individual objects, lists allow you to select and manipulate multiple objects simultaneously to streamline creation and improve consistency.

Lists of all the major objects in your model are available under the **Model** menu or by right-clicking your model in the Browser and selecting **List of objects**. Each list shows all the objects of that type in the currently selected package or model, including those that do not have symbols in the current diagram:



















The properties of the listed objects are organized in columns. You can order the list by a particular columns values by clicking on its column header. To filter the values in a column, click the down-arrow on the right of the column header and enter your filter (see *Filtering a List Using In-Column Filters* on page 111).






You can control which property columns are displayed, and also filter the list based on the values in any of the columns (see *Customizing Object List Columns and Filtering Lists* on page 113).

You can select multiple items in a list by **Ctrl**-clicking them in the far-left, numbered column. To select all the items in a list, click the top-left corner box. When multiple items are selected, any edits you make to properties are applied to all the selected items.

**Note:** By default, you must click the **Apply** button to commit changes or the **OK** button to commit and close the list. To have changes committed immediately when you enter them in a field, enable the **Auto commit** general option (see *Dialog Box Options* on page 256). You can always use the **Undo** tool to cancel the change.

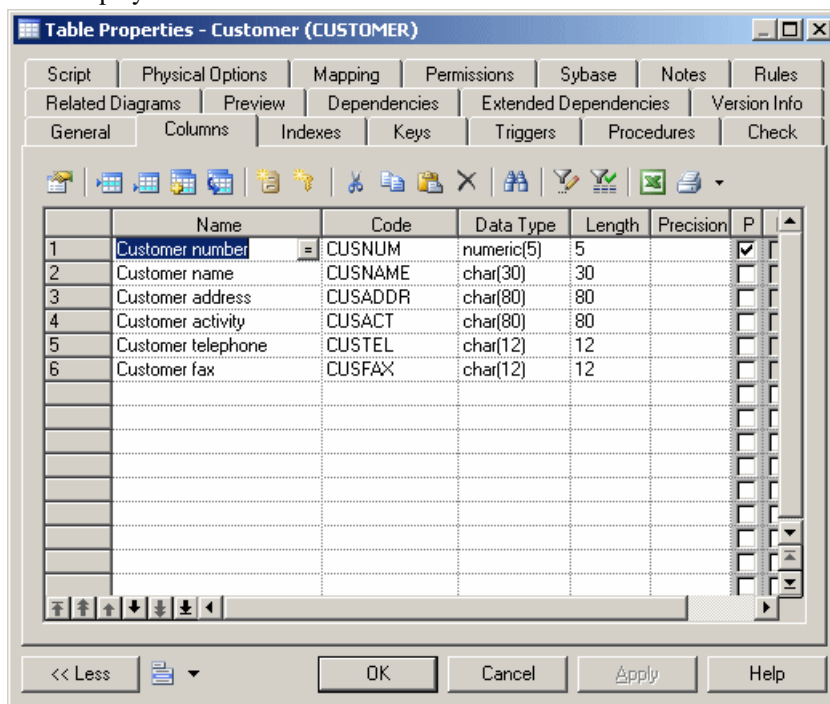
All or some of the following tools are available on object lists:

Tool	Description
	<b>Properties</b> - Opens the property sheet of the selected item (see <i>Object Properties</i> on page 98).
	<b>Insert a Row</b> - [ordered lists only] Inserts a row before the selected row in the list.
	<b>Add a Row</b> - Adds a row at the end of the list.
	<b>Add Objects</b> - Opens an object selection dialog box to select objects and copy them to the list (see <i>Adding an Item from a Selection List</i> on page 118).
	<b>Create Object</b> - Creates a new object and opens its property sheet to allow you to complete its definition.
	<b>Reuse/Replicate Objects</b> - Opens an object selection dialog box to reuse objects. When you select an item you create a link to the original instead of copying it to the list.
	<b>Cut</b> - Cuts the row and stores it in the Clipboard.
	<b>Copy</b> - Copies the selected row to the Clipboard.
	<b>Paste</b> - Pastes the contents of the Clipboard.
	<b>Delete</b> - Deletes the row.
	<b>Find a Row</b> - Opens the Find dialog to search for an item in the list.
	<b>Find Symbol in Diagram</b> - Finds the object's symbol in the diagram.
	<b>Customize Columns and Filter</b> - Opens a dialog to change the columns displayed in the list or define a filter (see <i>Customizing Object List Columns and Filtering Lists</i> on page 113).
	<b>Enable/Disable Filter</b> - Toggles the filter specified in the Customize Columns and Filter dialog.
	<b>Include Sub-Packages</b> - Includes objects in sub-packages in the list.
	<b>Include Composite Objects</b> - Includes composite objects (such as sub-processes, sub-activities, sub states, etc.) in the list.

Tool	Description
	<b>Include Shortcuts</b> - Includes object shortcuts (see <i>Creating Shortcuts</i> on page 457) in the list. Shortcuts are grayed as they cannot be modified. When you include shortcuts whose target model is closed, some information may be unavailable.
	<b>Open Diagrams</b> - [Related Diagrams tab] Opens a target model or a diagram (see <i>Specifying Diagrams as Related Diagrams</i> on page 172).
	<b>Shortcut</b> - Opens an object selection list to change the target object of a shortcut
	<b>Export to Excel</b> - Saves the list to a *.xls, *.xlsx, or *.csv format (specify the format in the <b>Save as type</b> field in the Save as dialog).
	<b>Print</b> - Prints the list. Click the arrow to the right of the button to view a print preview or to access the Page Setup dialog.

### Sub-Object Lists

Many objects have property sheets that contain sub-object lists, which list all of the child objects of that type belonging to the object. For example, the Columns tab in a table property sheet displays the list of columns in the selected table:



These lists provide the same features as the lists of objects available from the **Model** menu. Depending on the properties of the listed objects, the list may have a natural order that you can

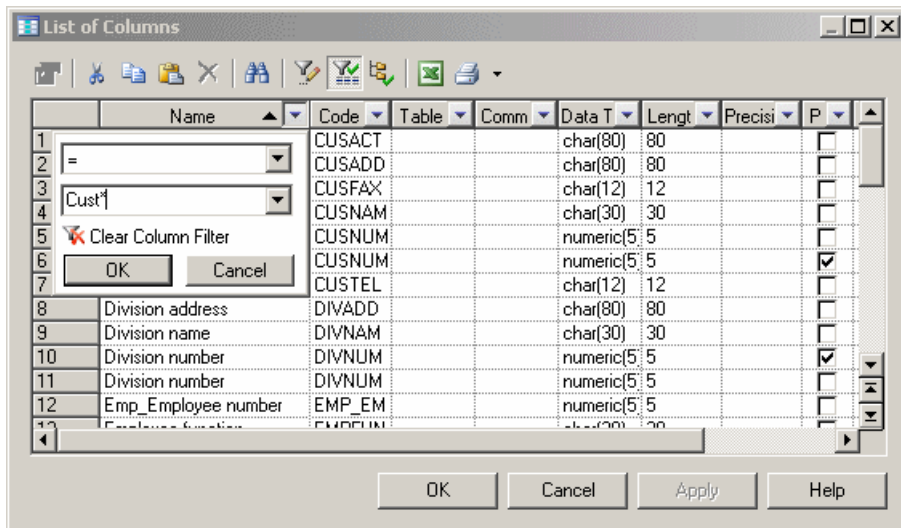
control. For example, a list of columns has such an order, and you can move objects in the list by selecting them and then clicking on one of the arrows at the bottom left corner of the list.

## Filtering a List Using In-Column Filters

To filter a list by the values in a column, click the down arrow on the right of the column header to display the in-column filter dialog.

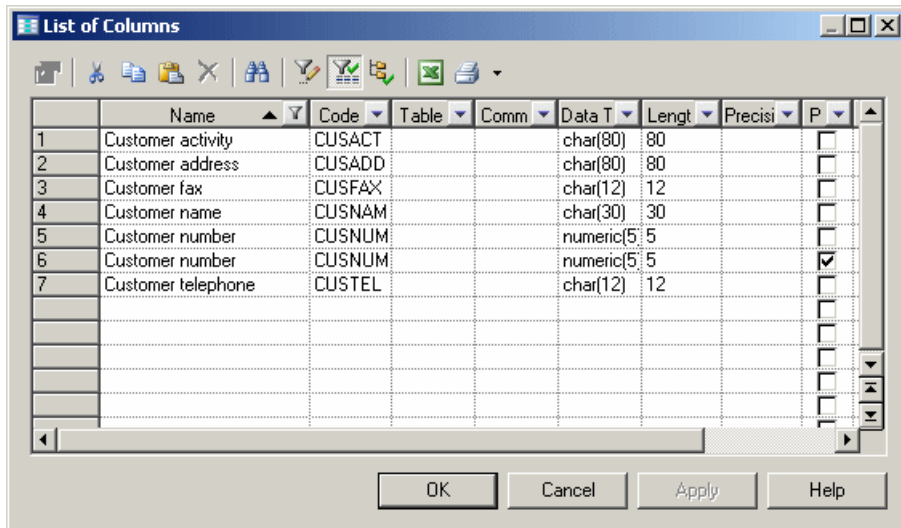
**Note:** If the in-column filter arrows are not displayed, click the **Customize Columns and Filter** tool and select the **Show column filter buttons** option.

1. Select an operator from the first list and, if appropriate, select or enter an expression value to test against it. In this example, the list will be filtered to show only rows where the **Name** column contains values beginning with **Cust\***.

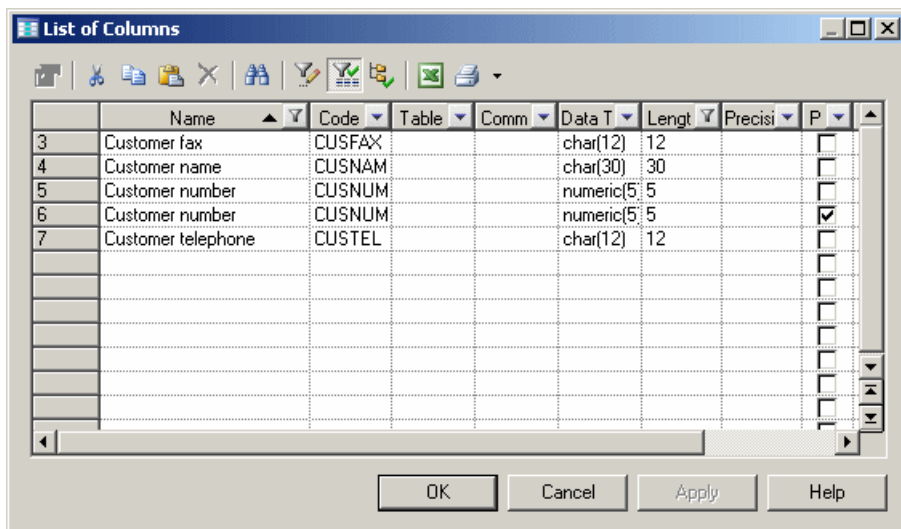


For an explanation of the available operators and the syntax for the expressions, see *Defining a Filter Expression* on page 116.

2. When you are satisfied with your criteria, click **OK** to apply the filter. The down arrow is overlaid with a filter symbol to show that a filter is applied, and any rows not meeting the criteria are hidden. In addition, to **Enable/Disable Filter** button is pressed. In this example, the **Name=Cust\*** filter is applied:



3. [optional] Further restrict the rows displayed by defining a filter on any number of other columns. In this example, both the Name=Cust\* filter and a Length<80 filter are applied:



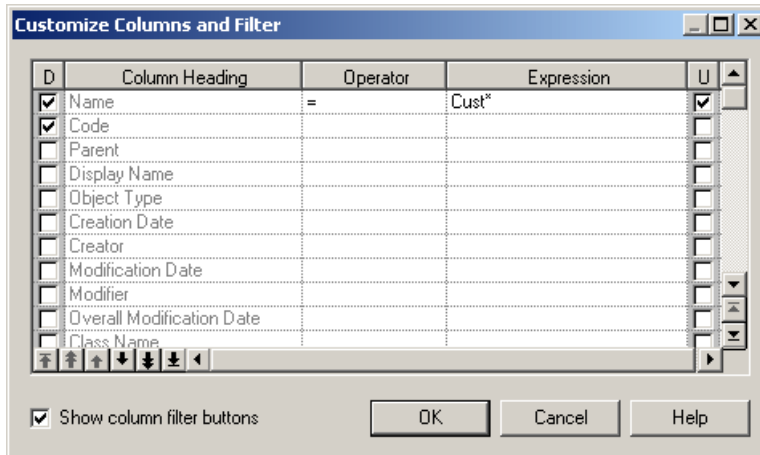
**Note:** The filter criteria are stored in the Customize Columns and Filter dialog and remain applied until you remove them. To remove all filters, click to release the **Enable/Disable Filter**. To remove a filter from a single column, click the filter button in the column header, and then click the **Clear Column Filter** button.



## Customizing Object List Columns and Filtering Lists

You can choose which property columns to display in object lists, reorder them, and filter the rows to be displayed from the Customize Columns and Filter dialog.

1. Click the **Customize Columns and Filter** tool on an object list toolbar to open the Customize Columns and Filter dialog.
2. Perform any of the following functions to filter the list:
  - Select columns to display - by checking the **[D]**isplay column checkbox.
  - Reorder the columns in the list - by using the arrows at the bottom left of the dialog. To move all the selected rows to the top of the list, press **SHIFT+ENTER**.
  - Define one or more filter expressions - by selecting an operator in the **Operator** column and entering an expression to filter by in the **Expression** column.

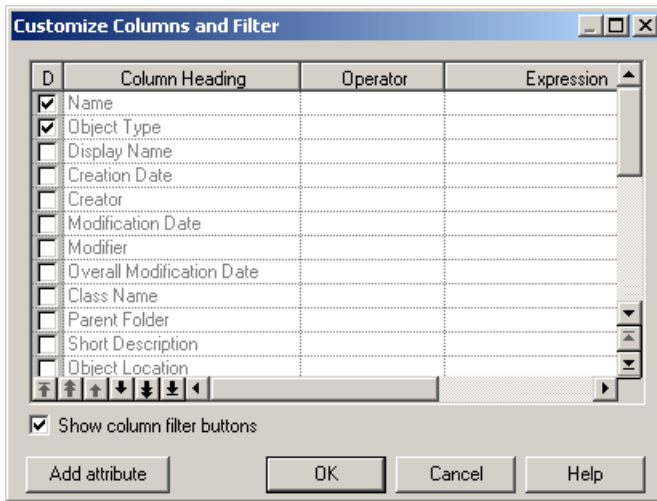


The **[U]**sed checkbox is automatically selected when you enter a filter expression. To disable the expression but keep it in memory, clear the checkbox.

- Enable or disable in-column filtering directly in the list (see *Filtering a List Using In-Column Filters* on page 111) by selecting the **Show column filter buttons** option.
3. Click **OK** to return to the list. The filter is applied by default, and the **Enable/Disable filter** tool is depressed. Click this tool to toggle between enabling and disabling the filter.

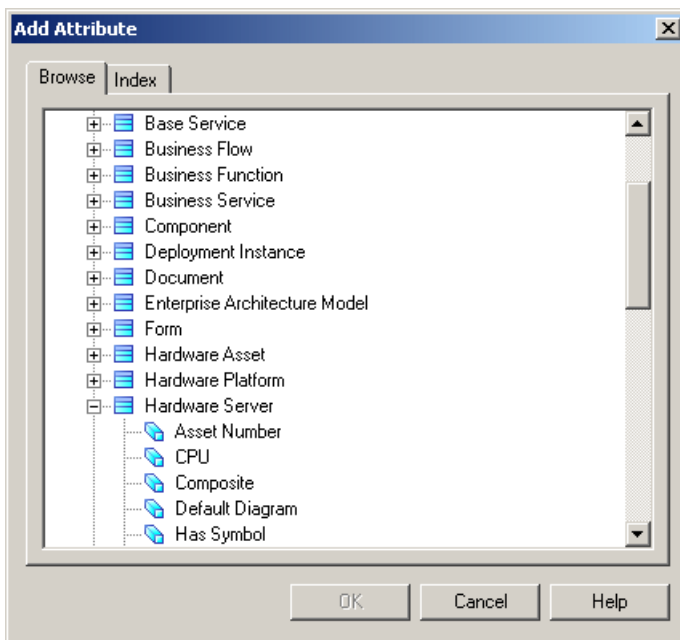
## Customizing Columns in Lists Containing Multiple Types of Objects

PowerDesigner supports lists containing multiple types of objects. As each type of object has different sets of properties, by default only properties common to all the object types are available for selection to display in the list. However, you can customize display properties specific to one or more object types by using the **Add Attribute** button at the bottom of the Customize Columns and Filter dialog.



**Note:** The **Add Attribute** button is only available when the list can contain multiple types of objects.

The button opens a dialog that lets you select any attribute for any object that is available in this context:



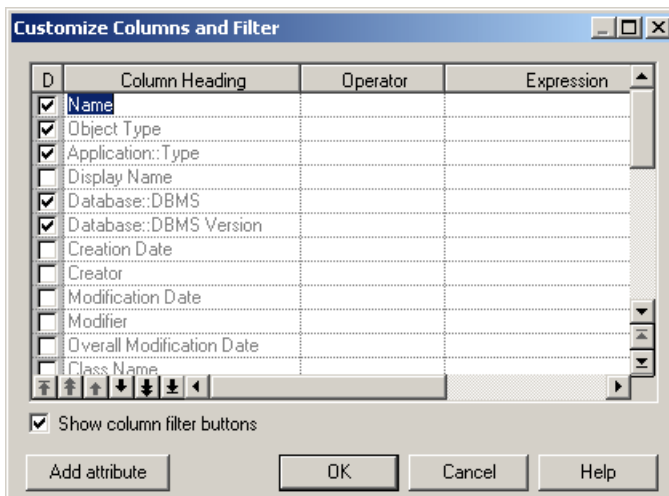
When you select an attribute and click **OK**, it is added to the list in the Customize Columns and Filter dialog and all instances of the attribute (if it is available for multiple objects) are

removed from the Add Attribute dialog. You can add as many attributes as necessary and apply filters on them as appropriate.

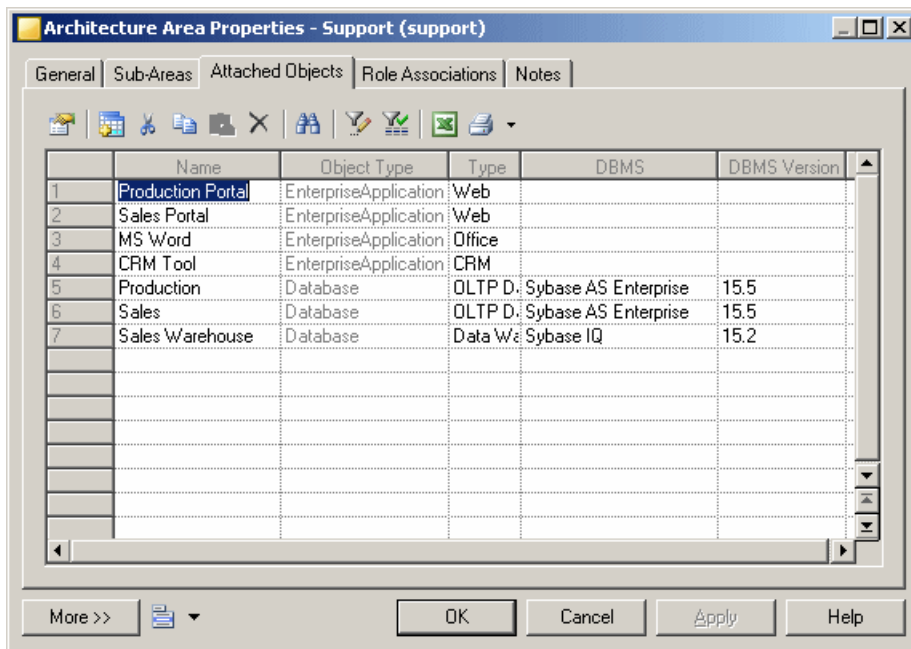
**Note:** If you deselect an attribute in the Customize Columns and Filter dialog and click **OK**, it will be removed from the list of properties available for display. If you change your mind and want to display it once again, you will need to re-add it with the **Add Attributes** button.

For example, the EAM architecture area can contain many different types of objects, and these are listed on the **Attached Objects** tab of its property sheet. Here, I've added the following attributes:

- `Application::Type` - though I selected the Type attribute for the Application metaclass, the Type attribute present in any other metaclasses available in this context will be displayed too.
- `Database::DBMS`
- `Database::DBMS Version`



When I return to the list tab, my new attributes are displayed as columns with values where appropriate. Both my applications and databases have **Type** properties, but only my databases display values for the **DBMS** and **DBMS Version** columns:



## Defining a Filter Expression

You can define expressions to filter PowerDesigner lists directly in the list with the in-column filters or through the **Customize Columns and Filter** dialog.

The following operators are available

Operator	Finds items that are...
=	[default] Equal to the expression.
>	Greater than the expression.
>=	Greater than or equal to the expression.
<	Less than the expression.
<=	Less than or equal to the expression.
Not Equal	Different from the expression.
In List	Within the comma-separated list of values given in the expression (or the items selected in the list in the in-column filter). For example: "global", "Architecture", "proc"
Not In List	Outside the comma-separated list of values given in the expression (or the items selected in the list in the in-column filter).

Operator	Finds items that are...
Between	Located in the range between defined by the two values given in the expression and separated by a comma. For example, to find values between A and E, enter: A, E
Not Between	Located outside the range defined by the two values given in the expression and separated by a comma. For example, to find values outside of the range between A and E, enter: A, E
Empty	Null. No expression is necessary with this operator.
Not Empty	Not null. No expression is necessary with this operator.

You can use the following wildcards when entering a filter expression:

Wildcard	Description
*	Any string (from none to any number of characters). For example P* finds "protocol" and "Paris".
?	Any character. For example ????? finds "Table" and "inner" but not "Seller".
\	Escapes the special characters *, ?, and \ . For example, \? \ finds "?\".

### Examples

The following examples show some possible combinations of operators and expressions:

Operator	Expression	Find
=	W*	Work, Washington
=	*CODE	AREA CODE, COUNTRY CODE, CITY CODE
>	1??	200, 405, 609
Between	0, 8	0,1,2,3,4,5,6,7,8
In List	*_emp_???, *_grp_???	div_emp_fun, _emp_idn, div_grp_fun, _grp_idn
=	*\?	Is this book ready for production?

## Adding Items to and Reordering Items in a List

If a list is ordered you can choose to add an item at the end or at a certain point in the list, and you can reorder the items in the list. When you add a new item to a list, it is created with a

## CHAPTER 4: Objects

default name and code that you can edit. Objects are not actually created until you click Apply or OK.



---

**Note:** In general, you are not required to provide any specific properties when you create an object. However, when you create a link object, such as a reference, association link, or inheritance link, you must specify the source and the destination.

---







### *Adding Items at the End or at a Particular Point in a List*

The following tools are available for adding items to a list:

Tool	Description
	Add a Row - Adds an item to the end of the list. You can also add an item to the end of a list by clicking in any empty row.
	Insert a Row [ordered lists only] - Adds an item in the row above the selected row. You can always reorder items in an ordered list by selecting and dragging and dropping them or by using the arrow tools at the bottom left of the list.

### *Arranging Items in an Ordered List*

In ordered lists, you can drag and drop objects to reorder them, or use the following buttons at the bottom of the list:

Tool	Description
	Move the selected items to the top of the list.
	Move the selected items up one page
	Move the selected items up one line
	Move the selected items down one line
	Move the selected items down one page
	Move the selected items to the bottom of the list

## **Adding an Item from a Selection List**










Selection lists allow you to select items from a list in order to associate them with another object.



Most selection lists display objects contained in the current model or in individual packages contained in that model. Other selection lists, such as the following, allow you to display both objects contained in the current model and other models:

- Select Diagrams. From this dialog box you can select the diagram to which you want to apply pre-defined display preferences.

- Add Shortcuts. From this dialog box you can select objects to include them as shortcut in your model or package.
- Add Objects. From this dialog box you can select objects to which you want to attach traceability links.

The following tools are available in selection lists:

Tool	Description
-	Model list - Lets you specify a model as the basis for the list.
-	Package list - Lets you specify a package as the basis for the list.
-	Owner List - [PDMs only] Lets you specify a user as the basis for the list. The list will contain only objects owned by the specified user or by no user. If you select User <NONE>, then all the objects are displayed.
	<p>Include Sub-Packages - Includes objects contained in sub-packages (Include Sub-Packages) in the list.</p> <p>As this tool allows you to display all objects, regardless of their package, some objects in the list may have the same name and be difficult to identify. In this situation, you can use the Customize Columns and Filter tool, to display the Object Location column to identify where the objects are defined.</p>
	Include Composite-Objects - Includes composite objects, such as sub-process, sub-activity, sub state, in the list
	Include External Shortcuts - Includes shortcuts to objects in other models in the list. The model containing the original objects must be open for external shortcuts to be available for selection. When generating, external shortcuts are generated as ordinary objects.
	Select All - Selects all the objects in the current object type tab. To select all check boxes in all object type tabs, click the arrow and select All Lists or you can press the <b>Ctrl</b> key and click the Select All tool.
	Deselect All - Deselects all the objects in the current object type tab. To clear all check boxes in all object type tabs, click the arrow and select All Lists or press the <b>Ctrl</b> key and click the Deselect All tool.
	Use Graphical Selection - Selects only the objects currently selected in the diagram. To apply the graphical selection in all object type tabs, press the <b>Ctrl</b> key and click the Use Graphical Selection tool.
	Move Selected Items to Top - Moves all selected objects to the top of the list.
	Move Selected Items to Bottom - Moves all selected objects to the bottom of the list.
	Customize Columns and Filter - Opens the Customize Columns and Filter dialog (see <i>Customizing Object List Columns and Filtering Lists</i> on page 113), which allows you to define a filter expression to apply to the selection list.

Tool	Description
	Enable/Disable Filter - Applies the filter defined in the Customize Columns and Filter dialog to restrict the list of objects available for selection to those meeting its criteria. The currently defined filter is displayed in the Filter box underneath the object list.
	Use Filter for Selection - Applies the filter defined in the Customize Columns and Filter dialog to select all objects meeting its criteria from the list. This selection by criteria is persistent for as long as the tool is applied.
<b>Ctrl</b> + selection tool	Applies the action of the selection tool to all object types in the different tabs.

### *Saving Object Selections*

In some selection lists, you can save sets of object selections in your model, so that you can reuse them easily. To save a selection, enter a name in the Selection list at the bottom of the Selection tab then click the Save tool beside the list. The selection is saved as part of the model file.

---

**Note:** When reverse engineering from a live data source, object selections are saved into separate files, as you need not have any model open in the Workspace (see *Data Modeling > Building Data Models > Generating and Reverse-Engineering Databases > Reverse Engineering a Database into a PDM > Database Reverse Engineering Selection Window*). In this case, you must select a folder before being able to save the object selection.

---

### *Confirming Object Selections*

In a selection list, the display of your object selection may be modified whenever you perform one of the following actions:

- Change the folder selection using the Model or Package list
- Deselect the Include Sub-Packages/Sub-Objects tool
- Deselect the Include Shortcuts tool
- Apply a filter using the Enable Filter tool
- Change the database or owner in the Reverse Engineering from a data source dialog box

In this case, some objects that have already been selected will no longer be displayed, and a dialog opens prompting you to:

- Select only the objects displayed - Other objects that are no longer displayed are deselected.
- Keep the hidden objects in the selection – All the previously selected objects are retained, including those that are no longer shown. This allows you to take into account object selections you have made in several packages for example.
- Cancel - The commit of the selection list is canceled and the selection page now displays all objects and sub-objects in the model to let you modify your selection if necessary.

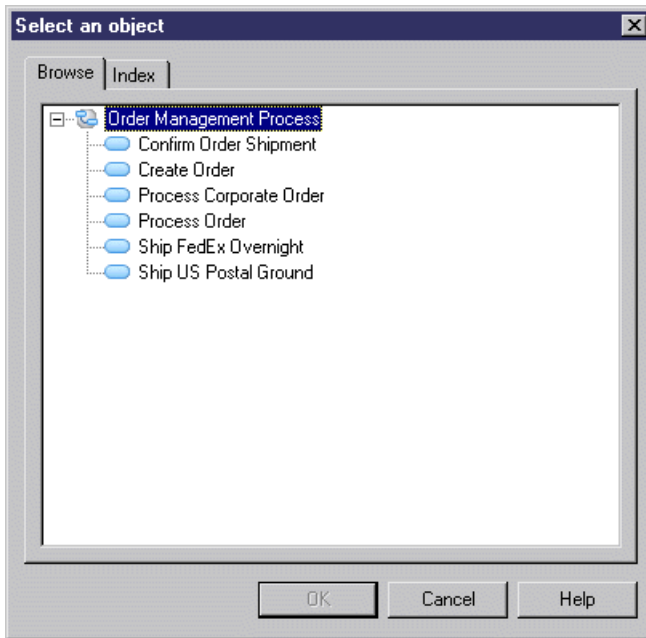
If you confirm your selection by clicking OK, the confirmation dialog will not be displayed again, even if you again modify your parameters.



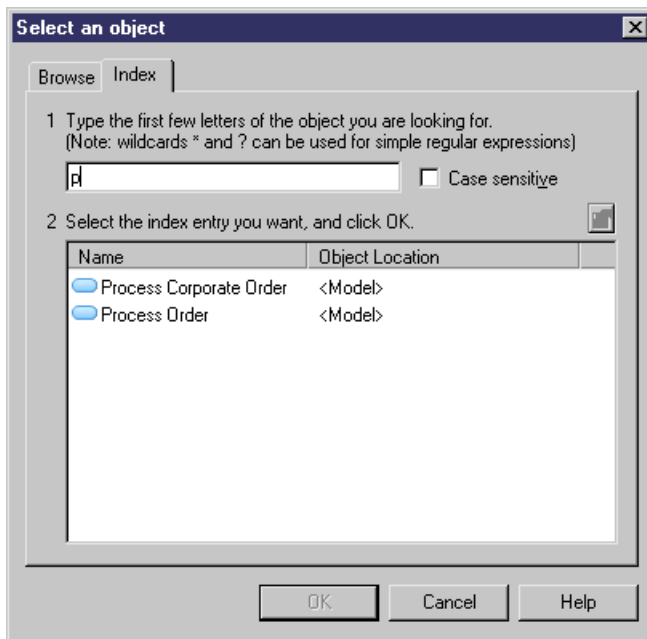
## Selecting an Object from a Selection Tree

Certain selection dialogs allow you to choose objects from a tree view or by searching by name.

The **Browse** tab allows you to choose an object from a tree view:



The **Index** tab lets you search for an object by entering all or part of its name (or code depending on the **Display Name/Code** model option). Objects are sorted alphabetically in the list and dynamically update as you type. Select an object and click the **Properties** button to view its property sheet:



You can select an object on either tab and then click the other tab to retain the choice and view it in that context. Double-click an object, or select it and click **OK**, to commit the selection and close the selection dialog.

## Moving, Copying, and Deleting Objects

Objects in the PowerDesigner working environment are easy to manipulate and to reuse from one model or package to another.

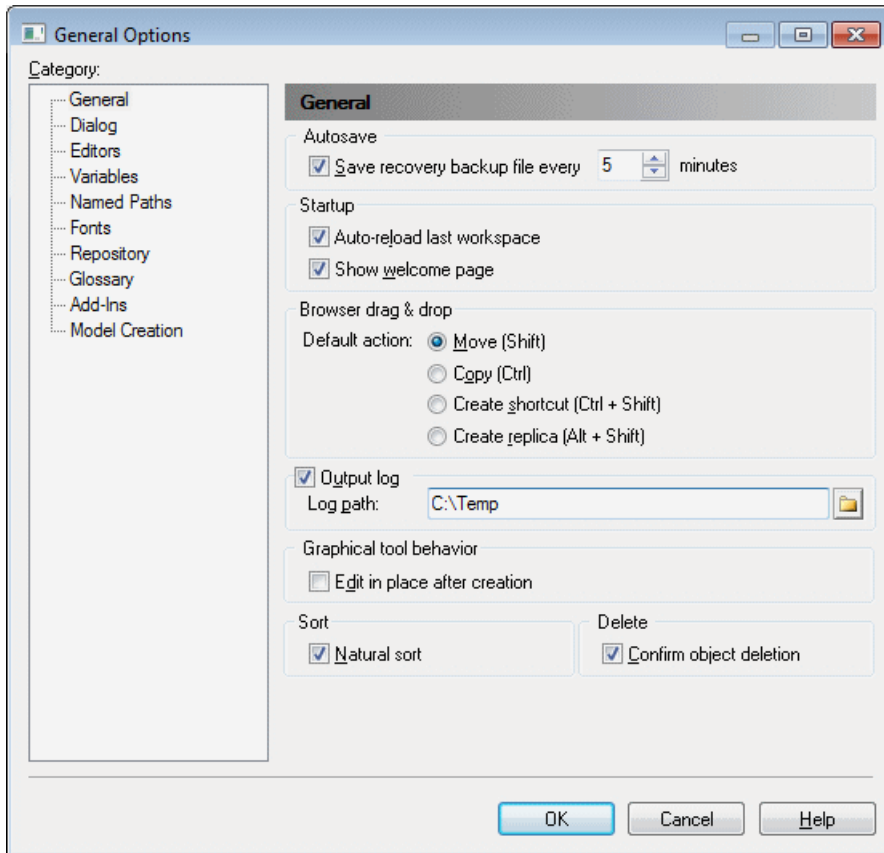
### Dragging and Dropping Objects

You can drag objects from one package or model to another to copy, move, or create a shortcut or replica. You can drag objects from the Browser, a diagram, an object list, or the Result List to the Browser or a diagram. By default, you perform a move when the start or drop point is the Browser or create a shortcut when dragging between diagrams. You can change this behavior temporarily, set a different default, or right-click and drag to obtain a contextual menu listing all the available drop actions.

To temporarily change the behavior; press and hold the following keys while dragging:

- **Shift** - Move
- **Ctrl** - Copy
- **Shift+Ctrl** - Create shortcut (see *Creating Shortcuts* on page 457)
- **Shift+Alt** - Create replica (see *Creating Replicas* on page 463)

To modify the default Browser drag and drop behavior, select **Tools > General Options** and select the appropriate radio button:



To obtain any behavior without modifier keys, right-click and drag. When you release the right mouse button, a contextual menu opens listing all the available drop actions.

## Copying and Pasting Objects

You can copy objects from the Browser, a diagram, an object list, or the Result List and paste them into the Browser, a diagram, or an object list. Symbols can be pasted as images into MS Word or image applications, while lines from object lists or the Result List can be pasted in CSV format into Excel, Word, or other text editors.

**Note:** To create a graphical synonym of a symbol, which is merely a second instance of the object in the diagram to improve readability or reduce link lengths, see *Creating Graphical Synonyms for Object Symbols* on page 199

1. To copy one or more objects, select them, and then:

- Select **Edit > Copy** from the menu bar.
- Press **Ctrl+C**.
- Right-click and select **Edit > Copy**.

---

**Note:** You can copy an object by drag and drop by holding down the **Ctrl** key as you drop it, or copy it as a shortcut by holding down **Ctrl+Shift** (see *Dragging and Dropping Objects* on page 122).

---

2. Click in the place where you want to paste the object and then:
  - Select **Edit > Paste** from the menu bar.
  - Press **Ctrl+V**.
  - Right-click and select **Edit > Paste**.
  - [to paste as a shortcut] Select **Edit > Paste As Shortcut** from the PowerDesigner menu bar, or right-click and select **Edit > Paste As Shortcut**. For more information, including the rules governing the creation of shortcuts, see *Chapter 15, Shortcuts and Replicas* on page 455.

When you copy an object, you also copy its child objects, and any references to other objects. For example, if you copy a CDM entity, you also copy its attributes and any references to business rules attached to that entity. When you paste an object, you transfer all of its properties from the Clipboard and create a new object, and not a graphical synonym or a new instance of the copied object.

When you paste in PowerDesigner, the creation of the object must not violate name uniqueness rules (see *Object Namespaces* on page 107). If an object with the same name and code already exists in the model or package, PowerDesigner will append a number to the name and code, and display a message in the Output pane to warn you that the object was renamed.

---

**Note:** When a paste conflict occurs on a CDM entity, the copied entity is given a new name and code and, if the **Allow Reuse** model option is not selected, new attributes will be created, with the same names as those being copied. If the **Unique Code** model option is not selected, the codes because they are in the context of the new entity) a new identifier is created (which will have the same name renamed according to the data item options set in the model).

---

### **Deleting Objects**

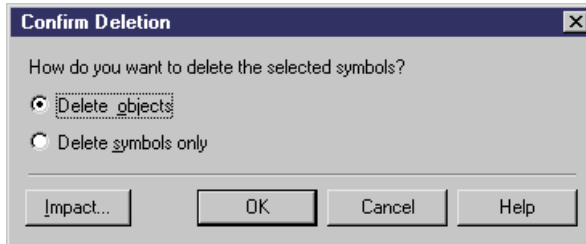
You can delete an object from a diagram, the Browser, or an object list.

Since PowerDesigner gives you the freedom to create multiple symbols in multiple diagrams to represent the same object, when deleting a symbol in a diagram, you can choose to delete just the symbol or the entire object.

When you delete an object, you also delete any sub-objects it contains (for example, when you delete a table from a PDM, you delete its columns, keys, triggers and indexes), along with all its diagram symbols. If you delete an object that is connected to another object via a link, the link is also deleted.

To delete an object, do one of the following:

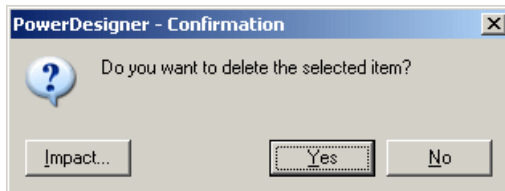
- Select its symbol in a diagram and press the **Del** key or right click it and select **Edit > Delete**. A dialog will open asking you whether you want to delete the object itself (including any sub-objects it contains) or just the symbol:



You can review the impact that deleting the object would have on other objects in your environment by clicking the **Impact** button on the confirmation dialogs (see *Chapter 17, Impact and Lineage Analysis* on page 499). You can undo a deletion by clicking the **Undo** tool.

Make your choice and click **OK**. If you delete only the symbol, you can restore it to the diagram, by selecting **Symbol > Show Symbols** and reselecting the object in the Show Symbols dialog.

- Select its symbol in a diagram and press **Shift+Del**. The object, any sub-objects it contains, and any associated diagram symbols will be deleted immediately without the need for confirmation.
- Select it in the Browser and press the **Del** key or right click it and select **Edit > Delete**. A dialog will open asking you to confirm the deletion:



Click **OK** to delete the object, any sub-objects it contains, and any associated diagram symbols.

- Select it in an object list and click the **Delete** tool or press the **Del** key. The object, any sub-objects it contains, and any associated diagram symbols will be deleted immediately without the need for confirmation.

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**Note:** You can suppress the display of the Confirmation dialogs by deselecting the **Confirm Object Deletion** general option (see *General Options* on page 255).

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### *Deleting Domains and Data Items*

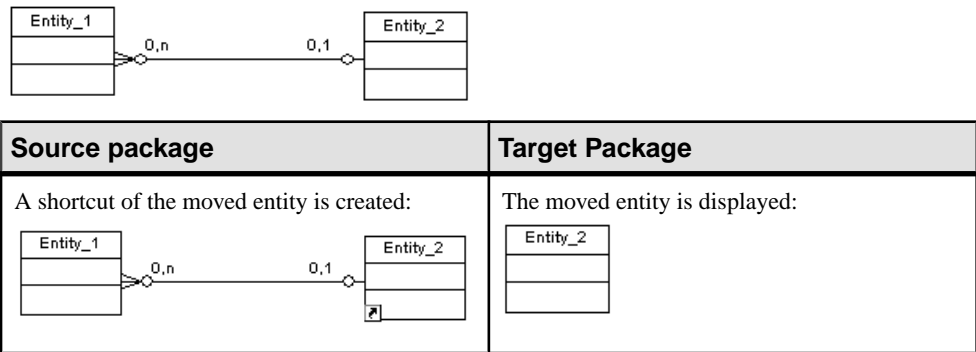
If you have specified that domains and data items can be reused by multiple objects in a CDM or PDM and you delete a parent object to which they belong, these sub-objects will not be deleted with their parent. For more information, see *Data Modeling*.

**Moving Objects from One Package to Another**

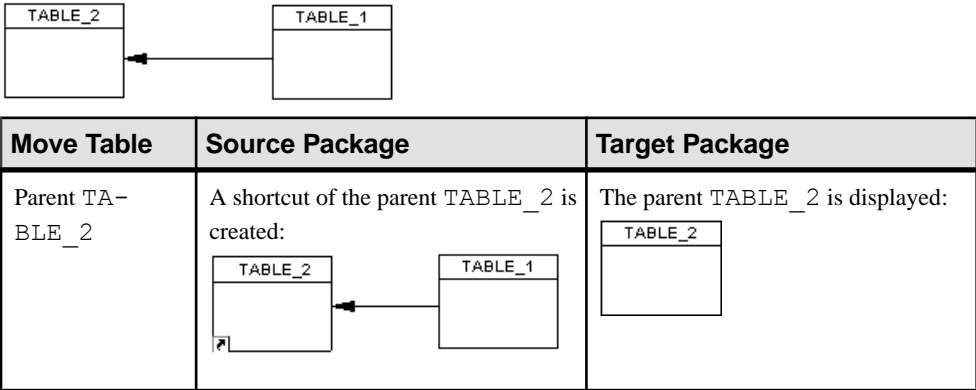
You can move objects from one package to another by drag and drop or cut and paste. Moving an object does not involve copying it, but a shortcut will be created in the original model or package, which points to the object's new location. You can only move an object to a model that supports this kind of object, and global objects (such as business rules, domains, storages etc.) cannot be moved into packages.

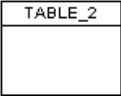
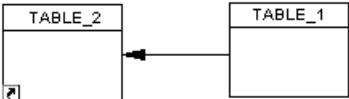
When you move an object from a package to another, linking objects that you move keep their links in the target package and a shortcut is usually created in the source package. The general rule being that conceptual modeling must be preserved.

When you move an object with a non-oriented link:



When you move an object with an oriented link:



Move Table	Source Package	Target Package
Child TABLE_1	Only the parent TABLE_2 is displayed: 	The child TABLE_1 is displayed with the reference link and a shortcut is created for the parent TABLE_2. 

When moving CDM entities containing data items, the data items will be moved to the new package or model with the entity unless they are reused by other entities, in which case copies will be made.

For more information about shortcut and copy rules, see *Creating Shortcuts* on page 457.

## Finding Objects

PowerDesigner lets you search for objects within all the models currently open in your workspace.

**Note:** For information about searching in the repository and PowerDesigner Portal, see *Finding Objects in the Repository* on page 332 and *PowerDesigner Portal Search* on page 344.

1. Select **Edit > Find Objects** (or press **Ctrl+F**) to open the Find Objects dialog.
2. Specify the appropriate constraints on these tabs:
  - **Name and Location** - to search on the name and location of PowerDesigner objects.
  - **User and Date** - to search on the user and date of creation/modification of PowerDesigner objects.
  - **Advanced** - to search on other criteria.
  - **Glossary** - to search on keywords, terms, related terms, and synonyms.

For detailed information about these tabs, see *Find Parameters* on page 128.

3. Click **Find Now**.

**Note:** Once you have started the Find Objects process, you can stop it at any time by clicking the **Stop** button.

The Find Object dialog remains open, displaying messages in the Output pane, until the end of the process, when the Result List displays the result:

Object Type	Name	Code	Location
Column	Employee::Empl...	EMPLOYEE::E...	Project Management (PDM)
Column	Employee::Emp...	EMPLOYEE::E...	Project Management (PDM)
Column	Employee::Empl...	EMPLOYEE::E...	Project Management (PDM)
Column	Employee::Empl...	EMPLOYEE::E...	Project Management (PDM)
Column	Project::Employee...	PROJECT::EMP...	Project Management (PDM)
Column	Participate::Empl...	PARTICIPATE::...	Project Management (PDM)
Column	Member::Employ...	MEMBER::EMP...	Project Management (PDM)
Column	Used::Employee...	USED::EMPNUM	Project Management (PDM)

Right-click an object in the list to find it in a diagram or the Browser, to open its property sheet or perform an impact and lineage analysis on it.

The following operations are available by right-clicking an object in the Results List:

- **Properties** - to open the object's property sheet (see *Object Properties* on page 98).
- **Impact and Lineage Analysis** - to analyze the object (see *Chapter 17, Impact and Lineage Analysis* on page 499).
- **Find in Browser** - to highlight the object in the Browser (see *Chapter 2, The Browser* on page 35).
- **Find in Diagram** - to open the diagram (see *Diagrams* on page 169) with the symbol centered. If the object has symbols in multiple diagrams, you see a list. If the object has no symbol, a warning message appears.
- **Copy** - to copy the object (see *Copying and Pasting Objects* on page 123). Select a destination in the Browser or a diagram and select **Edit > Paste** or **Edit > Paste as Shortcut**.

## Find Parameters

The Find Objects dialog contains tabs that let you precisely specify your search criteria.

### *Name and Location Tab*

The **Name & Location** tab provides basic search parameters:

Parameter	Description
Look in	Specifies the scope of the search. You can select the entire workspace, a project, folder, model, or package.
Model type	Specifies the type of PowerDesigner model to search. The options available in this list are affected by your choice in the Look in field.
Object type	Specifies the type of model objects to be searched. The options available in this list are affected by your choice in the Model type field.



Parameter	Description
Include shortcuts	Instructs PowerDesigner to include object shortcuts that match your criteria in the results.
Name	<p>Specifies the object name to search for. You can use the following special characters:</p> <ul style="list-style-type: none"> <li>• * - none to any number of characters. For example: <ul style="list-style-type: none"> <li>• W* finds "Work" and "Washington"</li> <li>• *96 finds "01/11/96" and "26/08/96"</li> </ul> </li> <li>• ? - exactly one character. For example: <ul style="list-style-type: none"> <li>• *_emp_??? finds "Div_emp_idn" but not "Div_emp_ident"</li> </ul> </li> <li>• \ - escapes *, ?, or \. For example: <ul style="list-style-type: none"> <li>• \?\\ - finds ?\</li> </ul> </li> <li>• true/false - Boolean value (True is when the check box is selected)</li> </ul>
Code	Code of the object. You can type the exact code of the object or use a string expression.
Case sensitive	Specifies that the results must match the case of the criteria.

### *User and Date Tab*

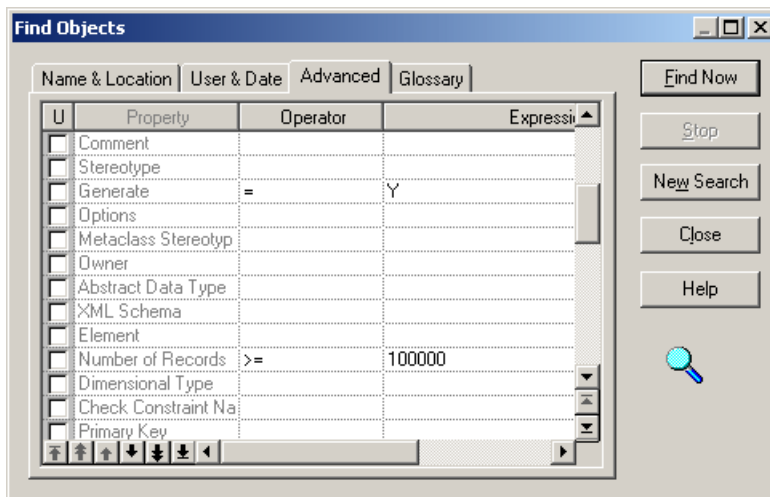
The **User & Date** tab lets you constrain your search based on when and by whom the object was created and modified:

Parameter	Description
Created	<p>Enables searching on creation parameters. You can search against the name of the user who created the object and against the creation date using the following options:</p> <ul style="list-style-type: none"> <li>• Before the specified date</li> <li>• After the specified date</li> <li>• Between the two specified dates</li> <li>• In the specified number of days since today</li> </ul>
Modified	Enables searching on modification parameters.

### *Advanced Tab*

The **Advanced** tab allows you to specify additional search constraints for each property of the selected object type in the following format:

Parameter	Description
U (Used)	Specifies a property on which to apply the search. Select this option for a property without entering an expression to find objects for which the property is null.
Operator	Specifies an operator to use for the search. Click in the Operator column to display the list of available operators.
Expression	Specifies a string expression to search for. For detailed information about the operators and the expression syntax, see <i>Defining a Filter Expression</i> on page 116.



**Note:** If you do not select an object type on the **Name & Location** tab, then you can only search on the name and code properties on this tab.

### Glossary Tab

The **Glossary** tab allows you to specify additional search constraints in relation to glossary objects (see *The Glossary* on page 36) with which objects may be associated:

Parameter	Description
Search by	Specifies that the objects searched for must be associated with a glossary object whose name contains the specified string.
Search Range	Specifies the glossary objects to search on. You can select one or more of <b>Key-words</b> , <b>Terms</b> [default], <b>Related Terms</b> , and <b>Synonyms</b> .
Case sensitive	Specifies that the search string must match the case of the glossary object.

## Business Rules

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A business rule is a rule that your business follows. It is a written statement specifying what an information system must do or how it must be structured. It could be a government-imposed law, a customer requirement, or an internal guideline.

Business rules often start as simple observations, for example "customers call toll-free numbers to place orders." During the design process they develop into more detailed expressions, for example what information a customer supplies when placing an order or how much a customer can spend based on a credit limit.

You can attach business rules to your model objects to guide and document the creation of your model. For example, the rule "an employee belongs to only one division" can help you graphically build the link between an employee and a division.

Business rules complement model graphics with information that is not easily represented graphically. For example, some rules specify physical concerns in the form of formulas and validation rules. These technical expressions do not have a graphical representation.

In the case of the PDM and OOM, you can generate business validation rules attached to domains as check parameters.

Before you create business rules, formulate your rules by asking yourself the following questions:

- What business problems do I want to address?
- Are there any procedures that my system must respect?
- Do any specifications dictate the scope of my project?
- Do any constraints limit my options?
- How can each of these procedures, specifications, and constraints be described?
- How can each of these descriptions be classified? Possible classifications are definitions, facts, formulas, requirements or validation rules

## Creating a Business Rule

You can create a business rule from the **Model** menu, from the Browser or from a property sheet.

- Select **Model > Business Rules** to access the List of Business Rules, and click the **Add a Row** tool.
- Right-click the model or package in the Browser, and select **New > Business Rule**.
- Open the property sheet of the object to which you want to apply the rule, click the Rules tab, and click the **Create an Object** tool.

## Business Rule Properties

You can modify an object's properties from its property sheet. To open a business rule property sheet, double-click its Browser entry in the Business Rules folder. The following sections

## CHAPTER 4: Objects

detail the property sheet tabs that contain the properties most commonly entered for business rules.

The General tab contains the following properties:

Property	Description
Name/Code/ Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Type	<p>Specifies the nature of the business rule. You can choose between:</p> <ul style="list-style-type: none"><li>• Constraint – a check constraint on a value. In a PDM, constraint business rules can be generated in the database. For example, "The start date should be inferior to the end date of a project."</li><li>• Definition – a property of the element in the system. For example; "A customer is a person identified by a name and an address".</li><li>• Fact – a certainty in the system. For example, "A client may place one or more orders".</li><li>• Formula – a calculation. For example, "The total order is the sum of all the order line costs".</li><li>• OCL constraint [OOM only] – An Object Constraint Language expression.</li><li>• Requirement – a functional specification. For example, "The model is designed so that total losses do not exceed 10% of total sales".</li><li>• Validation – a constraint on a value. For example, "The sum of all orders for a client must not be greater than that client's allowance".</li></ul>

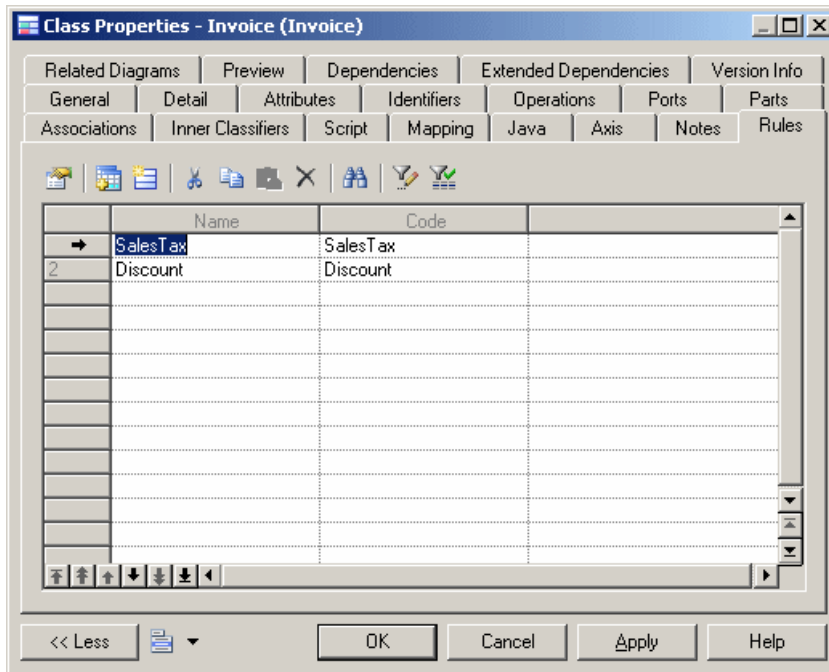
The following tabs are also available:

- Expression Tab - Though business rules typically start out as descriptions, as you develop your model and analyze your business problem, you can enrich them by adding technical expressions on this tab. Expressions are used primarily in CDMs and PDMs. Each rule can include two types of expression, which you define on the appropriate sub-tab:
  - Server
  - Client
- OCL Constraint Tab - This tab is only available for business rules with a type of OCL Constraint. The Object Constraint Language is the UML expression language. Enter your OCL expression in the text field.

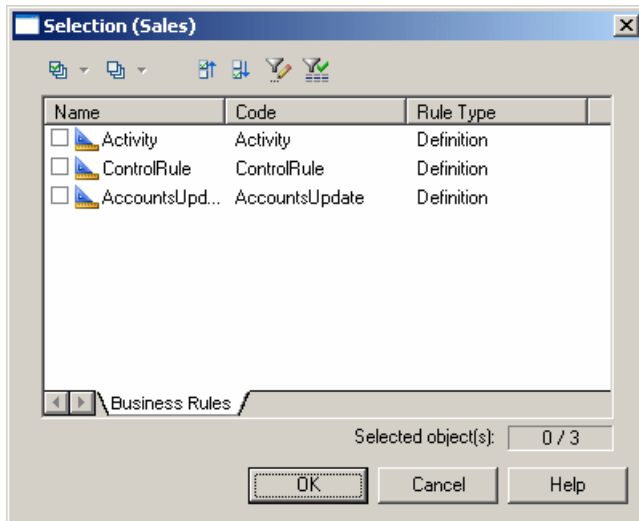
## Applying a Business Rule to a Model Object

You can apply business rules that you have created to your model objects.

1. Open the property sheet of an object, and then click the Rules tab:



2. Click the Add Rules tool to open a selection window listing all the business rules available in the model:



3. Select the business rules you want to add to the object, and then click OK to return to the object's property sheet.
4. Click OK to close the object property sheet and return to the model.

---

**Note:** When you apply a business rule to an object, its U (Used) column in the List of Business Rules is automatically checked. This column allows you to see what rules are unused, and delete them if necessary.

---

## File Objects

A file object is a representation in a PowerDesigner model of an external application file (for example, a Java file, script SQL, or MS Word file). The file itself can be kept external to the model or embedded within and saved with it.

For example you could:

- Attach a file object to any PowerDesigner object to enrich its description
- Attach a generated OOM class to a target Java file

You open the file in its associated editor by double-clicking its diagram symbol or browser entry. To change the associated editor, right-click the file object and select **Open With > Choose Program** (see *Text Editors* on page 258).

## Creating a File Object

You can create a file object from the Toolbox, Browser, or **Model** menu.

- Use the **File** tool in the Toolbox.
- Select **Model > Files** to access the List of Files, and click the **Add a Row** tool.

- Right-click the model or package in the Browser, and select **New > File**.
- Drag a file from Windows Explorer and drop it in the diagram or Browser.

## File Object Properties

To view or edit a file object's properties, double-click its diagram symbol or Browser or list entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator.

Property	Description
Name/Code/ Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Location type	Specifies the nature of the file object. You can choose from the following: <ul style="list-style-type: none"> <li>• Embedded file – the file is stored within the model and is saved when you save the model. If you subsequently change the type to external, you will be warned that the existing contents will be lost.</li> <li>• External file – the file is stored in the Windows file system, and you must enter its path in the Location field. If you subsequently change the type to embedded, you will be prompted to import the contents of the file into the model.</li> <li>• URL – the file is on the web and you must enter its URL in the Location field</li> </ul>
Location	[External and URL types only] Specifies the path or URL to the file.
Extension	Specifies the extension of the file object, which is used to associate it with an editor. By default, the extension is set to <code>txt</code> .
Generate	Specifies to generate the file object when you generate the model to another model.
Artifact	Specifies that the file object is not a piece of documentation, but rather forms an integral part of the application.  If an artifact has an extension that is defined in the Editors page in the General Options dialog linked to the <code>&lt;internal&gt;</code> editor, a Contents tab is displayed in the artifact property sheet, which allows you to edit the artifact file in the PowerDesigner text editor.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

## Attaching a File to a Model Object

You can attach file objects to other model objects through traceability links.

- Right-click an object symbol in the diagram and select **Edit > File > Add File**.
- Use the **Link/Traceability Link** tool in the toolbox to draw a link from the object symbol to the file object symbol.
- Select the **Traceability Links** tab of the object property sheet, click the **Add Objects** tool, select the file, and click **OK** (see *Creating Traceability Links* on page 431).

The connection between the object and the file object takes the form of a traceability link, and is visible:

- In the form of a link in the diagram.
- On the **Dependencies** tab of the file object property sheet and on the **Traceability Links** tab of the dependent object property sheet.
- Under the **File** command in the contextual menu of the dependent object symbol.

## Extended Objects, Sub-Objects, and Links

Extended objects, sub-objects, and links let you model concepts that are not natively supported by PowerDesigner. For example, you can add extended objects to a PDM to model new database objects. You can specify generated files and templates in the definition of your extended objects in order to enable their generation and reverse-engineering.

Extended objects and extended links are available by default in the free model (see *Chapter 6, The Free Model (FEM)* on page 219), and can be added to any other type of model through the Profile category in the model's resource file or in an extension file (see *Customizing and Extending PowerDesigner > Extension Files*).

To view or edit an extended object's properties, double-click its diagram symbol or Browser or list entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator.

Property	Description
Name/Code/ Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Source	[extended links only] Specifies the name of the origin object of the extended link.



Property	Description
Destination	[extended links only] Specifies the name of the destination object of the extended link.
Stereotype	Extends the semantics of the object. You can enter a stereotype directly in this field, or add stereotypes to the list by specifying them in an extension file.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

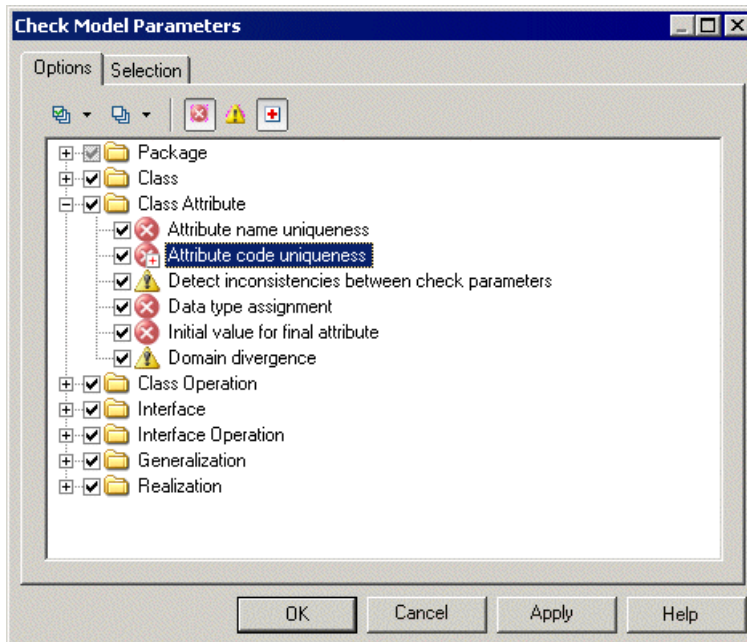
**Note:** You can use the *CanLinkKind* event handler to restrict the kind of objects you want to link together. This event handler is called when you create a link using the Toolbox tool or when you try to modify the ends of a link from its property sheet. For more information, see *Customizing and Extending PowerDesigner > Extension Files > Event Handlers (Profile)*.

## Checking Models

You can check the validity of your model at any time. We recommend that you check your model before generating code or another model from it. The Check model option is enabled by default in the Generate dialog box and, if an error is found, the generation is stopped.

1. Press F4, select **Tools > Check Model**, or right-click the diagram background and select **Check Model** to open the Check Model Parameters dialog.

The **Options** tab lists the types of objects to be checked, and the individual checks to be performed are displayed with symbols indicating their severity:

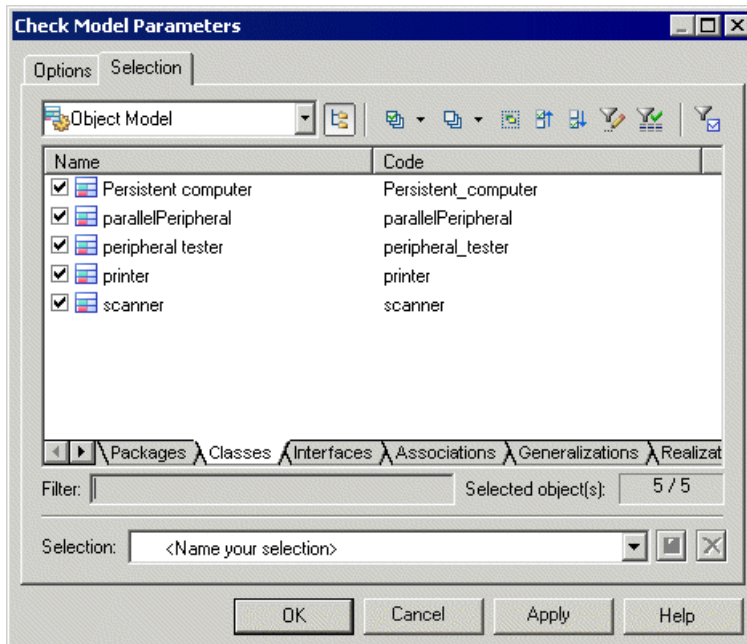


2. [optional] Select or deselect types of objects to check, and expand object nodes to enable, disable, vary the severity of, and enable or disable automatic correction of individual checks with the following tools:

Tool	Description
	Select All – Click the arrow to select all checks, all error checks, or all warning checks.
	Deselect All - Click the arrow to deselect all checks, all error checks, or all warning checks.
	Error – Sets the selected check to error level. When errors are encountered, any model generation is stopped.
	Warning - Sets the selected check to error level. Warnings do not allow model generation to proceed.
	<p>Automatic correction – [if available for the selected check] Enables automatic correction for the selected check and places a small red cross on the bottom-right corner of the check icon.</p> <p>Automatic corrections may have unexpected effects, and you might want to disable them in some cases. For example, in a PDM, if a column code length is longer than the length specified in the DBMS MaxColumnLen entry, then PowerDesigner will truncate the code, but may also change the code to avoid duplicating an existing code.</p>

**Note:** Right-click a check and select **Help** to display its documentation.

3. [optional] Click the **Selection** tab, and select or deselect individual objects for checking. Sub-tabs are available for each type of object:



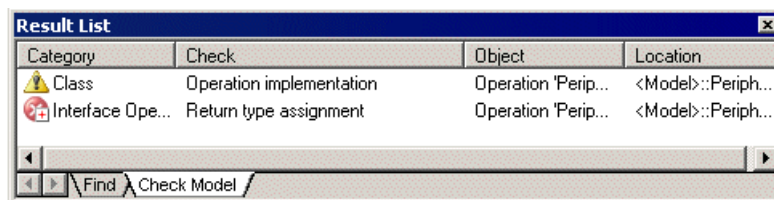

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**Note:** If you had previously selected symbols in your diagram, you can select them for checking with the **Use Graphical Selection** tool. For detailed information about these tools, see *Adding an Item from a Selection List* on page 118.

---

4. Click **OK** to begin the model check.

The Check Model Result List displays errors and warnings based on the check options you have defined. For information about how to correct errors, see *Correcting Errors in the Check Model Result List* on page 139.











## Correcting Errors in the Check Model Result List

When errors and warnings are encountered during model checking, they are listed in the Check Model Result List pane. You can correct the problems either by invoking an automatic

## CHAPTER 4: Objects

correction (if available) or by opening the property sheet of the affected object and correcting it manually.

The following tools are available to assist you in correcting problems with your model. If this toolbar is not displayed, select **Tools > Customize Toolbars**, select Check, and click OK.

Tool	Description
	Correct error – Opens the property sheet of the affected object to allow you to correct the error.
	Display help – Provides documentation for the error or warning.
	Check again – Re-performs the check, to allow you to verify your correction.
	Automatic correction – Only available if an automatic correction is defined for this kind of error. Performs the automated correction.
	First error – Goes to the first error in the list.
	Previous error - Goes to the previous error in the list.
	Next error - Goes to the next error in the list.
	Last error - Goes to the last error in the list.

**Note:** These and other options are also available by right-clicking an item in the Check Model Result List.

### Checking Generic Objects

Generic objects are available in all types of models and have standard checks defined for them. For model-specific checks, see the appropriate modeling guide.

#### **Business Rule Checks**

PowerDesigner provides default model checks to verify the validity of business rules.

Check	Description and Correction
Name/Code contains terms not in glossary	[if glossary enabled] Names and codes must contain only approved terms drawn from the glossary. <ul style="list-style-type: none"><li>Manual correction - Modify the name or code to contain only glossary terms.</li><li>Automatic correction - None.</li></ul>

Check	Description and Correction
Name/Code contains synonyms of glossary terms	<p>[if glossary enabled] Names and codes must not contain synonyms of glossary terms.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the name or code to contain only glossary terms.</li> <li>Automatic correction - Replaces synonyms with their associated glossary terms.</li> </ul>
Name/Code uniqueness	<p>Object names must be unique in the namespace.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the duplicate name or code.</li> <li>Automatic correction - Appends a number to the duplicate name or code.</li> </ul>
Unused business rule	<p>The business rule you have created is not used in the model.</p> <ul style="list-style-type: none"> <li>Manual correction: Apply the business rule to an object in the model</li> <li>Automatic correction: None</li> </ul>

### **Extended Object/Link Checks**

PowerDesigner provides default model checks to verify the validity of extended objects/links.

Check	Description and Correction
Name/Code contains terms not in glossary	<p>[if glossary enabled] Names and codes must contain only approved terms drawn from the glossary.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the name or code to contain only glossary terms.</li> <li>Automatic correction - None.</li> </ul>
Name/Code contains synonyms of glossary terms	<p>[if glossary enabled] Names and codes must not contain synonyms of glossary terms.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the name or code to contain only glossary terms.</li> <li>Automatic correction - Replaces synonyms with their associated glossary terms.</li> </ul>
Name/Code uniqueness	<p>Object names must be unique in the namespace.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the duplicate name or code.</li> <li>Automatic correction - Appends a number to the duplicate name or code.</li> </ul>

**File Checks**

PowerDesigner provides default model checks to verify the validity of files.

Check	Description and Correction
Name/Code contains terms not in glossary	<p>[if glossary enabled] Names and codes must contain only approved terms drawn from the glossary.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the name or code to contain only glossary terms.</li> <li>Automatic correction - None.</li> </ul>
Name/Code contains synonyms of glossary terms	<p>[if glossary enabled] Names and codes must not contain synonyms of glossary terms.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the name or code to contain only glossary terms.</li> <li>Automatic correction - Replaces synonyms with their associated glossary terms.</li> </ul>
Name/Code uniqueness	<p>Object names must be unique in the namespace.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the duplicate name or code.</li> <li>Automatic correction - Appends a number to the duplicate name or code.</li> </ul>
Existence of external file location	<p>External file objects should have a valid path location.</p> <ul style="list-style-type: none"> <li>Manual correction: Define a valid path location</li> <li>Automatic correction: None</li> </ul>

**Replication Checks**

PowerDesigner provides default model checks to verify the validity of replications.

Check	Description and Correction
Partial replication	<p>A replica object is partially synchronized with its replicated object.</p> <ul style="list-style-type: none"> <li>Manual correction: Modify the list of replicated attributes from the replication property sheet</li> <li>Automatic correction: Enforces the replication of desynchronized attributes of the replica object in the replication property sheet</li> </ul>

**Checking Glossary Compliance**

When you enable the use of glossary terms for your object naming conventions, additional model checks help you monitor glossary compliance for object names and automate the replacement of unapproved synonyms with approved glossary terms. You can restrict the

scope of your compliance efforts by disabling the checks for certain object types on a model-by-model basis.

The following checks are enabled for all model objects when you select **Use glossary for autocompletion and compliance checking** for your naming conventions (see *Naming Conventions* on page 143):

Check	Description and Correction
Name/Code contains terms not in glossary	<p>[if glossary enabled] Names and codes must contain only approved terms drawn from the glossary.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the name or code to contain only glossary terms.</li> <li>Automatic correction - None.</li> </ul> <p>To disable this check for a given object type, clear its check box in the tree in the <b>Check Model Parameters</b> dialog. To reduce its severity from Error to Warning, right-click the check and select <b>Warning</b>. The check icon changes to a warning sign.</p>
Name/Code contains synonyms of glossary terms	<p>[if glossary enabled] Names and codes must not contain synonyms of glossary terms.</p> <ul style="list-style-type: none"> <li>Manual correction - Modify the name or code to contain only glossary terms.</li> <li>Automatic correction - Replaces synonyms with their associated glossary terms.</li> </ul> <p>To enable the automatic replacement of synonyms with approved glossary terms for a given object type, right-click the check in the <b>Check Model Parameters</b> dialog, and select <b>Automatic Correction</b>. A small overlay with a red cross appears at the bottom-right of the check icon.</p>

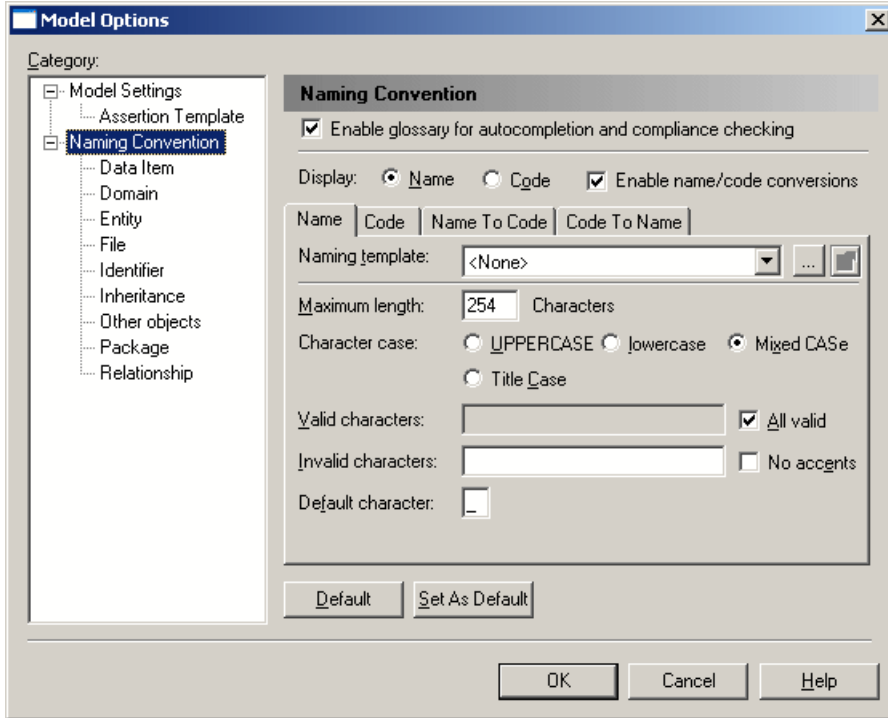
In addition, the following check is enabled for models and packages to allow administrators to add terms used in object names to the glossary:

Check	Description and Correction
List of missing terms in object names/codes in package	<p>[if glossary enabled] This special check lists all the terms that are used in the names or codes of all the objects contained in the model or package.</p> <ul style="list-style-type: none"> <li>Manual correction - An administrator with write permission on the glossary can double-click the line for this check in the <b>Result List</b> to open a merge window in which you can select to add some or all of these missing terms, as appropriate, to the glossary.</li> <li>Automatic correction - None.</li> </ul>

## Naming Conventions

You can use naming conventions to specify a case, maximum length, and valid characters for object names and codes, and enforce compliance with an enterprise glossary. You can also

invoke conversion scripts and conversion lists to generate appropriate object codes from names (or names from codes).



To set naming conventions to control the names and codes of all objects, select **Tools > Model Options** and click the **Naming Convention** node. To set naming conventions for a particular kind of object, select its node under the **Naming Convention** node.

These options are available only on the **Naming Convention** node and apply to all objects:

Option	Description
Use glossary for autocompletion and compliance checking	Enables the use of the enterprise glossary in the model. When this option is selected, auto-completion is enabled for object names and codes using the glossary terms (see <i>The Glossary</i> on page 36), and additional checks are made to ensure that all model objects use only approved glossary terms in their names and codes (see <i>Checking Glossary Compliance</i> on page 142).  For information about administering the glossary, see <i>Deploying an Enterprise Glossary</i> on page 541.
Display	Specifies whether object names or codes appear in the Browser and on diagram symbols. You can override this setting for diagram symbols by setting the appropriate display preferences (see <i>Display Preferences</i> on page 206).



Option	Description
Enable name/code conversions	<p>By default, when you enter an object name, the object code is autogenerated by applying the naming conventions specified on the <b>Code</b> subtab. Select this option to additionally apply the conversion scripts and conversion tables specified on the <b>Name to Code</b> tab (see <i>Name and Code Conversion Scripts</i> on page 146).</p> <p>You can decouple an object's code from its name by clicking to release the = button to the right of the <b>Code</b> field in the object property sheet and entering your own code (which will still be subject to the naming conventions). You can autogenerate a name from a code by clicking the = button to the right of the <b>Name</b> field.</p>

These options are available on both the **Name** and **Code** subtabs of the **Naming Convention** node (where they apply to all objects) and on each subnode (where they apply to the selected object):

Option	Description
Naming template	Specifies a naming template to supply the naming conventions for the name or code. A naming template contains the same fields as on this tab, but in a format that can be reused for other objects (see <i>Creating a Naming Template</i> on page 146). Click the ellipsis button to the right of this field to open the List of Naming Templates, or click the <b>Properties</b> tool to view and edit the selected template.
Maximum length	Specifies the maximum number of characters permitted in a name or code. In a PDM, you can set the maximum here and in the DBMS definition file. If you specify both, then PowerDesigner applies the stricter constraint. For example, if you set 128 here and the DBMS file specifies 30, PowerDesigner applies the 30 character limit.
Character case	<p>Specifies the case to apply to the name or code. You can choose between:</p> <ul style="list-style-type: none"> <li>• UPPERCASE</li> <li>• lowercase</li> <li>• Mixed CASE</li> <li>• Title Case (Name only)</li> <li>• UpperCamelCase (Code only)</li> <li>• lowerCamelCase (Code only)</li> </ul>
Valid characters	<p>Specifies the list of characters permitted in the name or code. Enter character ranges between single quotes, separated by a dash. Enter individual or multiple characters between double quotes. Separate valid items by a comma. By default, PowerDesigner allows the following valid characters for codes:</p> <p><code>'a'-'z', 'A'-'Z', '0'-'9', "_"</code></p> <p>Select <b>All valid</b> to the right of this field to permit any character.</p>

Option	Description
Invalid characters	<p>Specifies the list of characters not permitted in the name or code. By default, PowerDesigner excludes the following characters for names:</p> <p>"+-*/\.,!:;"</p> <p>Select <b>No accents</b> to the right of this field to remove accents from accented characters.</p>
Default character	Specifies the character that is used to replace any invalid characters that are entered.

## Creating a Naming Template

You can create a naming template to specify naming conventions for names or codes and reuse it for multiple types of objects.

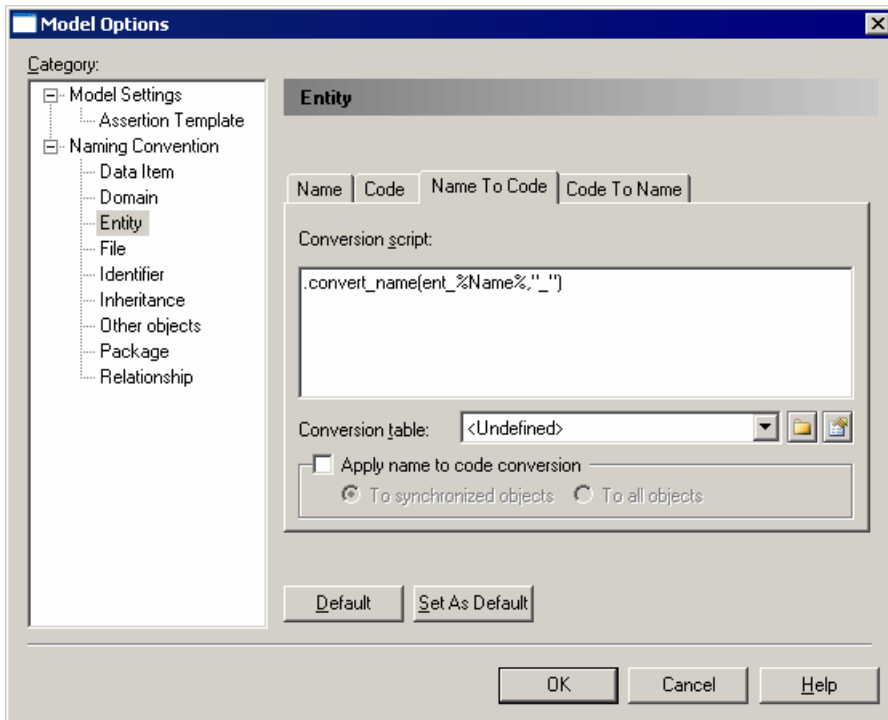
1. Select **Tools > Model Options** and click the **Naming Convention** node in the Category tree.
2. Click the Ellipsis button to the right of the **Naming Template** field to open the List of Naming Templates.
3. Click the **Add a Row** button and enter a name for the new naming template.
4. Click the **Properties** tool to open the template property sheet, complete all the appropriate properties (see *Naming Conventions* on page 143), and then click **OK** to return to the list.
5. Click **OK** to return to the Model Options page.

Your template is now available for selection in the **Naming Template** field. Click the **Properties** tool to the right of this field to modify the selected template.

## Name and Code Conversion Scripts

Conversion scripts permit more complex transformations, including adding prefixes or suffixes and the use of conversion tables. You specify the script on the **Name to Code** or **Code to Name** tab, depending on which direction you want to perform the conversion.

**Note:** To enable the use of your conversion script, you must select **Enable name/code conversions** in the upper part of the **Naming Convention** page of the Model Options dialog.



The following options are available on each of these tabs:

Option	Description
Conversion script	<p>The default Name to Code conversion script is:</p> <pre>.convert_name(%Name%, "_")</pre> <p>This script takes the value of the <b>Name</b> field (represented by the GTL variable %Name%) and generates a <b>Code</b> by replacing any nonalphanumeric characters with an underscore.</p> <p>It also calls a conversion table (if one is selected in the <b>Conversion table</b> field) to perform conversions on specific strings encountered in the name or code.</p> <p>You can modify the conversion script. For example, to insert the prefix tbl_ before the code of each table, use:</p> <pre>.convert_name(tbl_%Name%, "_")</pre> <p>If the stdnames conversion table is selected then, for a table with the name Customer, PowerDesigner automatically provides a code tbl_CUST.</p> <p>You can enter any valid GTL code (including macros such as .foreach_part, .lowercase, .uppercase, .replace, and .delete), but only the .convert_name and .convert_code macros call a conversion table if one is selected.</p> <p>For detailed information about GTL, see <i>Customizing and Extending PowerDesigner &gt; Customizing Generation with GTL</i>.</p>
Conversion table	<p>Specifies the conversion table to use to perform conversions on specific strings encountered in the name or code (see <i>Creating a Conversion Table</i> on page 149).</p> <p>PowerDesigner provides an example conversion table called stdnames.csv. For example, an object name Customer_1 is transformed into the object code CUST_1 if stdnames is selected.</p> <p>To use your glossary term names and codes (see <i>The Library</i> on page 39) as a conversion table, select glossary terms.</p>
Apply name to code conversion/ Apply code to name conversion to all objects	<p>Applies the conversion script (and conversion table) when you click <b>OK</b>:</p> <ul style="list-style-type: none"> <li>• <b>To synchronized objects</b> - those objects in which the object code is currently synchronized with the name.</li> <li>• <b>To all objects</b> - all objects in the model regardless of whether the object code is synchronized with the name.</li> </ul> <p>The option on the <b>Code to Name</b> tab always applies your changes to all objects in the model.</p>

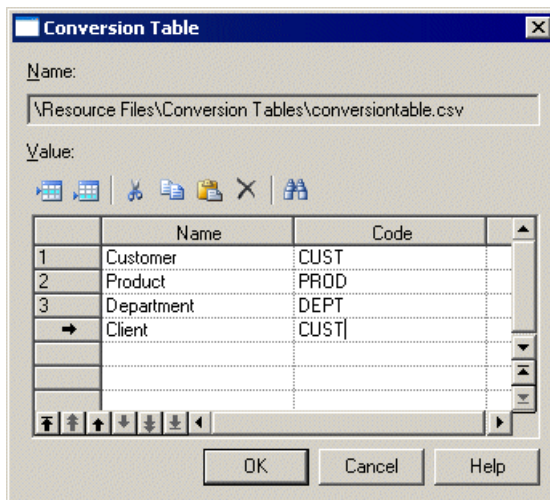
**Note:** When generating one model from another, you can use name to code conversion to provide appropriate codes for the target model objects (see the **Convert Names into Codes** options on the *Model Generation Options* on page 436).

## Creating a Conversion Table

Conversion tables are .csv files containing a list of strings that may appear in object names matched with equivalent (generally shorter) strings with which to replace them when generating object codes.

For example, each instance of the word `customer` could be converted to `cust`. To review the example conversion table provided with PowerDesigner navigate to and open `install_dir/Resource Files/Conversion Tables/stdnames.csv`.

1. Select **Tools > Resources > Conversion Tables** to open the List of Conversion Tables.  
To review an existing conversion table, select it in the list and click the **Properties** tool.
2. Click the **New** tool, enter a name and click **Save** to create the file and open the Conversion Table dialog.
3. Click the **Add a Row** tool and then enter a name and the code into which you want to convert it:



You can create as many conversion Name-Code pairs as required. The values in these columns are not case-sensitive.

**Note:** It may be that several different names are converted the same code. For example, `client` and `customer` may both be converted to `CUST`. If a table containing these lines were used to convert codes to names, then the first value encountered in the Name column is always used and there is a risk that multiple objects will be given the same name.

4. Click **OK** to return to the list of conversion tables, and then click **Close** to return to your model.

Your conversion table is now available to be selected in the Model Options dialog.

## .convert\_name and .convert\_code Macros

These macros convert the object name to its code (or vice versa) and can search for and apply values found in an associated conversion table.

Use the following syntax to convert a name to a code:

```
.convert_name (expression [, "separator" [, "delimiters" ]], case )
```

Use the following syntax to convert a code to a name:

```
.convert_code (expression [, "separator" [, "delimiters" ]])
```

The following parameters are available:

Parameter	Description
<b>expression</b>	Specifies the text to be converted. For .convert_name, this is generally the %Name % variable and may include a suffix or prefix. Type: Simple template
<b>separator</b>	[optional] Character generated each time a separator declared in <b>delimiters</b> is found in the code. For example, "_" (underscore). Type: Text
<b>delimiters</b>	[optional] Specifies the different delimiters likely to exist in the input code or name, and which will be replaced by <b>separator</b> . You can declare several separators, for example "_" and "-". Type: Text
<b>case</b>	[optional for .convert_name only] Specifies the case into which to convert the code. You can choose between: <ul style="list-style-type: none"> <li>firstLowerWord - First word in lowercase, first letters of subsequent words in uppercase</li> <li>FirstUpperChar - First character of all words in uppercase</li> <li>lower_case - All words in lowercase and separated by an underscore</li> <li>UPPER_CASE - All words in uppercase and separated by an underscore</li> </ul>

### Examples

In this example, the template is applied to class name Corporate Customer:

```
.convert_name (cls_%Name%[,,,FirstUpperChar])
```

Result:

```
clsCorporateCustomer
```

**Examples**

In this example, the template produces a list of column names before and after conversion:

```
.foreach_item(Columns)
  %Name%,
  .foreach_part(%Name%)
    .convert_name(%CurrentPart%,,,lower_case)
  .next()
.next(\n)
```

Result:

```
Column 1, column_1
Column 2, column_2
Column 3, column_3
```

**.delete and .replace Macros**

These macros delete or replace all instances of the given string in the text input.

```
.delete (string)
      block-input
.enddelete
```

```
.replace (string, new-string)
      block-input
.endreplace
```

The following parameters are available:

Parameter	Description
<b>string</b>	Specifies the string to be deleted. Type: Text
<b>new-string</b>	[.replace only] Specifies the string with which to replace <b>string</b> . Type: Text
<b>block-input</b>	Specifies the text to be parsed for instances of the <b>string</b> to delete or replace. Type: Complex template

Examples	Result
.delete(Get) GetCustomerName .enddelete	CustomerName
.replace(Get,Set) GetCustomerName .endreplace	SetCustomerName

Examples	Result
<pre>.replace(" ", _) Customer Name .endreplace</pre>	Customer_Name

### .foreach\_part Macro

This macro iterates over the parts of a string divided by a delimiter using the special %CurrentPart% local variable.

```
.foreach_part (input [,"delimiter" [,head [,tail]]])  
    output  
.next [ (separator) ]
```

The following parameters are available:

Parameter	Description
<b>input</b>	Specifies the text over which to iterate. Type: Simple template
<b>delimiter</b>	Specifies the sub-string that divides the input into parts. You can specify multiple characters including ranges. For example [A-Z] specifies that any capital letter acts as a delimiter.  By default, the delimiter is set to ' - _ , \t ' (space, dash, underscore, comma, or tab).  <b>Note:</b> The delimiter must be surrounded by single quotes if it contains a space. Type: Text
<b>head</b>	[optional] Specifies text to be generated before the output, unless there is no output. Type: Text
<b>tail</b>	[optional] Specifies text to be generated after the output, unless there is no output. Type: Text
<b>output</b>	Specifies the text to output for each part in the input. Type: Complex template
<b>separator</b>	[optional] Specifies text to be generated between each part of <b>output</b> . Type: Text

For example:



Examples
<p>This template is applied to My class:</p> <pre>.foreach_part (%Name%) %.FU:CurrentPart% .next</pre> <p>Result:</p> <p>MyClass</p>
<p>This template is applied to My class:</p> <pre>.foreach_part (%Name%, ' - ', tbl_) %.L:CurrentPart% .next(_)</pre> <p>Result:</p> <p>tbl_my_class</p>
<p>This template is applied to MyClass:</p> <pre>.foreach_part (%Name%, [A-Z]) %.L:CurrentPart% .next(-)</pre> <p>Result:</p> <p>my-class</p>

## Spell Checking

You can spell check your PowerDesigner models if you have MS Word 2000 or higher installed on your machine, and if your system code page is consistent with the model language. For example, for the spell checker to work properly on a Chinese model, your system code page should be Chinese.

**Note:** You must enable the Spell Checker add in before use. To do so, select **Tools > General Options**, click the Add-Ins category, and select the Spell Checker add in in the list, then click **OK** to return to your model. To set preferences, select **Tools > Spell Checking Options** and choose the model objects properties for which you want to check the spelling. If you select **Check sub-objects**, then all the child objects of any object you check will also be checked. You can also specify the dictionary language to use when spell checking.

1. Right-click an object or a model node in the Browser and select **Spell Check**. If an error is found the Spell Checking dialog opens.
2. For each error, you can:
  - Click **Change** to accept the suggested replacement word.

- Type your own replacement and click **Change**
- Click **Change All** to apply the change to the entire object or model.
- Click **Add** to add the word to your custom dictionary

A message is displayed to inform you that spell checking is successful.

## Extending Objects

---

PowerDesigner includes powerful tools to extend and customize your modeling objects. Many extensions are defined in the resource files that are provided with PowerDesigner to support a particular language or DBMS, and you can add your own to add new attributes and attribute lists to objects, create entirely new objects, and customize object generation.

---

**Note:** Many extended attributes are displayed in standard or custom property sheet tabs, but if any are not so assigned, an **Extended Attributes** tab will be displayed, listing all the extended attributes in alphabetical order and giving their datatypes, values, and a column, **[R]edefined**, in which the checkbox is selected if you have modified the attribute's default value.

---

For detailed information about working with extensions, see *Customizing and Extending PowerDesigner > Extension Files*.

## Adding New Properties to an Object

---

To quickly add new attributes and collections to an object or to customize its property sheet, use the commands available from the property sheet menu. Extensions added to an object are immediately available for all other objects of that type in the model.

### **Adding a New Attribute to an Object**

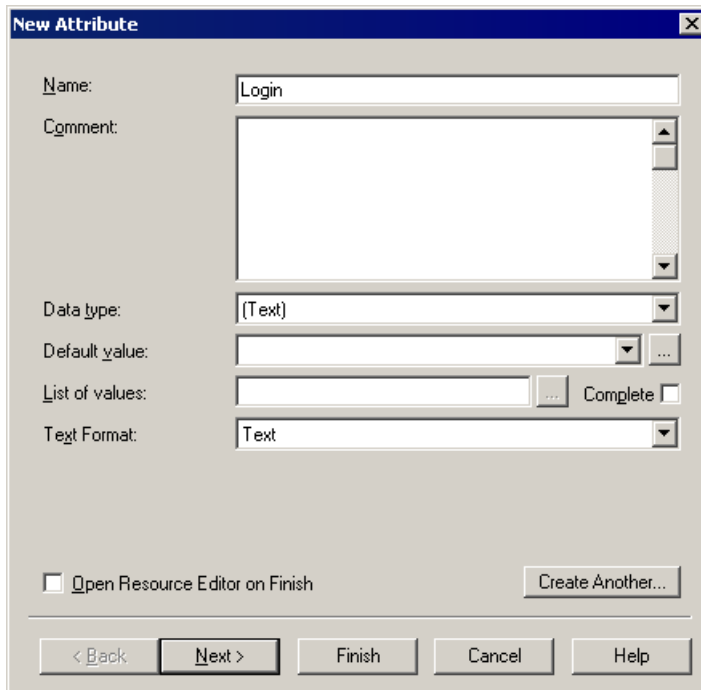
The PowerDesigner metamodel specifies the attributes available by default for an object (for example, name and comment). To quickly extend the metamodel and add a new attribute from an object property sheet, click the menu button, and select **New Attribute**. The new attribute is immediately available on all objects of this type.

---

**Note:** The definition of the new attribute is stored in a PowerDesigner extension file. For detailed information about working with these files, see *Customizing and Extending PowerDesigner > Extension Files*.

---

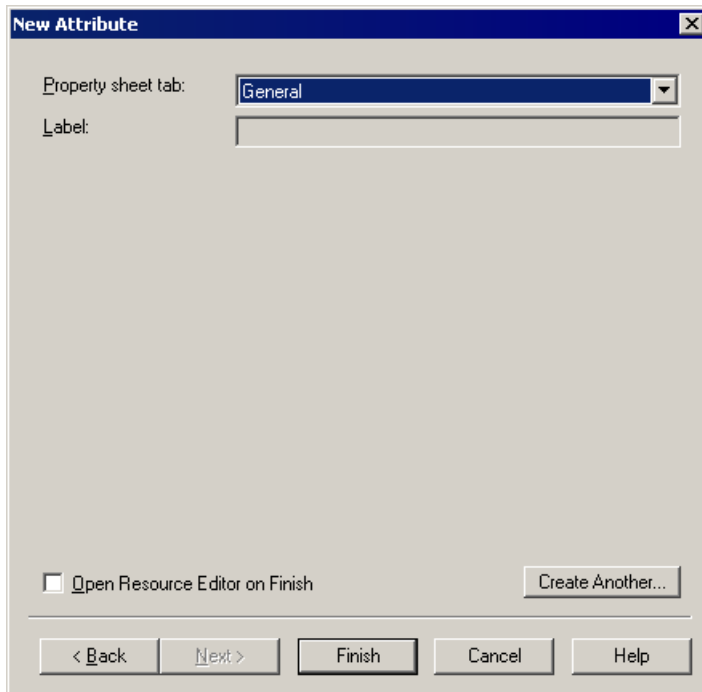
1. Open the property sheet of the object you want to extend, click the menu button, and select **New Attribute** to open the New Attribute dialog:



The image shows a 'New Attribute' dialog box with the following fields and controls:

- Name:** A text field containing 'Login'.
- Comment:** A large text area.
- Data type:** A dropdown menu showing '(Text)'.
- Default value:** A text field with a dropdown arrow and an ellipsis button.
- List of values:** A text field with an ellipsis button and a 'Complete' checkbox.
- Text Format:** A dropdown menu showing 'Text'.
- ☐ **Open Resource Editor on Finish**
- Create Another...** button
- Navigation buttons at the bottom: **< Back**, **Next >**, **Finish**, **Cancel**, and **Help**.

2. Enter a **Name** and **Datatype** for the new attribute and complete any other appropriate fields.
3. [optional] Click **Next** to specify the property sheet tab on which you want the attribute to appear. If you choose to create a new property sheet tab, you must enter a tab label to display.



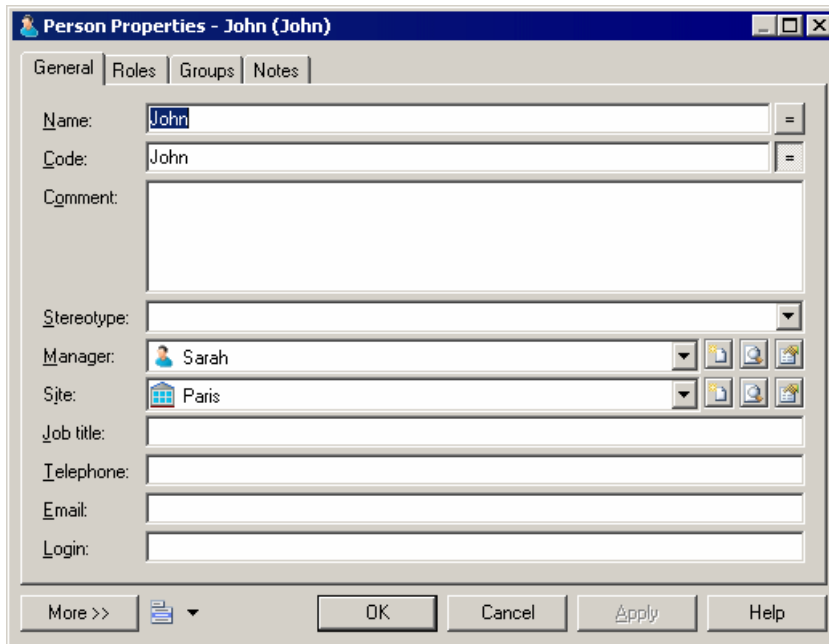
By default, the attribute is inserted on the tab from which you launched the New Attribute dialog, if the tab is editable.

4. [optional] If you want to view the new attribute in the PowerDesigner Resource Editor, select the **Open Resource Editor on Finish** checkbox.

For information about working with the Resource Editor, see *Customizing and Extending PowerDesigner > PowerDesigner Resource Files*

5. Click **Finish** to close the dialog and create the new attribute.

The attribute appears on the specified property sheet tab:



### Adding a New Collection to an Object

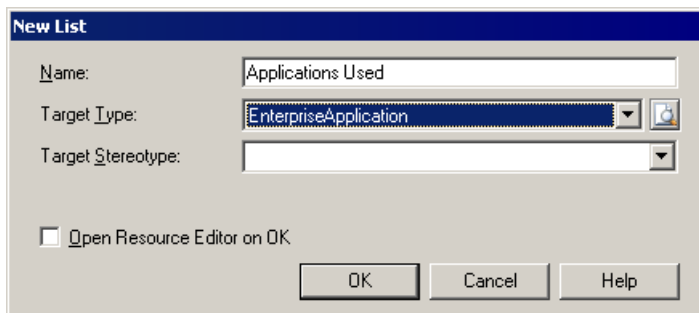
The PowerDesigner metamodel specifies the collections of related objects available by default for an object (for example table columns or class attributes). To quickly extend the metamodel and add a new collection from an object property sheet, click the menu button, and select **New List of Associated Objects**. The new collection is immediately available on all objects of this type.

---

**Note:** The definition of the new collection is stored in a PowerDesigner extension file. For detailed information about working with these files, see *Customizing and Extending PowerDesigner > Extension Files*.

---

1. Open the property sheet of the object you want to extend, click the menu button, and select **New List of Associated Objects**.



- For information about working with the Resource Editor, see *Customizing and Extending PowerDesigner > PowerDesigner Resource Files*

- The list appears as a new tab in your property sheet, containing tools that let you associate existing and new objects of the specified type with your object:



---

**Note:** The definition of the customized tab is stored in a PowerDesigner extension file. For detailed information about working with these files, see *Customizing and Extending PowerDesigner > Extension Files*.

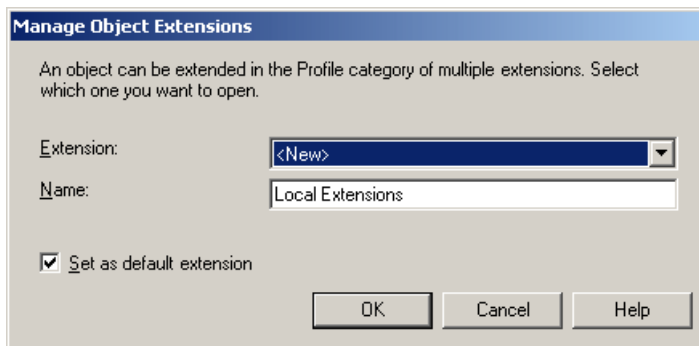
1. Open the property sheet of the object whose property sheet you want to customize, select the tab to change, click the menu button, and select **Customize this Tab**.
2. [optional] Modify the **Name** that will be displayed as the tab name.
3. Use the **Add Attribute** and **Add Collection** tools in the Form tab toolbar to add new properties to your form. You can reorder controls in the form control tree by dragging and dropping them.  
For detailed information about these and other form tools and properties click the **Help** button, or see *Customizing and Extending PowerDesigner > Extension Files > Forms (Profile)*.
4. Click **OK** to close the dialog and return to the modified property sheet.

### **Managing Extensions**

To review your object extensions in the Resource Editor, select **Manage Object Extensions** from the property sheet menu.

You can create basic new properties and lists using the wizards available from the property sheet menu. To perform more advanced editing of extensions, you must open the appropriate extension.

1. Open the property sheet of the object, click the menu button, and select **Manage Object Extensions**.



2. Select the **Extension** file that you want to open from the list of files attached to the model, or select <New> to create a new embedded extension file.
3. [optional] Select the checkbox to set the chosen extension file as the default. The default extension file is used to contain the extensions created from the property sheet menu
4. Click **OK** to open the chosen extension in the Resource Editor.

For detailed information about editing these files, see *Customizing and Extending PowerDesigner > Extension Files*.

### **Customizing the Generation of Files for an Object**

In PowerDesigner, you can define a generated file on a selected metaclass (or stereotype or criterion), in this case a file is generated for each instance of the metaclass existing in your model.

The generated files mechanism is defined in *Customizing and Extending PowerDesigner > Extension Files > Generated Files (Profile)*.

You can modify the default generation of files using artifacts. Artifacts are used to generate files only for selected instances of a metaclass in order to:

- Design a source file that includes the code of several objects in a single file.
- Generate only for selected instances of a metaclass.
- Customize the generated file name and path.

#### ***C# and VB .NET Reverse Engineering Use Case***

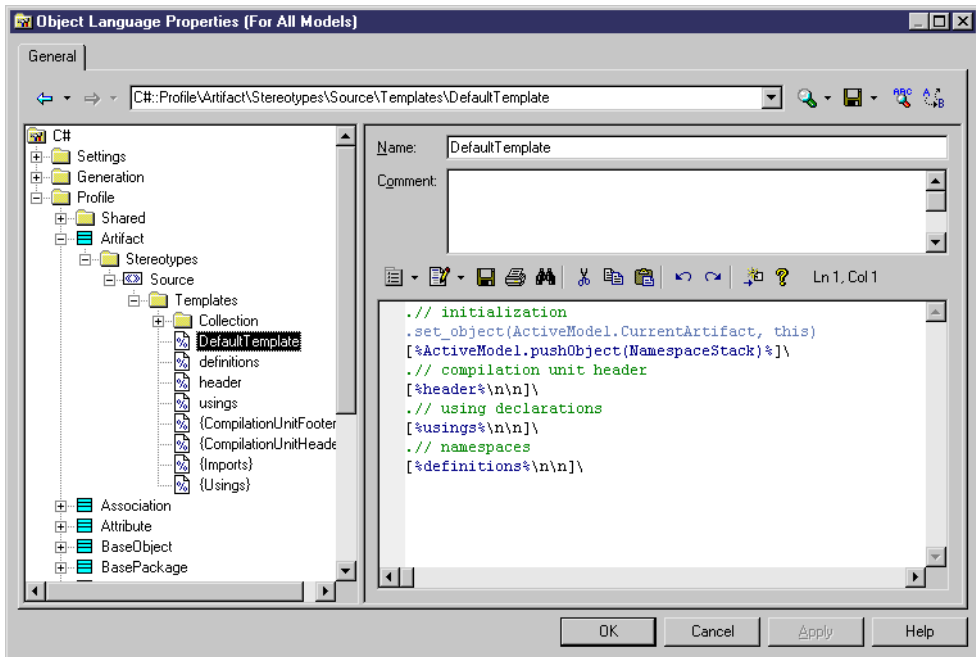
Artifacts are visible in the C# and VB .NET object languages. This is to support round-trip engineering for these languages: when you reverse engineer C# or VB .NET code, each source file in the source code becomes an artifact in PowerDesigner. The artifact allows you to re-generate the same collection of objects while preserving file structure.

### **Using Artifacts in a Model**

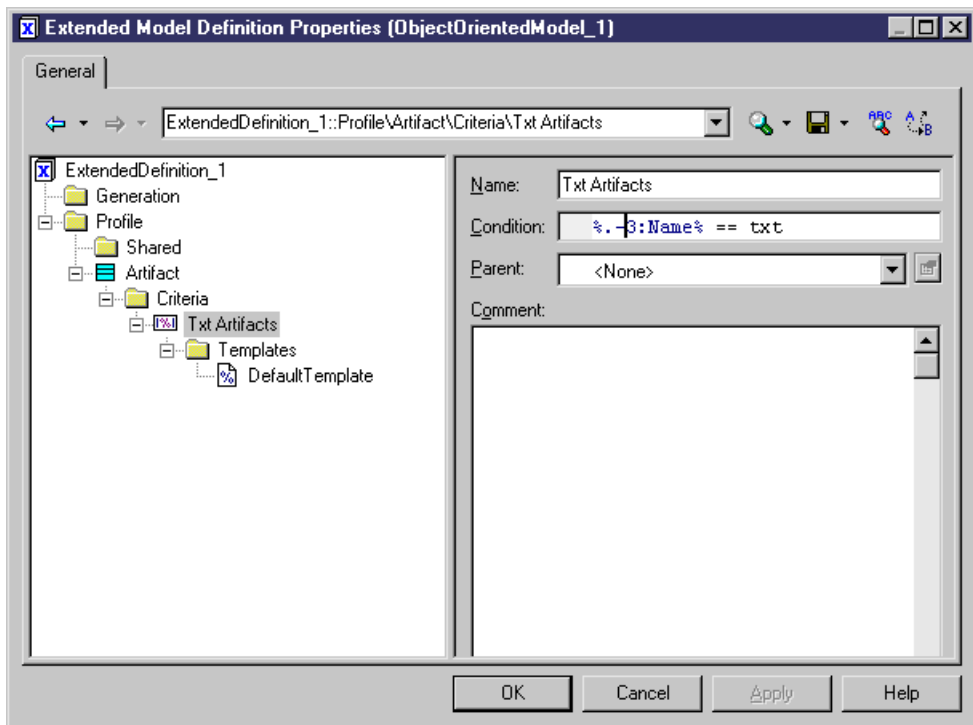
To be able to use an artifact in a model, you have to declare it in a resource file attached to your model. You must create a template called "DefaultTemplate" under an artifact stereotype or criterion bearing the name of the corresponding file type to generate.

In the C# resource file, if you expand the Artifact folder, you can see that the stereotype "Source" and the template "DefaultTemplate" are defined by default. This means that when you create a new artifact and assign the Source stereotype, this artifact inherits the default template defined below:



*Example*

You define the following artifact criterion in an extension:

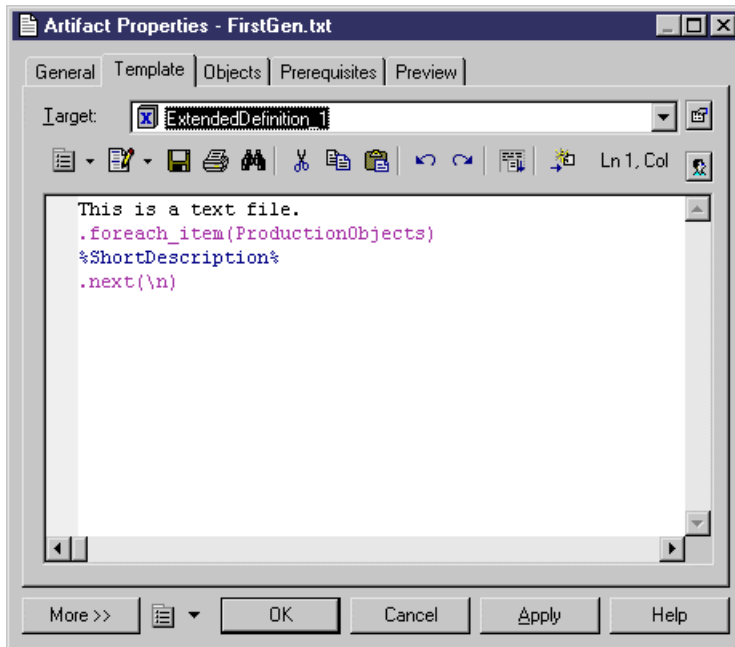


This criterion verifies that the last 4 characters of the artifact name are .TXT. You also need to create the default template in order to define the content of the generated file. In this example, DefaultTemplate is defined as follows:

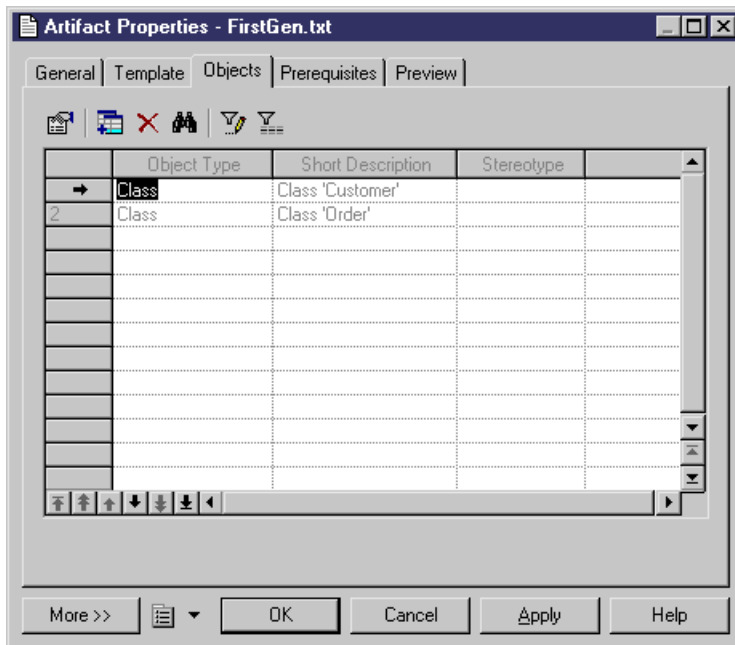
```
This is a text file.
```

```
.foreach_item(ProductionObjects)
%ShortDescription%
.next(\n)
```

You can now create artifacts in the model using the **New > Artifact** command in the model contextual menu. If you create an artifact with the .TXT extension and select the correct target in the Template tab of the artifact property sheet, the default template is automatically assigned to this artifact. This means that the short description of each instance of object associated with the current artifact will be written in the generated file:



You can now define instances of objects you want to include in the file generated from the current artifact:



**Defining an Artifact**

Artifacts can replace the standard generation of files; by default, an artifact generates the same code as the generated file but only for selected instances of a metaclass.

An artifact has the following properties:

Property	Description
Name	Name of the artifact.
Comment	Descriptive comment for the artifact.
Stereotype	Sub-classification used to extend the semantics of an object without changing its structure; it can be predefined or user-defined.
Encoding	Allows you to modify the default file encoding of the files to reverse engineer.

An artifact definition also includes the following properties:

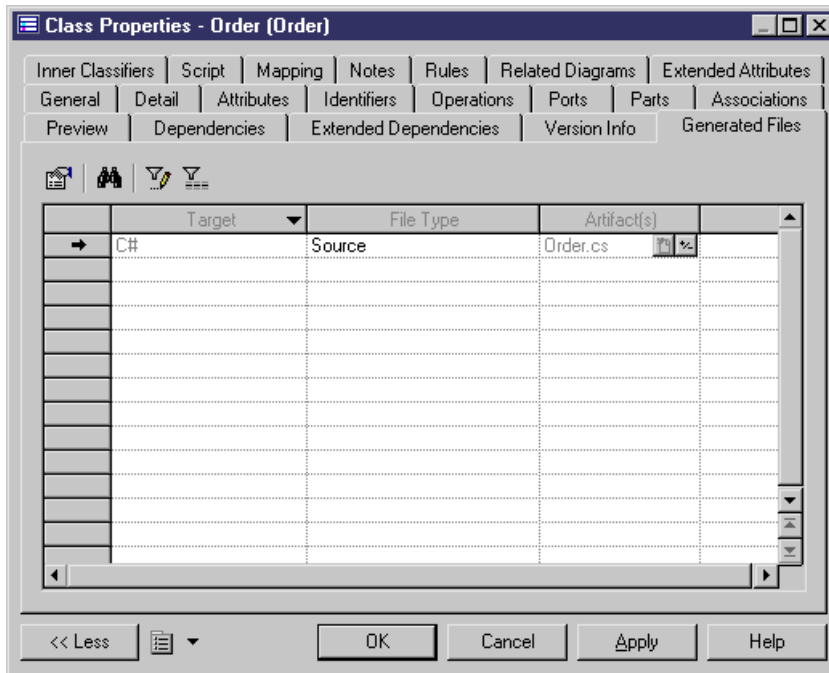
Property	Description
Template	Template used to generate the content of the generated file.
Objects	List of objects associated with the current artifact.
Prerequisites	List of artifacts that must be generated before the current artifact.
Preview	Allows to visualize the generated code of the artifact.

1. Double-click the symbol of an object with generated files, for example a class in C# language.
2. Click the Generated Files tab.

The Target column displays the resource file where the generated file is defined and the File Type column displays the type of the generated file.

Each row in the list corresponds to a generated file type available for the current instance of a metaclass, you can customize the generation of this file using an artifact.

3. Click the Create tool in the Artifact(s) column to add an artifact. This artifact will replace the standard file generation for the current object.

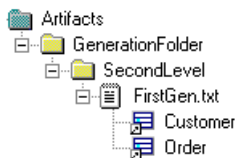


4. Click Apply and click the Properties tool to define artifact properties.
5. Click OK in both property sheets.

## Managing Artifacts

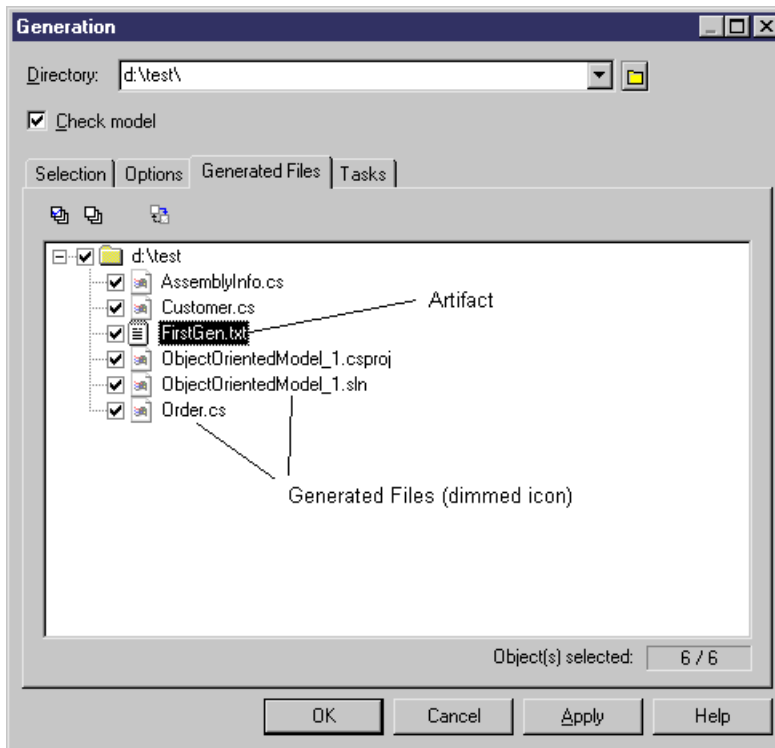
Artifacts appear in the Artifact category of the Browser. You can perform the following actions to customize an artifact. You can drag and drop authorized objects from the diagram or the Browser onto an artifact in order to add the code of this instance to the artifact.

You can use folders to create an artifact hierarchy for generation by right-clicking the Artifact category or a sub-folder and selecting **New > Artifact Folder**. You can create as many folder levels as necessary and create or place artifacts at any level.



### Generated Files Tab

In the Generation dialog box, the Generated Files tab displays a checkbox tree with generated files (with a dimmed icon) and artifacts. You can select or deselect the files you want to generate.

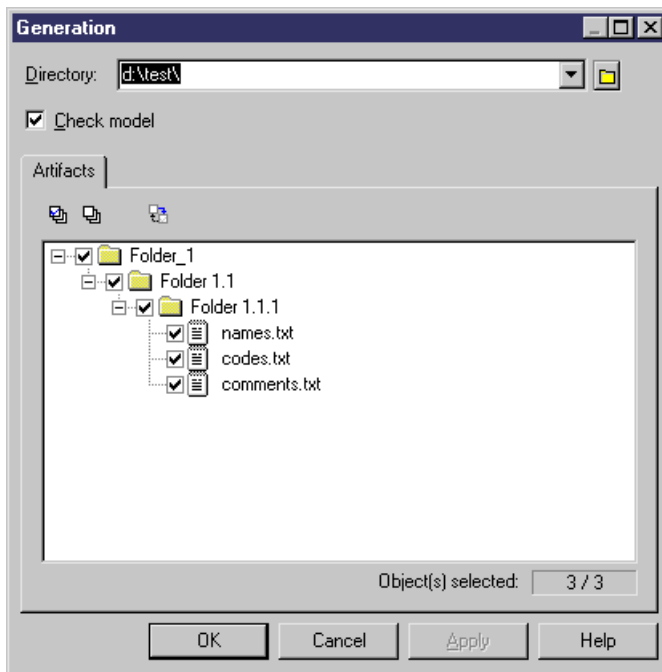


You can modify generation options from this dialog box, and you can also check artifact generation completeness: if an exclamation mark is displayed on the artifact icon it means that one or several prerequisite artifacts are missing.

If you click the Enforce Dependencies tool in the upper part of the dialog box, the artifacts that are prerequisites of other artifacts are automatically selected in the tree view in order to properly generate artifacts.

#### *Generate from an Artifact Folder*

If you click the Generate command in the artifact folder contextual menu, a Generation dialog box is displayed to let you manage the generation of a given artifact folder. This dialog box also displays a checkbox tree with children artifacts of the selected artifact folder.



You can enforce dependencies in the Generation dialog box to make sure all prerequisites are selected for generation.

## Applying Transformations to Objects

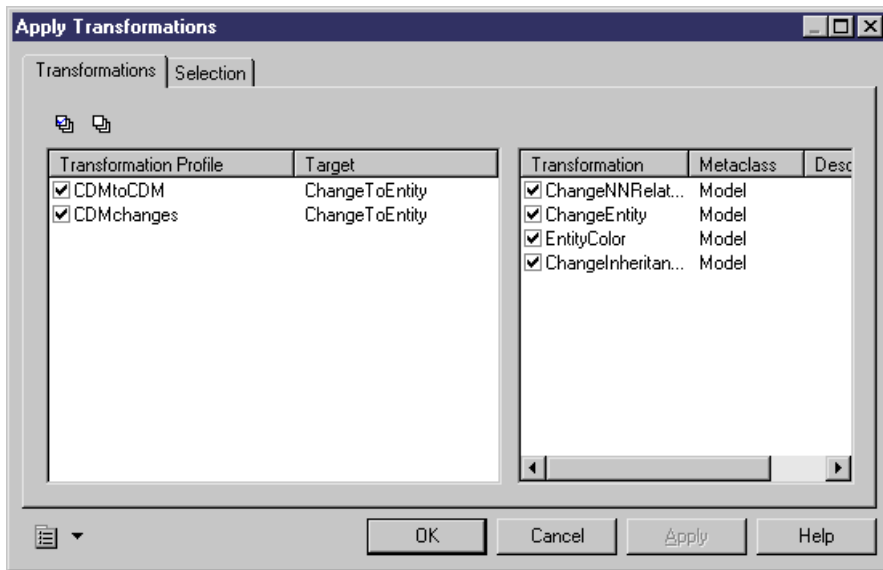
Transformations are used to perform generic modifications to your model objects. You can apply transformations to your model as a sort of design pattern. You can design a pattern using the transformation feature and *play* it in your model in order to modify objects. For example, in an OOM, you could use a transformation to convert all analysis classes with the <<control>> stereotype into components in order to add an implementation layer to your model.

In order to apply transformations, you must have either defined transformation profiles in your model's language definition file (for PDM, OOM, BPM, or XSM) or in an extension file (see *Customizing and Extending PowerDesigner > Extension Files > Transformations (Profile)*).

**Note:** Pre- and post-generation transformations can be applied during model-to-model generation (see *Applying Pre- and Post- Generation Transformations* on page 442). You can only invoke post-generation transformations outside of a generation.

1. Select **Tools > Apply Transformations**.

2. Select the profiles and transformations to be applied. If you deselect a profile, none of its transformations will be executed. You can drag and drop profiles to modify the order of execution of transformations.



3. [optional] Click the **Selection** tab and deselect any objects that you want to exclude from the transformation.
4. Click **OK** to apply the transformations.

The object tree of the model is traversed from the model object down and, for each type of object for which one or more post-generation transformation profiles is defined, each profile is applied in the order in which they appear on the tab, with each transformation being applied in the order in which they are defined in the profile.

## Exporting Objects to Troux Semantics

The Troux Upload extension files provide a framework for mapping PowerDesigner metadata to Troux Semantics domains. An extension file with the export mechanism is provided for each type of PowerDesigner model along with instructions for how you can define mappings to export your model objects in the Troux Upload XML format. Example mappings are provided to map certain EAM objects to the Troux Application and Software domains

The extension files (along with developer and user documentation) are installed at `PD_install_dir\Resource Files\Extended Model Definitions\Troux`, and should be copied into the parent `Extended Model Definitions` directory in order to be developed and used.



# Diagrams, Matrices, and Symbols

Most PowerDesigner models contain diagrams, in which your model objects are represented by symbols. You can add a dependency matrix to any model to show relationships between objects.

## Diagrams

---

A diagram is a graphical view of a model or a package. All models and packages have at least one diagram, and you can add additional diagrams as necessary. Objects can appear in multiple diagrams, and their symbols can show different kinds of information in each diagram.

For example, in a Publishing model, different diagrams could define the different activities involved in this industry: the printing diagram, the sales diagram, the accounting diagram, the book selection committee diagram.

When you save the model you also save all the diagrams it contains. You cannot save a diagram separately.

---

**Note:** In requirements models (see *Requirements Modeling*), there are no diagrams, but rather views.

---

## Creating a Diagram or a Diagram from a Selection

---

By default, any model or package opens with a default diagram. You can create as many diagrams as you want in a model or in a package. You can also select two or more symbols in an existing diagram and create a new diagram from your selection.

You can create a diagram in any of the following ways:

- Select **View > Diagram > New Diagram > *Diagram type***. If you have previously selected any object symbols, then the selected symbols will be copied into the new diagram. Alternatively, if you have selected two or more symbols in a diagram, you can right-click a selected symbol and choose **Create Diagram from Selection**.

---

**Note:** Since PowerDesigner objects can appear in multiple diagrams, the selected objects are not duplicated in the Browser, but they are now present in both the original and the new diagram.

---

- Right-click the background of your diagram and select **Diagram > New Diagram > *Diagram type***.

- Right-click the model node in the Browser and select **New > Diagram type**.

In each case you will be invited to specify a name, code, and optional comment for the new diagram.

### Diagram Properties

You can modify an object's properties from its property sheet. To open a diagram property sheet, right-click its Browser entry and select Properties from the contextual menu, or right click the diagram background and select **Diagram > Properties** from the contextual menu.

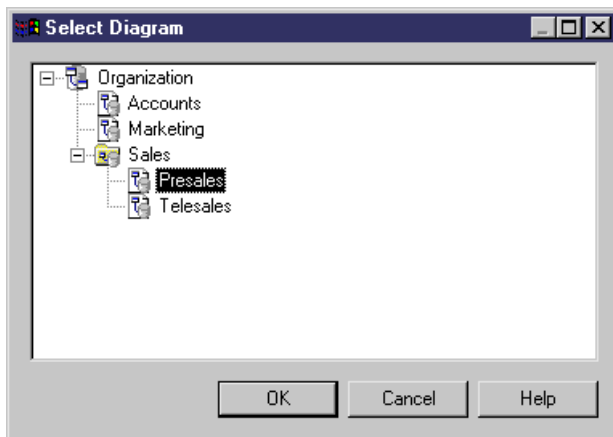
The **General** tab contains the following properties:

Property	Description
Name	Specifies the name of the item which should be clear and meaningful, and should convey the item's purpose to non-technical users
Code	Specifies the technical name of the item used for generating code or scripts, which may be abbreviated, and should not generally include spaces
Comment	Additional information concerning the diagram
Parent	Specifies the name of the parent model or package
Stereotype	Specifies a stereotype for the diagram. For example, a statechart diagram can serve to model page flows in JSF and other web frameworks.  You can use a profile to provide special processing for diagrams and other objects carrying stereotypes. For more information, see <i>Customizing and Extending PowerDesigner &gt; Extension Files</i> .
Page scale	Sets a default display for page scale. The page scale percentage lets you define a page size according to your modeling needs. If you have a lot of objects on several pages, you can reduce the page scale percentage in order for all the objects to fit on a single printable page
Default Diagram	Diagram by default. This check box is automatically selected if the diagram is the first created diagram

### Opening and Viewing Diagrams




You can open a diagram from the Browser or from the View menu, and move between open diagrams using the tabs above the canvas or by pressing **Ctrl+Tab** or **Ctrl+Shift+Tab**.

- Double-click the diagram entry in the Browser.
- Press **Ctrl +D**, or select **View > Diagram > Select Diagram** to open the Select Diagram dialog box, select a diagram node in the tree and click **OK**.



- To access diagrams beneath package or other composite object symbols:
  - Select the **Open Diagram** tool from the Toolbox and click the symbol.
  - Press **Ctrl** and double-click the symbol.
  - Right-click the symbol and select **Diagram > Open Diagram**.

The following diagram viewing tools are available in the Toolbox or from the **View** menu:

Tool	Description
	<p>Zoom In (<b>F6</b>) - Select the Zoom In tool and click anywhere in the diagram. The point clicked on is centered.</p> <p>Alternatively, you can select <b>View &gt; Zoom In</b>, or turn your mouse scroll wheel away from you while holding the <b>Ctrl</b> key.</p> <p>To zoom in to a particular area, select the Zoom In tool and click and drag a rectangle around the area to be displayed. When you release the mouse button, the diagram zooms to the selected area.</p>
	<p>Zoom Out (<b>F7</b>) - Select the Zoom Out tool and click anywhere in the diagram. The point clicked on is centered.</p> <p>Alternatively, you can select <b>View &gt; Zoom Out</b>, or turn your mouse scroll wheel towards you while holding the <b>Ctrl</b> key.</p>
	<p>View the whole diagram (<b>F8</b>) - Double-click the Global View tool or select <b>View &gt; Global View</b>.</p>
[none]	View actual size ( <b>F5</b> ) - Select <b>View &gt; Actual Size</b> .
[none]	View the current (printable) page ( <b>Ctrl+F10</b> ) - Select <b>View &gt; Page View &gt; Current Page</b> .
[none]	View all pages that contain symbols ( <b>F10</b> ) - Select <b>View &gt; Page View &gt; Used Pages</b> .

Tool	Description
[none]	View all pages in the diagram - Select <b>View &gt; Page View &gt; All Pages</b> .
[none]	Center on selected symbols - Select <b>View &gt; View Selection</b> .
[none]	Return to previous view ( <b>F9</b> ) - Select <b>View &gt; Previous View</b> .  This and the Next View option allows you to toggle back and forth between various selections and zooms you have used to navigate in your diagram, for example between a limited view and a global view of the diagram.
[none]	Go to next view ( <b>Shift+F9</b> ) - Select <b>View &gt; Next View</b> .
[none]	Refresh View ( <b>Shift+F5</b> ) - Select <b>View &gt; Redisplay</b> .

### **Finding an Object Symbol in the Diagram**

You can locate any object with a symbol in a diagram or among several diagrams using Find in Diagram (or, for an RQM, Find in Document View). Objects without graphical symbol such as domains cannot be found in the diagram.

If the object has only one symbol, the appropriate diagram is opened with the object symbol centered. If the object has several symbols, a dialog box opens to allow you to select one.

This feature can be very useful if you are looking for the target object of shortcut symbols, as you can access the target object from the shortcut property sheet and then locate the target object in the diagram.





Find in Diagram (or Find in Document View) is available from:

- The Browser — Right-click an object in the Browser and select Find in Diagram (or Find in Document View) from the contextual menu.
- The Result List — Right-click an object in the Result List and select Find in Diagram (or Find in Document View) from the contextual menu.
- The object property sheet dropdown menu — Open an object property sheet and select Find in Diagram (or Find in Document View) from the dropdown menu at the bottom-left corner.
- An objects list — From an objects list, select an object in the list and click the Find Symbol in Diagram tool in the list toolbar.

### **Specifying Diagrams as Related Diagrams**

*Related Diagrams* are diagrams that provide additional information about an object. You can use related diagrams to further define the behavior and implementation of objects and to view them from different angles and in terms of semantic relationships. You can associate any type of diagram open in the workspace with an object, including diagrams from other packages or models, by opening the property sheet of the object and clicking the **Related Diagrams** tab.

The following tools are available to attach new related diagrams or work with existing ones:

Tool	Description
	<b>Properties</b> - Opens the property sheet of the selected diagram.
	<b>Open Diagram</b> - Opens the selected diagram.
	<b>Add Objects</b> - Opens an object selection dialog to select diagrams and add them to the list (see <i>Adding an Item from a Selection List</i> on page 118).
	<b>Create an Object</b> - Creates a new diagram, which will be added to the list as a related diagram. You must specify the location (model) and type of diagram to create and give it an appropriate name.

---

**Note:** You can navigate to a related diagram from an object symbol by right-clicking the symbol and selecting **Related Diagram > Diagram Name**. To create a new diagram and associate it to the object as a related diagram, right-click the symbol and select **Related Diagram > New**.

You can only attach related diagrams to objects that have a **Related Diagrams** tab in their property sheet.

---

## Deleting a Diagram

When you delete a diagram, you delete a view of a model or a package. This action does not affect the objects in the model or package.

You can delete a diagram in any of the following ways:

- Select the diagram node in the Browser and press the **Del** key.
- Right-click the diagram window background and select **Diagram > Delete** from the contextual menu.
- Select **View > Diagram > Delete**.

## Printing Diagrams

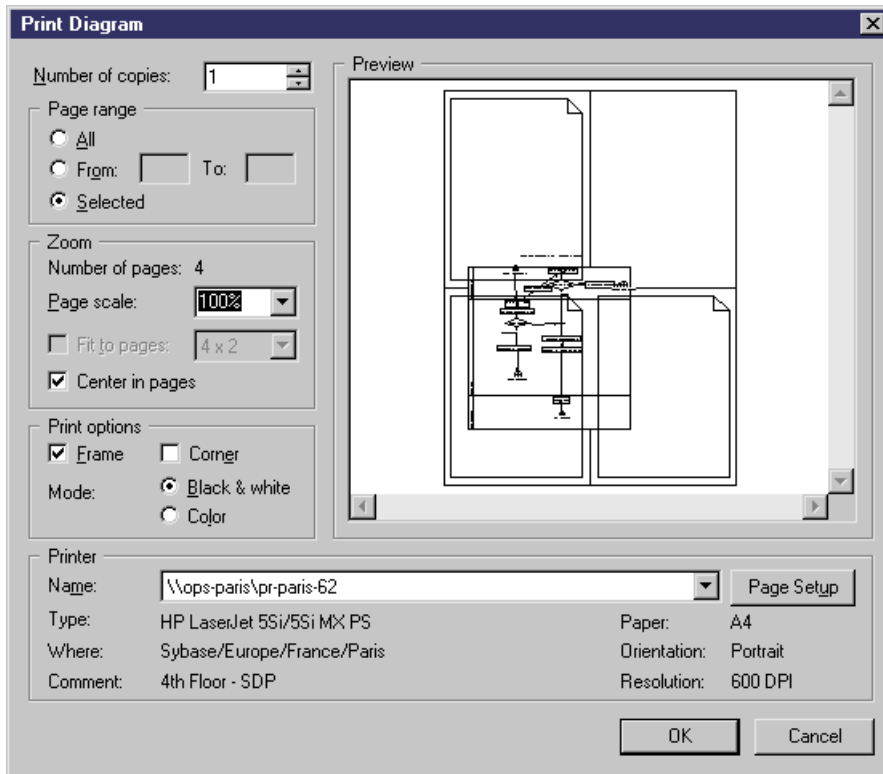
You can print the currently selected diagram at any time. You can print the whole diagram, a selection of pages, or a selection of objects.

---

**Note:** To print detailed information about model objects, create a model report (see *Chapter 12, Reports* on page 363).

---

1. [optional] Select symbols in the diagram in order to print them and exclude the others.
2. Select **File > Print**, or click the **Print** tool to open the Print Diagram dialog, which displays default print options and the number of printed pages needed for the diagram.



3. [optional] Specify the pages to print in the Page range groupbox or by clicking in the Preview pane (see *Print Diagram Options* on page 174). Only pages with an overlaid page frame will be printed.
4. [optional] Specify a page scale or set of pages to fit to (see *Print Diagram Options* on page 174). By default, diagrams are printed at 100% scale on as many pages as necessary.
5. [optional] Click the Page Setup button to open the Page Setup dialog and specify your page layout (see *Page Setup Options* on page 175).
6. Click **OK** to start printing.

### **Print Diagram Options**

You can preview the selection to be printed and specify various options in the Print diagram dialog box.

Option	Description
Number of copies	Specifies the number of copies to print.

Option	Description
Page range	Specifies which pages to print. You can choose between: <ul style="list-style-type: none"> <li>• All - Prints all the pages of the diagram.</li> <li>• From / To - Prints a range of pages covered by the diagram. The corresponding pages are framed in the Preview window.</li> <li>• Selected - Prints the pages you select in the Preview window.</li> </ul>
Number of pages	Displays the number of pages required based on your zoom options.
Page scale	Specifies the scale at which the diagram will be printed.
Fit to pages	Reduces the scale of the diagram to print it on the number of pages specified, for example 1x3. The <b>Number of pages</b> option is updated and the <b>Center in pages</b> option is unavailable. To apply these changes to your diagram, select <b>Symbol &gt; Fit to Page File</b> and <b>File &gt; Page Setup</b> for paper orientation.
Center in pages	Centers the diagram in the pages that it covers. The <b>Fit to pages</b> option is unavailable.
Frame	Draws a solid line border around the image on all pages.
Corner	Specifies the printing of <i>crop marks</i> in each corner to help align multiple pages.
Mode	Specifies whether the diagram will be printed in Black & White or Color.
Printer	Select a printer from the Name list. Click the <b>Page Setup</b> button to modify printer parameters.

### **Page Setup Options**

The Page Setup dialog allows you to modify standard printer parameters, such as Paper, Orientation and Margins, and to add various kinds of information to the Header, Footer and Page of your printed diagram.

You can arrive at the Page Setup dialog by selecting **File > Page Setup**, or by clicking the **Page Setup** button in the Print Diagram dialog (see *Printing Diagrams* on page 173).

The following fields let you specify the content of the header and footer:

Option	Description
Header	<p>Specifies the content of the page header. You can insert fixed text and use the arrow button to the right of the field to insert one or more of the following variables:</p> <ul style="list-style-type: none"> <li>• Current Date - inserts the date</li> <li>• Current Time - inserts the time</li> <li>• Current Page - inserts the content of the <b>Page</b> field</li> <li>• Last Page - inserts the number of the last page</li> <li>• Diagram - inserts the diagram name</li> <li>• Location - inserts the file path</li> <li>• Model - inserts the model name</li> <li>• Package - inserts the package name</li> <li>• Module - inserts the model type</li> <li>• Application Name - inserts "PowerDesigner"</li> </ul>
Footer	<p>Specifies the content of the page footer. You can insert fixed text and use the arrow button to the right of the field to insert the same variables as for the page header.</p>
Page	<p>Specifies the page number format to use in the header and footer. You can insert fixed text and use the arrow button to the right of the field to insert one or more of the following variables:</p> <ul style="list-style-type: none"> <li>• Page Row - inserts the diagram pagination grid row number. This can be useful to help assemble large diagrams printed on multiple pages. You may need to zoom out to see the diagram pagination grid:</li> </ul> <div data-bbox="422 986 884 1425" data-label="Diagram"> </div> <ul style="list-style-type: none"> <li>• Page Column - inserts the diagram pagination grid column number</li> <li>• Page Number - inserts the standard page number</li> </ul>



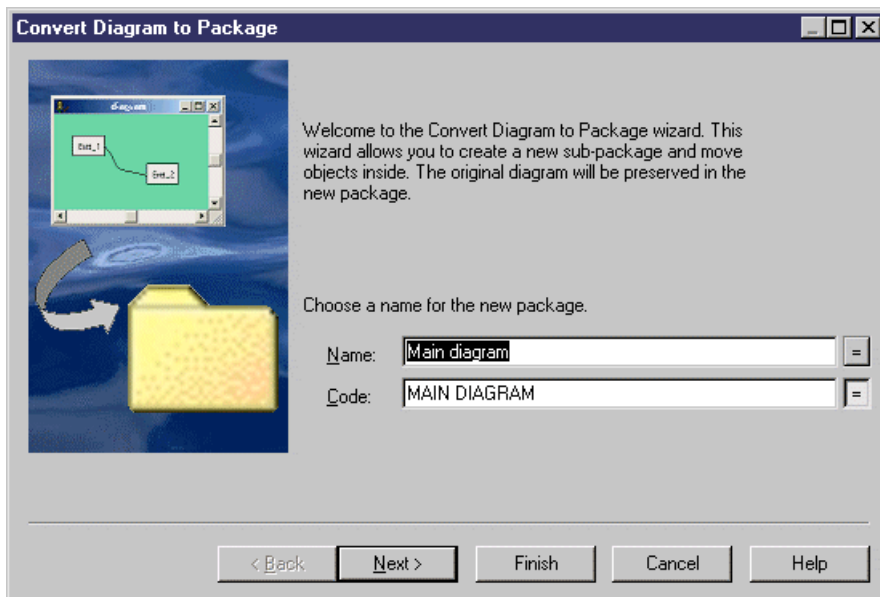
## Converting a Diagram to a Package

PowerDesigner lets you convert a diagram to a package. You can move all the objects in the diagram to the new package or specify only certain objects. Other objects will stay in their original package and be represented via shortcuts in the new package.

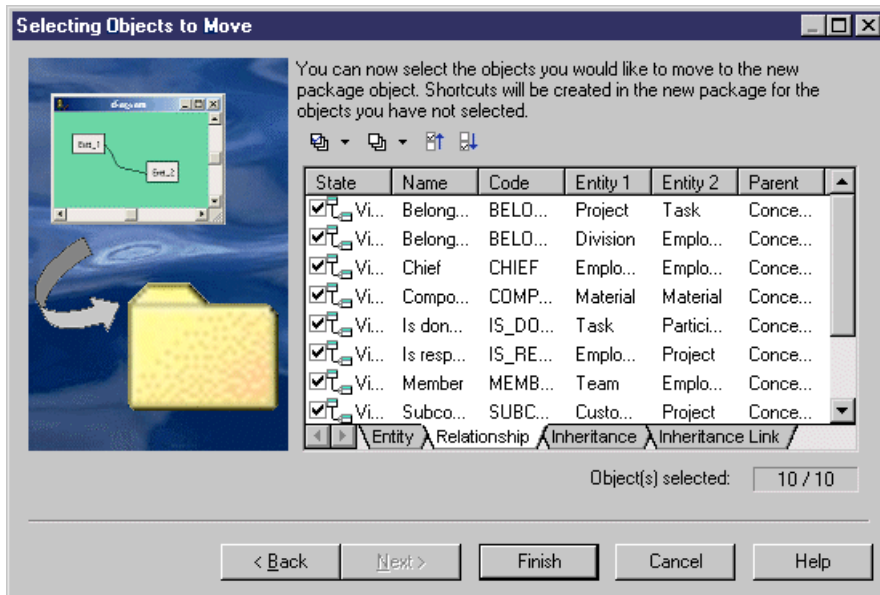
The linking objects that you move keep their links in the target package and a shortcut is usually created in the source package. The general rule being that conceptual modeling must be preserved.

Shortcuts creation rules in PowerDesigner also apply to moving objects between packages (see *Chapter 15, Shortcuts and Replicas* on page 455).

1. Select **View > Diagram > Convert to Package** (or right-click the diagram background window and select **Diagram > Convert to Package** or right-click the diagram node in the Browser and select **Convert to Package**) to open the Convert Diagram to Package wizard. By default the package takes the name of the diagram.



2. Click **Next** to open the Selecting Objects to Move page, which lists all the objects in the diagram available to move to the new package. Objects are organized by object type, with a sub-tab for each object type. By default, all the objects are selected.



3. [optional] Deselect any objects you do not want to move to the new package. Objects deselected here will remain in the original package and be represented in the new package via shortcuts.
4. Click **Finish** to create the new package and move the selected objects to it.

The new package and diagram are added in the Browser.

## Moving a Diagram to a Package

In some cases, you may want to move a diagram and some or all of the objects it contains into another package or composite object, such as a process or activity.

The linking objects that you move with the diagram keep their links in the target package and a shortcut is usually created in the source package. The general rule being that the design of the original diagram must be preserved.

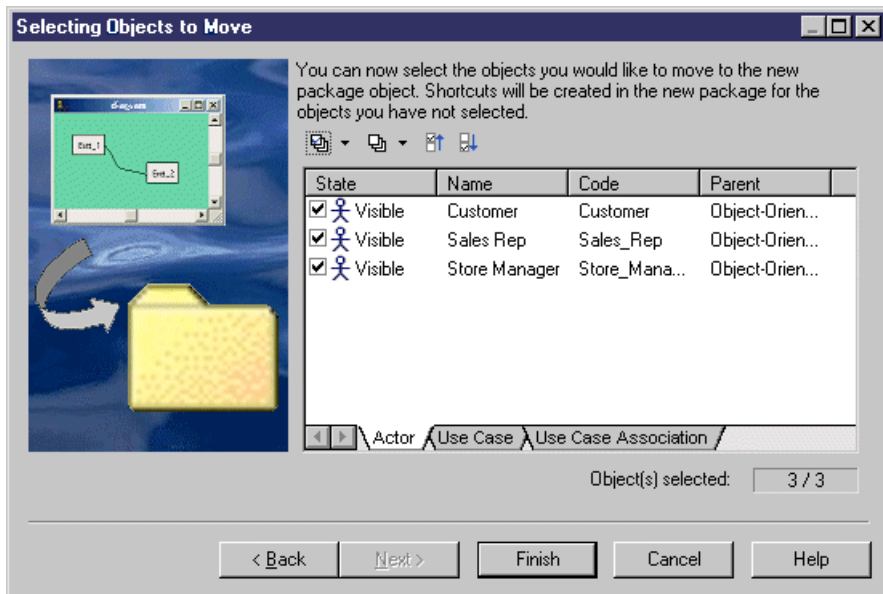
Shortcuts creation rules in PowerDesigner also apply to moving objects between packages (see *Chapter 15, Shortcuts and Replicas* on page 455).

You can simply drag and drop the diagram from one package to another in the Browser to move all the objects in the diagram to the target package. To control which objects are moved, use the wizard.

1. Select **View > Diagram > Move to Package** (or right-click the diagram background window and select **Diagram > Move to Package** or right-click the diagram node in the Browser and select **Move to Package**) to open the Move Diagram to Package wizard.



2. Select the target package to which you want to move the current diagram and click **Next** to open the Selecting Objects to Move page, which lists all the objects in the diagram available to move to the new package. Objects are organized by object type, with a sub-tab for each object type. By default, all the objects are selected.



3. [optional] Deselect any objects you do not want to move to the new package. Objects deselected here will remain in the original package and be represented in the new package via shortcuts.
4. Click **Finish** to move the diagram to the new package.

If the last diagram is moved or deleted from a package, a new diagram is automatically created as all packages must contain at least one diagram.

## Moving Entities Between Packages in a CDM

In a CDM, when moving entities containing data items from one package to another, different rules apply depending on where the data items are used.

Data items	Namespace	Move result
Only used by selected entity	Move within the same namespace	The data items are moved with the entity.
Reused among different entities	Move within the same namespace	Shortcuts of data items are created for reused data items.
Used only by one entity or reused among different entities	Change namespace	The data items are copied in the other namespace.

## Dependency Matrices

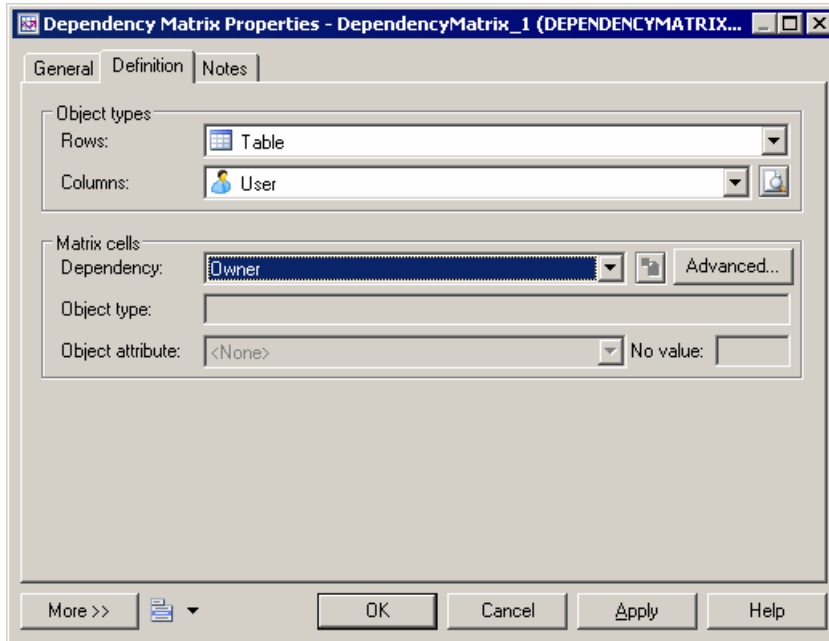
You can create dependency matrices to review and create links between any kind of objects. You can create an individual matrix from the Browser or define a matrix in a resource file for reuse.

In the following enterprise architecture model (EAM) example, systems are listed along the top of the matrix, and linked to the sites where they are in use, via traceability links:

		Backup	Backup		Finance	Finance			Production
			Live	Offline		Payroll	Purchasing	Sales	
Europe									
Europe	France								
	Lyons			✓					✓
	France		✓				✓	✓	
	Marseilles								
	Paris					✓			
	Spain								
	Barcelona							✓	
US	Bilbao		✓				✓		
	Madrid			✓		✓			
US									
US	Chicago					✓			
	New York		✓				✓		
	San Francisco			✓				✓	✓

1. Right-click a model or package node in the Browser and select **New > Dependency Matrix** to open the matrix property sheet to the **Definition** tab.
2. Select an object type from the current model to populate your matrix rows and an object type from the current or another model type to populate the columns.
3. Specify how the rows and columns of your matrix will be associated by selecting a dependency from the list.

In the following example, PDM tables are associated to users by the Owner dependency:



Only direct dependencies are available from the list. To specify a more complex dependency, click the **Advanced** button to open the Dependency Path Definition dialog (see *Specifying Advanced Dependencies* on page 182).

4. For certain dependencies, the **Object type** on which the dependency is based will be displayed, and you can select an **Object attribute** to display in the matrix cells along with the **No value** symbol, which is displayed if that attribute is not set in any particular instance.
5. Click the **General** tab and enter a name for the matrix (for example Table Owners Matrix).
6. Click **OK** to complete the definition and open your matrix.

---

**Note:** For information about defining a dependency matrix in a resource file (such as a DBMS definition file, object language file or extension file) and for detailed information about its properties, see *Customizing and Extending PowerDesigner > Extension Files*.

---

## Specifying Advanced Dependencies

You can examine dependencies between two types of objects that are not directly associated with each other, using the Dependency Path Definition dialog, which is accessible by clicking the Advanced button on the Definition tab, and which allows you to specify a path passing through as many intermediate linking objects as necessary.

Each line in this dialog represents one step in a dependency path:

Property	Description
Name	Specifies a name for the dependency path. By default, this field is populated with the origin and destination object types.
Dependency	Specifies the dependency for this step in the path. The list is populated with all the possible dependencies for the previous object type.
Object Type	Specifies the specific object type that is linked to the previous object type by the selected dependency. This field is autopopulated if only one object type is available through the selected dependency.

In the following example, a path is identified between business functions and roles, by passing from the business function through the processes it contains, to the role linked to it by a role association:

**Dependency Path Definition**

Name: Business Function / Role

Dependency path:  
Create as many rows as necessary in the list below to provide a path through the metamodel from 'Business Function' to 'Role':

Dependency	Object Type
Processes	Process
Role Associations	Role

Reset OK Cancel Help

## Working with Dependency Matrices

The dependency matrix displays the connections between the objects of the types specified in your definition. You can add and delete connections in the matrix as well as filter the rows and columns displayed and print or export the matrix.













In the following example, the same hierarchy of business processes is shown in the row and column headers in order to analyze the dependencies between them:

		Communication		Direct Sales			Indirect Sales			Manufacturing							
		Direct Sales		Register Order	Send to Manufacturing	Validate Order	Indirect Sales			Contact Partner	Organize Event	Manufacturing	Manufacture	Material Control	Quality Assurance	Shipping	Planning
Communication					✓				✓	✓						✓	✓
Direct Sales																	
Direct Sales	Register Order														✓		
	Send to Manufacturing				✓												
	Validate Order		✓						✓				✓				
Indirect Sales																	
Indirect Sales	Contact Partner																
	Organize Event					✓											
Manufacturing																✓	
Manufacturing	Manufacture																
	Material Control								✓								
	Quality Assurance												✓				
	Shipping									✓							
Planning					✓												

You can modify the links in the following ways:

- To add a link, click in the appropriate cell, and then click the **Create link** button at the bottom of the matrix (or press the **Spacebar** or **V**).
- To delete a link, click in a cell containing a link, and then click the **Delete link** button at the bottom of the matrix (or press the **Spacebar** or **Del**).
- To select all the cells in a row or column, click the appropriate header. To select multiple cells, rows, or columns, use the Ctrl key. To select ranges, use the Shift key or drag the cursor over the required area.

The following tools are available above the dependency matrix:

Tool	Description
	Properties – opens the property sheet of the object associated with the selected row, column, or cell.
	Copy – Copies the entire matrix for pasting into a CSV environment such as Excel or a plain text file.
	Select Rows/Columns (Ctrl + N) – Opens a selection box which allows you to select rows and columns to display in the matrix either by hand or by defining a filter (see <i>Adding an Item from a Selection List</i> on page 118).
	Display only Non-Empty Rows/Columns (Ctrl+R) – Filters the display to show only rows/columns that are populated.
	Display only Empty Rows (Ctrl+E) – Filters the display to show only empty rows.
	Vertical/Horizontal Column Header - Toggles between vertical and horizontal orientation of column headers.
	Shrink to Fit - Shrinks row and column headers to fit their contents.
	Show Parents in Row Header - Displays the hierarchy of objects that are ancestors to the row objects.
	Show Parents in Column Header - Displays the hierarchy of objects that are ancestors to the row objects.
	Show Packages in Headers - Displays the hierarchy of packages that contain the row and column objects.
	Refresh - Refreshes the display of dependencies in the matrix.
	Export to Excel - Exports the matrix as an MS Excel file. If the specified file already exists, you will be given the option to overwrite it or append a new worksheet in the file.

**Note:** You can modify the definition of the dependency matrix at any time by right-clicking its Browser node, selecting **Properties**, and clicking the **Definition** tab.


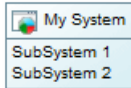
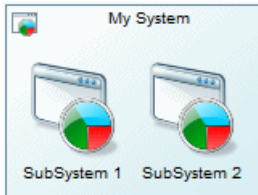
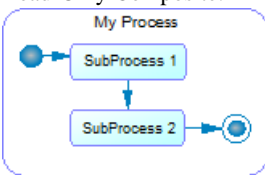


## Symbols

PowerDesigner gives you wide control over the formatting and arrangement of your object symbols.

- To change the format or content of a single symbol, right-click it and select **Format** (see *Symbol Format Properties* on page 193) Use the commands **Get Format** and **Apply Format** to copy the format of one symbol to another.
- To change the format or content of all the symbols in a diagram, select **Tools > Display Preferences** (see *Display Preferences* on page 206).
- To arrange and manipulate groups of symbols, use the **Symbol** menu (see *Aligning, Ordering, Grouping, and Hiding Symbols* on page 188).

The following symbol modes are available:

Mode	Details
<p>Icon:</p>  <p>My System</p>	<p>Most EAM and DMM objects support icon or picture symbols that display a name or other limited information beneath them. To switch between icon and detail mode, right-click the symbol and toggle the <b>Show Detail</b> command.</p> <p>To change any object symbol to an icon, select a <b>Custom Shape</b> of type Bitmap in the Symbol Format or Display Preferences dialog.</p>
<p>Detail:</p> 	<p>All objects support detail symbols (rectangles or other shapes) that can contain extensive information about the object inside the symbol, including lists of sub-objects. To control the information displayed, use the <b>Content</b> tab in the Symbol Format or Display Preferences dialog.</p>
<p>Editable Composite:</p> 	<p>Many EAM objects (and CDM and LDM entities using the Barker notation) support editable composite symbols that allow you to create or drag and drop sub-objects on the symbol.</p> <p>To switch between composite and detail mode, right-click the symbol and use the <b>Composite View</b> submenu.</p>
<p>Read-Only Composite:</p> 	<p>Decomposed BPM processes and OOM activities and packages in all types of models support read-only composite symbols that display the object's sub-diagram. To descend into the sub-diagram for editing, press <b>Ctrl</b> and double-click the symbol. To go back up to the parent diagram, press <b>Ctrl+U</b>.</p>

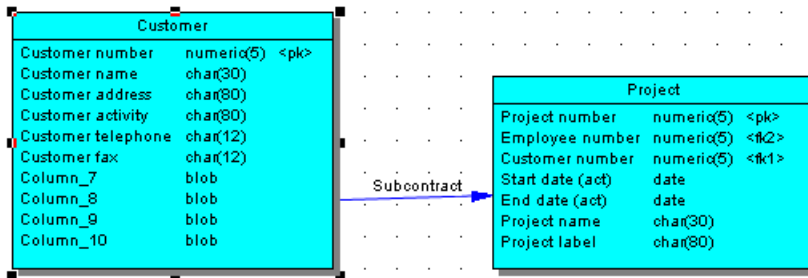
## Manipulating Symbols

You can select symbols in a PowerDesigner diagram using standard gestures. You can edit properties of the selected symbol's object or its sub-objects, and resize the symbol by clicking and dragging on its handles.

Click on a symbol with the default **Pointer** tool to select it. To select:

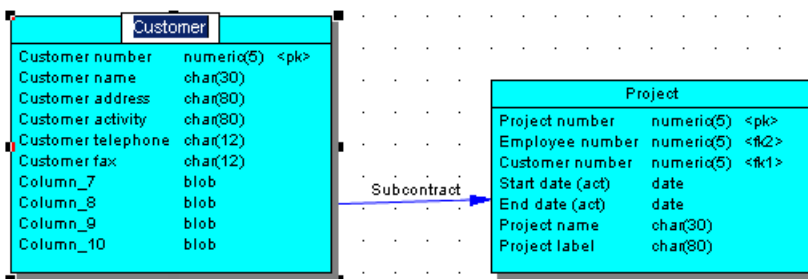
- Additional symbols, press and hold **Shift** while clicking them.
- All symbols in an area, click and hold while dragging the pointer over the area.
- All symbols connected to a symbol, click the symbol and then select **Edit > Select Connected Symbols**
- All symbols in the diagram, press **Ctrl+A**, click the Grabber tool, or select **Edit > Select All**

In the following example, the **Customer** table is selected, and can be moved by dragging or resized by dragging on one of its handles:



**Note:** To resize all the symbols in a diagram at once, click the **Grabber** tool and then drag one of the handles.

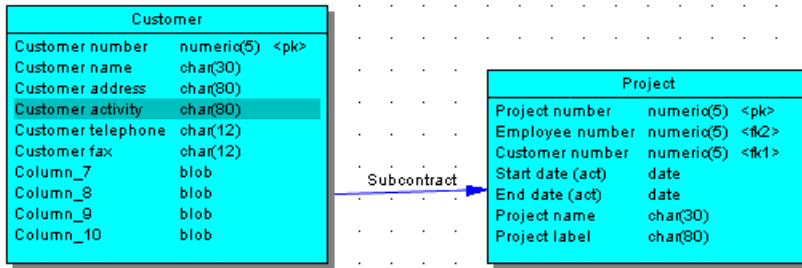
When a symbol is selected, clicking on one of its object properties lets you edit its value. Now, the table name is selected for editing:



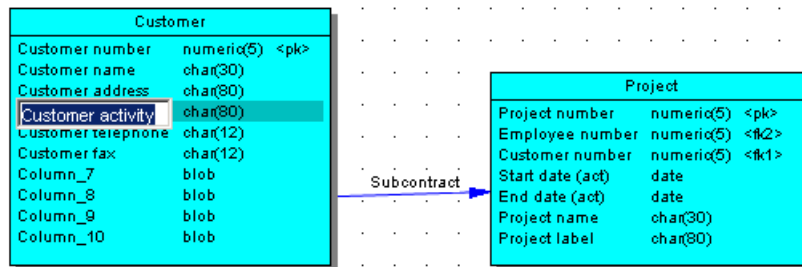
When an object property is selected for editing, you can navigate through its editable properties and on into its sub-object properties by pressing the **Tab** or **Shift+Tab** keys.

**Note:** You can control the object and sub-object properties that appear on a symbol using display preferences (**Tools > Display Preferences**).

When a symbol is selected, clicking on one of its sub-objects selects that sub-object. Now, the `Customer activity` column sub-object is selected:



You can navigate up and down in the list of sub-objects by pressing the **Up Arrow** or **Down Arrow** keys. When a sub-object is selected, clicking on one of its properties lets you edit its value. Now the `Customer activity` column name is selected for editing:



To create a new sub-object at the end of the list, press **Ctrl+N**. To insert a new sub-object above the selected sub-object, press **Ctrl+I**. To delete the selected sub-object, press **Del**. Right-clicking a sub-object opens a contextual menu offering useful commands.

When a sub-object property is selected for editing, you can navigate right and left along the line of its editable properties by pressing the **Tab** or **Shift+Tab** keys.

**Note:** The following kinds of properties are not editable via object symbols:

- Boolean properties, such as the **Abstract** property on OOM class symbols.
- Custom indicators, such as those used to identify keys and indexes on PDM table symbols.
- Certain calculated properties, such as **Domain** or **Datatype** on PDM table symbols.

## Manipulating Link Symbols

You can add and remove corners to and from link symbols, and change the objects that they connect.

1. Draw a link between two objects:



2. Press **Ctrl** and click a point on the line to create a handle where you want to insert a corner:



3. You can add a second handle, or as many as you need:



4. To create a corner, click and hold the handle and then drag it to where you want the corner to be:



5. You can drag the other handles too:



6. To remove a handle (and corner), press **Ctrl** and click on the handle to remove:




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**Note:** To move an extremity of a link symbol from one object to another, click to select the link, and then drag the end handle to the new object.

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### Aligning, Ordering, Grouping, and Hiding Symbols

The Symbol menu provides various options for formatting and arranging your symbols.

Menu Item	Function
Format [Ctrl+T]	Opens the Symbol Format dialog, which allows you to control appearance and content of the selected symbols (see <i>Symbol Format Properties</i> on page 193).
Get Format	Copies the format of the selected symbol, making it available for applying to other symbols. Only available if a single symbol is selected.
Apply Format	Applies the format copied with Get Format to the selected symbols.

Menu Item	Function
Shadow [Ctrl+W]	Applies the standard shadow effect specified in the Symbol Format dialog to the selected symbols.
Adjust to Text [Ctrl+J]	Expands or shrinks the width of the selected objects to fit the length of their names.
Normal Size	Applies the default size specified in Display Preferences to the selected objects.
Fit to Page	Opens the Fit to Page dialog, which gives the number of pages currently used and allows you to specify a display scale, the number of pages to use, or to center the symbols on pages.
Auto-Layout	Rearranges the symbols in the diagram (see <i>Auto-Layout</i> on page 190).
Align	Provides various means for aligning the selected symbols (see <i>Aligning Selected Symbols</i> on page 191).
Disposition	<p>Arranges the selected symbols in various ways:</p> <ul style="list-style-type: none"> <li>• Horizontal [Ctrl+H]/Vertical [Ctrl+L] – Straighten selected link objects and makes them horizontal or vertical where possible.</li> <li>• Flip Horizontal/Flip Vertical – Reverses the relative positions of two or more selected symbols. In the case where Table_1 is directly above Table_2, selecting them and then choosing Flip Horizontal, will reverse their places so that Table_2 is now directly above Table_1.</li> <li>• Arrange Symbols – Spaces the selected symbols evenly.</li> <li>• Arrange Connectors – Straightens the selected link symbols and centers their endpoints in the objects that they connect.</li> <li>• Arrange Attach Points – Centers the endpoints of the selected link symbols in the objects that they connect.</li> <li>• Arrange Attached Text – Reverts labels associated with the selected link symbols to their default positions.</li> </ul>
Order	<p>Promotes or demotes the selected symbols in relation to other overlapping symbols in the diagram. You can:</p> <ul style="list-style-type: none"> <li>• Bring to Front</li> <li>• Send to Back</li> <li>• Bring Forward</li> <li>• Send Backward</li> </ul> <p>By default, when you place a free symbol such as a note on a design object symbol such as a table, the free symbol is placed behind the object, as free symbols are usually used as backgrounds.</p> <p>When symbols overlap, it may not be possible to select the symbol in the background, even if its handles are visible, without moving the symbol in front of it.</p>

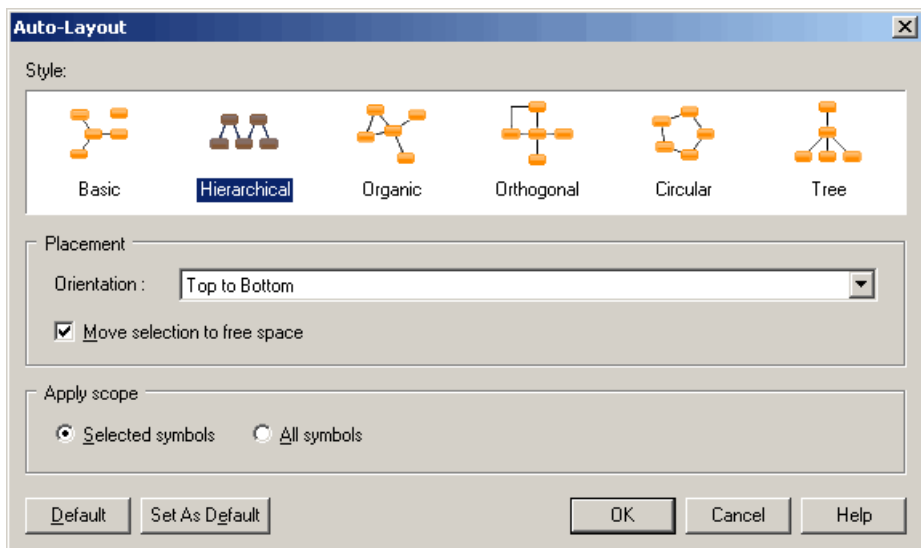
Menu Item	Function
Group Symbols	Groups selected symbols, allowing them to be selected, moved, and resized as a single block.
Ungroup Symbols	Separates selected objects that were previously grouped together.
Hide Symbols	Hides (makes invisible) the selected symbols. You may want to do this to make a large model more readable, or to focus on only a particular part of a model.
Show Symbols	Opens the Show Symbols dialog, which lets you select symbols in the diagram to show or hide (see <i>Showing and Hiding Symbols</i> on page 192).
Protect Symbols	Protects the selected symbols, making them impossible to select and edit.
Unprotect Symbols	Unprotects the selected symbols, making them available to select and edit.

### **Auto-Layout**

The auto-layout command automatically rearranges symbols in diagrams in order to simplify the routing by minimizing node and link overlaps and reducing the distances between related nodes.

**Note:** Auto-layout is not available for the OOM sequence diagram or any diagram containing swimlanes.

1. Select **Symbol > Auto-Layout** to open the Auto-Layout window.



2. Only the styles relevant for the current diagram can be selected. Choose one of the available styles:

- Basic – Provides minimal rerouting for any diagram style.
  - Hierarchical – Highlights the main direction or flow within a directed graph. You can additionally specify an orientation for the flow within the graph.
  - Organic – For undirected graphs.
  - Orthogonal - For undirected graphs. You can additionally specify an orientation for the flow within the graph.
  - Circular – Produces interconnected ring and star topologies to emphasize group and tree structures within a network. You can additionally specify a cycle or radiation shape.
  - Tree – For directed or undirected trees. You can additionally specify an orientation for the flow within the graph.
3. [if you have selected one or more symbols] Specify if you want to apply the auto-layout to all or only the selected symbols.

When applying Auto-Layout to a selection, you can additionally check the **Move selection to free space** option to extract the selected symbols from the main body of the diagram and place them in free space. PowerDesigner may create graphical synonyms (see *Creating Graphical Synonyms for Object Symbols* on page 199) for certain symbols in (or adjoining) the selection to minimize the length of connecting links.

4. Click **OK** to apply the auto-layout and return to the diagram.








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**Note:** You can, at any time, click the **Default** button to revert to the default auto-layout settings. Click the **Set As Default** button to set the currently selected style as the default.

---

### **Aligning Selected Symbols**

The Alignment toolbar and **Symbol Align** submenu both provide multiple tools for aligning symbols selected in the diagram.

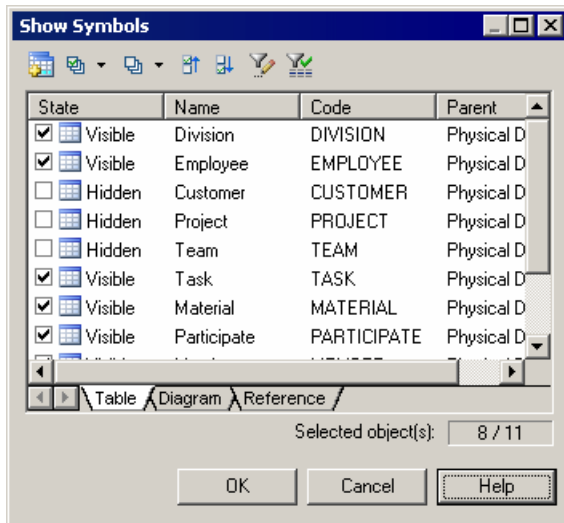
Tool	Action
	Left - Aligns left borders of selected symbols with leftmost selected symbol
	Center on vertical axis - Centers selected symbols on the most central selected symbol
	Right - Aligns right borders of selected symbols with rightmost selected symbol
	Same width - Stretches selected symbols to the width of the selection area (from the leftmost symbol to the rightmost symbol)
	Evenly space horizontally - Assigns equal space between three or more symbols on a horizontal axis
	Top - Aligns tops of selected symbols with topmost selected symbol
	Center on horizontal axis - Centers selected symbols on the most central selected symbol

Tool	Action
	Bottom - Aligns bottom borders of selected symbols with lowest selected symbol
	Same height - Stretches selected symbols to the height of the selection area (from the topmost symbol to the lowest symbol)
	Evenly space vertically - Assigns equal space between three or more symbols on a vertical axis

### Showing and Hiding Symbols



For PowerDesigner objects that have symbols, the symbol is automatically displayed in the diagram when you create the object. Hiding some symbols can improve the readability of your diagram. When you hide a symbol you do not delete it or the object.

To open the Show Symbols dialog, select **Symbol > Show Symbols** or right-click the diagram background and select **Diagram > Show Symbols**:






Object symbols are organized by type in sub-tabs. If shortcuts, traceability links and/or free symbols are present in the package, they appear on their own sub-tabs. You show and hide symbols by selecting or deselecting them.

The following tools are available for selecting symbols:

Tool	Description
	Allows you to select objects from other packages to display them in the current diagram.
	Selects all objects in the current tab. You can select all objects on all tabs by pressing the <b>Ctrl</b> key as you click or by clicking the arrow and selecting All Pages.



Tool	Description
	Deselects all objects in the current tab. You can deselect all objects on all tabs by pressing the <b>Ctrl</b> key as you click or by clicking the arrow and selecting All Pages.
	Moves all selected object to the top of the list
	Moves all selected object to the bottom of the list

**Note:** To hide one or more symbols directly from the diagram, select them and then choose **Hide Symbols** from the **Symbol** or contextual menu. To show a symbol without using the dialog, drag the object from the Browser or another diagram into the diagram. If you drag the symbol from another package or model, a shortcut to the object will be created in the destination model.

When you hide or show links or objects with links, the following rules apply:

- Hide an object - Links attached to the hidden object are also hidden
- Show an object - Links attached to the object are shown if the object at their other extremity is already visible.
- Show a link - The objects at both ends are also shown.

In a CDM, the following rules apply:

- Hide a parent entity - Inheritances for which the hidden entity is the parent are also hidden.
- Show an association - Entities and association links attached to the association are also shown.
- Show an association link - Entities and associations attached to the association link are also shown.
- Show an inheritance - Parent and child entities and inheritance links attached to the inheritance are also shown.
- Show an inheritance link - Parent and child entities and inheritances attached to the inheritance link are also shown.

## **Symbol Format Properties**

You can change the size, line style, fill, shadow, font, alignment, shape and content of symbols in the Symbol Format dialog. Some items may not be available if your modeling methodology restricts the modification of symbol format or content.

You may arrive at the Symbol Format dialog when changing the format of:

- One or more individual symbols – select the symbols and then press **Ctrl+T**, select **Symbol > Format**, or **Format** from the contextual menu.
- All symbols - via display preferences (see *Display Preferences* on page 206).
- Custom symbols defined for extensions – see *Customizing and Extending PowerDesigner > Extension Files*.

---

**Note:** When defining the format of custom symbols in the Resource Editor, each tab in the Symbol Format dialog contains two additional options, **Apply format to symbols**, and **Allow users to modify symbol format**, which allow you to control the default format of symbols and whether users can modify them to a very fine degree. For more information on these options, see *Controlling the Format of Custom Symbols* on page 197.

---

### Size Tab

The Size tab controls the size of the symbol and how the size can be manipulated:

Property	Description
Current size	Specifies the width and height (in pixels) of the symbol.
Normal size	[read-only] Specifies the default width and height (in pixels) for symbols of this kind.
Auto-adjust to text [Ctrl+J]	[Default] Auto-resizes the width of the symbol to display all the text it contains up to the value specified for word wrapping in the diagram (see <i>General Settings Display Preferences</i> on page 208).  This option is disabled if you select the <b>Keep size</b> preference or manually resize the symbol and can be reapplied by selecting the symbol and pressing <b>Ctrl+J</b> .
Keep aspect ratio	Maintains the ratio of height to width when manually resizing the symbol.
Keep center	Maintains the center position of the symbol when resizing it.
Keep size	Prevents the resizing of symbols through: <ul style="list-style-type: none"> <li>• Manual resizing</li> <li>• The <b>Auto-adjust to text</b> preference (which is mutually exclusive with this preference).</li> <li>• The creation of sub-object symbols in editable composite symbols (see <i>Using Composite View to Display Sub-Objects within a Symbol</i> on page 198). Selecting this option prevents the symbol from growing to accommodate the addition of sub-symbols and may cause their display to be truncated due to lack of space.</li> </ul>

### Line Style Tab

The Line Style tab controls the color, size and format of lines (for link and other one-dimensional symbols) and borders (for two-dimensional symbols, such as classes or tables). You can modify the line style of any symbol in the model.

Property	Description
Color	Specifies the color of the line or border.
Width	Specifies the thickness of the line or border.

Property	Description
Style	Specifies the format of the line or border, such as invisible, solid, dashed or dotted.
Corners	[Link and line symbols only] Specifies the format of corners, such as sharp or rounded right-angles and free angles.
Arrow	[Link and line symbols only] Specifies the format of the link or line symbol at its Beginning, Center, and End.
Use perpendicular arrow	[Link and line symbols only] Specifies that the link or line object always touches objects at its ends at a right angle. This option allows you to use free angles for the body of a link or line object, while retaining a connection at right angles for its beginning and end.

---

**Note:** These options may be overridden by the design semantics of a link symbol (such as a PDM reference).

---

### *Fill Tab*

The Fill tab controls the color, content, and effects for symbol filling.

Fill effects	Description
Fill color	<p>Specifies the color to use for the fill.</p> <p>The Fill color check box is available for free symbols, packages, interaction fragments, and swimlanes, and when cleared will create a transparent symbol. This can be useful when you wish to use an "in-box" UML representation, for packages for example.</p> <p>Note that transparent objects can only be selected by clicking near their borders.</p>
Image	Specifies a graphic file to display within the symbol. Click the <b>Modify</b> button to select a file.
Display Mode	Specifies the alignment of the image within the symbol.
Gradient	Specifies the gradient fill options. Click the <b>Modify</b> button to open a dialog allowing you to control Start and End colors, End Color Luminosity, Shading Style and Gradient Mode.

### *Shadow Tab*

The Shadow tab allows you to add a standard, 3D effect or gradient shadow to objects in a diagram.

### Font Tab

The Font tab allows you to define the display preferences for the font, size, style, and color of text associated with symbols in the model. When you modify font preferences, they apply to all existing and new symbols.

### Text Alignment Tab

The Text Alignment tab allows you to define the alignment of text in text boxes and rectangles, ellipses, rounded rectangles, and polygons.

---

**Note:** You can only control the text alignment for these shapes, and not for model object symbols. When working with RTF, all the options but Vertical are disabled.

---

Parameter	Description
Center	Centers the text horizontally and vertically.
Word wrapping	Auto-wraps text in the symbol.
Horizontal	Aligns text to the left, center, or right on the horizontal axis.
Vertical	Aligns text to the top, center, or bottom on the vertical axis

### Custom Shape Tab

The Custom Shape tab allows you to define a new symbol shape for most non-link symbols.

---

**Note:** Custom shapes with the **Content position** set to Under cannot display collections or attribute icons.

---

Property	Description
Enable custom shape	Enables or disables the customization of a symbol shape
Shape Type	<p>Specifies the type of shape to be used. Choose one of the following values, and then click the <b>Browse</b> button to select an image (see <i>Browsing for Images</i> on page 200):</p> <ul style="list-style-type: none"> <li>• Predefined symbol - Default shape assigned to symbols in PowerDesigner.</li> <li>• Metafile (EMF, WMF) - Representation using geometrical formulas allowing for resizing and stretching.</li> <li>• Bitmap (DIB, RLE, JPG, JPEG, TIF, TIFF, PNG) - Representation of a graphics image consisting of rows and columns of dots.</li> <li>• Icon (ICO) - Small picture representing an object, usually smaller than standard PowerDesigner symbols.</li> </ul>

Property	Description
Shape Name	List of the available shapes of the selected type. Click the <b>Browse</b> button to select shapes.
Content position	Specifies where the object name and any other properties should be displayed on (or under) the symbol (Center option is not available for icon shapes).

### *Content Tab*

The Content tab allows you to specify the information that you want to display on the symbol. The properties that are listed on this tab as being available for selection are controlled by the content display preferences (see *Content Display Preferences* on page 210).

### *Sub-Objects Tab*

The Sub-Objects tab is only available when you open the Format tab after having selected a single object. It allows you very fine control over the sub-objects (such as PDM table columns or OOM class attributes and operations) that you want to display inside your object symbol. For each individual sub-object, you can decide whether to display it or not, and what font to use for its display.

---

**Note:** For a collection of sub-objects to be available for selection and customization here, the collection must be selected for display in the object's content display preferences (see *Content Display Preferences* on page 210). Where the number of lines to display for a collection is limited in the display preferences, that limit will take precedence over any choices you make here.

---

Each collection of sub-objects that is enabled in the display preferences has its own sub-tab. For each sub-object, you can:

- Select to display or hide it in the parent object symbol by selecting or deselecting its checkbox in the **[D]isplay** column.
- Apply a specific font to its display by clicking the **Select font tool** or the ellipsis button in the **Specific Font** column.

---

**Note:** When not all sub-objects in a collection are selected for display, the parent object symbol will display ellipses to indicate that more items are available.

---

### **Controlling the Format of Custom Symbols**

When defining custom symbols for your object extensions, you may want to enforce certain aspects of the symbol format, while allowing users some liberty to change others. If you open the Symbol Format dialog from a custom symbol in the Resource Editor, you can control the default format options for the symbol, and whether users can edit them, on a per-tab basis.

For example, you could extend the PDM table metaclass with a criteria to specify a custom symbol with a red border for tables that are anticipated to contain more than 1m records. You may want to enforce this border style for all such tables while allowing users to change the font, size, content, and other aspects of the symbol format.

When you access the **Symbol Format** dialog from a custom symbol in the Resource Editor, the following additional options are available at the top of each tab:

Option	Description
Apply <i>format</i> to symbols	Specifies that the format options on the tab will be applied to custom symbols at creation time or whenever the appropriate criteria are met or the specified stereotype applied.  If this option is not selected, the standard display preferences for the format options on the tab will be applied and users are free to modify them.
Allow users to modify symbol <i>format</i>	Specifies that users can modify the format options for the symbol and that any changes that are made will be respected in the event that the definition of the custom symbol is updated.  If <b>Apply format to symbols</b> is selected and this option is unselected, then the format options specified on this tab cannot be changed by the user.

Click the **Advanced** button to open the **Customize Content** dialog to add or removed properties from this tab (see *Customizing Content Display Preferences* on page 213).

For detailed information about extending objects and creating custom symbols for them, see *Customizing and Extending PowerDesigner > Extension Files*.

### **Finding Symbols from the Browser, Object Lists, and the Result List**

You can find all the symbols representing an object listed in the Browser, in a model list, or in the Result List window by right-clicking the object and selecting **Find in Diagram**.

If the object has only one symbol associated with it, the appropriate diagram is opened in the canvas with the symbol centered.

If the object has several symbols in the present package or there are symbols representing shortcuts to the object (see *Chapter 15, Shortcuts and Replicas* on page 455) in other packages or models open in the Workspace, the Select Symbol dialog opens listing all the available symbols with their parent model and diagram. To show only the symbols in the present package in this dialog, deselect the **Show symbols from other packages** option. Select a symbol and click **OK** to open its diagram in the canvas.

### **Using Composite View to Display Sub-Objects within a Symbol**

Many objects (packages, processes, classes, activities, states, EAM objects, etc.) have the capability to display sub-objects within their symbols through one or more *composite view* modes. Depending on the type of object, the sub-objects can be displayed either as a static sub-diagram within the symbol or as dynamically editable symbols that you can create and arrange directly from the parent diagram.

To toggle between the different composite view modes, right-click a symbol and select **Composite View** and then one of the following commands:

- None - display the parent symbol only without any sub-objects
- Read-only (Sub-Diagram) - display sub-objects in a non-editable sub-diagram that can be resized as necessary. To access the sub-diagram, press **Ctrl** and double-click the symbol
- Editable - allow the creation and arrangement of sub-objects directly within the symbol in the parent diagram.
- Adjust to read-only view - resizes the symbol to display all the objects in the read-only view.

---

**Note:** Not all modes are available for all objects that support composite view. Certain objects (for example, processes in the BPM) must be decomposed before you can access composite view.

---

For information about the specific objects supporting composite view, see the appropriate modeling guide.

## Creating Graphical Synonyms for Object Symbols

Graphical synonyms let you depict an object more than once within a diagram. This can improve readability by reducing the length or complexity of links when you have an object that is linked to many other objects. You create a graphical synonym by right-clicking a symbol and selecting **Edit > Create Graphical Synonym**. You can create as many graphical synonyms as you want within the same diagram, including graphical synonyms of graphical synonyms and of shortcuts. Each graphical synonym displays the name of the object followed by a colon and the number of the synonym.

---

**Note:** A graphical synonym is merely a second symbol representing an object within the same diagram. You can add the same object to other diagrams in the same package or model by dragging and dropping it to them to create an ordinary symbol. If the object must be referenced in another model (or in another package in the model), you need to create a shortcut (see *Chapter 15, Shortcuts and Replicas* on page 455).

---

In the following example, `Employee : 1` and `Employee : 2` both represent the `Employee` table:

Employee : 1		Employee : 2	
id	<Undefined>	id	<Undefined>
first name	<Undefined>	first name	<Undefined>
family name	<Undefined>	family name	<Undefined>

If you move an object for which you have created graphical synonyms from one package or model to another, shortcuts are created for the graphical synonyms in the original package.

---

**Note:** To find any graphical synonyms of a symbol, right-click the symbol, select **Edit > Find Graphical Synonym**, and then select a graphical synonym from the list. The graphical synonym is centered and selected in the diagram window.

---

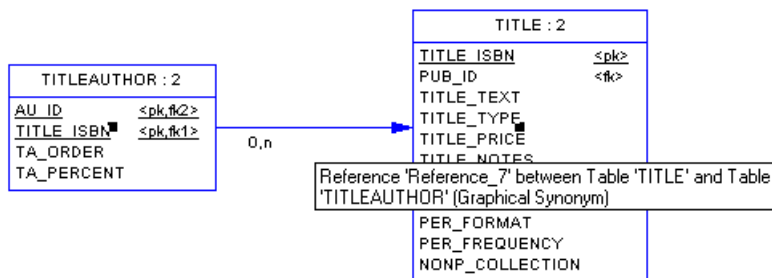
You can create graphical synonyms for link objects but only if both they and the symbols at both their extremities (which will also be duplicated) support them. The following object symbols do not support graphical synonyms:

- CDM - inheritances and inheritance links
- OOM - swimlanes, synchronizations, decisions, transitions, instance links, messages, association class links, and interaction frames, fragments, and references
- BPM - swimlanes, synchronizations, decisions, and flows
- All - free symbol line

---

**Note:** Though you cannot visually distinguish a graphical synonym of a link from a normal link (unless you display the name attribute), when you select a link symbol, it is identified as a graphical synonym in its tooltip:

---

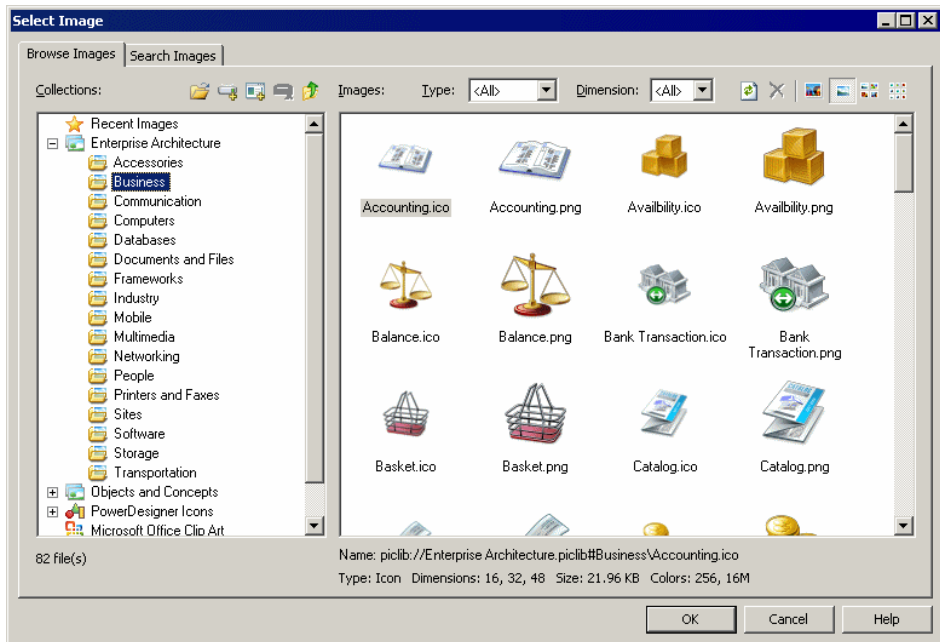


### Browsing for Images

The Select Image dialog lets you manage the images that you use in your model diagrams, and to insert them into your models as object symbols, diagram backgrounds, etc.






1. Open the Select Image dialog in any of the following ways:
  - Right-click a diagram symbol and select **Change Image**.
  - From the Symbol Format dialog **Custom Shape** tab, click the **Enable Custom Shape** check box, and then click the **Browse** button next to the **Shape type** property (see *Symbol Format Properties* on page 193).
  - From the Symbol Format dialog **Fill** tab, click the **Modify** button in the **Fill Effects** group box (see *Symbol Format Properties* on page 193).
  - Select **Edit > Import Image** (see *Importing and Exporting Model Graphics* on page 218).








2. Click a collection in the **Collections** pane to display its available images in the **Images** pane.

The following tools are available for this pane:

Tool	Description
	Open Image File - Lets you browse to an image file to select it directly without passing by an image collection.
	Add Directory – Adds a directory to the list of collections. When you add a directory, any sub-directories containing images are also added along with any intermediate directories required to represent the directory tree.
	Add Executable or DLL - Adds an executable or DLL and all the images associated with it to the list of collections.
	Remove Directory, Executable, or DLL – Removes a directory from the list of collections. Predefined directories, such as Recent Images or Microsoft Office Clip Art cannot be removed.
	Up – Moves up a level in the collections tree.

3. [optional] In the **Images** tab, select an image type and/or dimension to filter by from the **Type** and **Dimension** lists.

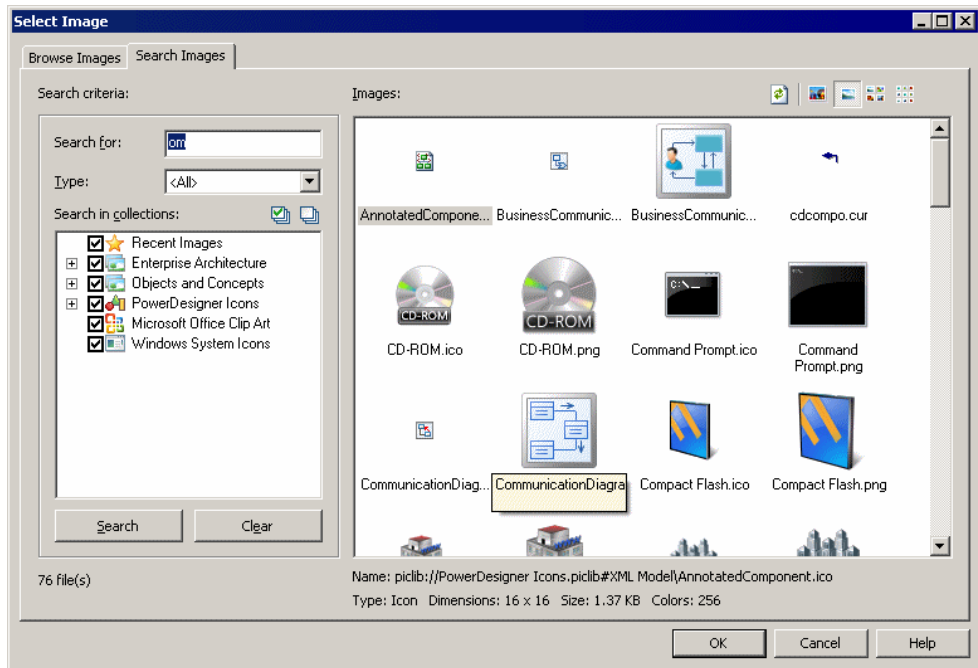
The following tools are available for this pane:

Tool	Description
Type	Filters images by type, such as PNG, Bitmap, Cursor, etc.
Dimension	Filters images by dimension, such as 16, 48, 128, etc.
	Refresh Preview – Refreshes the list of available images.
	Delete Recent Image – Deletes a selected recent image.
	Extra Large / Large / Medium / Small Icons – Change the display size of images in the Images pane.

4. Select an image and click **OK** to return to the Symbol Format dialog or to display the image in the diagram.

### Searching for Images

You can search for images among your collections on the **Search Images** tab of the Select Image dialog.



1. Specify the appropriate search criteria in the **Search Criteria** pane. You can specify:









- **Search for** – Enter all or part of a filename to search against. Wildcards are automatically applied so that for example, entering "ec" will return an image named "vector.png".
  - **Type** – Select the type of image to search for, such as PNG, Bitmap, Cursor, etc.
  - **Search in collections** – Specifies the scope of the search by selecting or deselecting collections to search in.
2. Click the **Search** button to display the result of the search in the Images pane.
  3. Select an image in the **Images** pane, and click **OK** to return to the Symbol Format dialog or to display the image in the diagram.




The **Clear** button resets the search criteria to the default values.

## Decorative Symbols

Lines, ellipses, rectangles, and other decorative symbol tools available in the Toolbox have no technical meaning, but can help with readability. You can use them to surround parts of a model to, for example, distinguish domains of activity.

With each of the following tools, click and hold to draw, and release to complete the shape. To resize a completed shape, click it and drag a handle.

Tool	Description
	Insert an area where you can write free notes
	Draw either a graphical link between free symbols, a note link between a note and an object, or a traceability link between objects (see <i>Creating Traceability Links</i> on page 431)
	<p><b>Title</b> - A diagram title box retrieves from the model properties and displays such information as: the model and the package to which the diagram belongs, the name of the diagram itself, the author and version of the model and the date of modification.</p> <p>If no Author is specified in the model property sheet, the user name specified in the Version Info page is used.</p> <p>You can choose to display the repository version number of the model or a user-defined version number on the Title display preferences page.</p>
	<b>Text</b> - You can insert free text in your model independently of any shape, and can select and move it like any symbol.
	<b>Line</b>
	<b>Arc</b>
	<b>Rectangle</b> - Press <b>Ctrl</b> while drawing to create a square.
	<b>Ellipse</b> - Press <b>Ctrl</b> while drawing to create a circle.

Tool	Description
	<b>Rounded Rectangle</b> - Press <b>Ctrl</b> while drawing to create a rounded square.
	<b>Polyline</b> - Release the mouse button at each point where you want to create a corner. Right-click to finish.
	<b>Polygon</b> - Release the mouse button at each point where you want to create a corner. Right-click to finish and close the polygon.

**Note:** To add text to the symbol, double-click it to open an editor window. Lines and polylines support the display of text at their center, source, and destination (see *Text Editor Tools* on page 204).

To change the format of the symbol, right-click it and select **Format** (see *Symbol Format Properties* on page 193).

### **Creating a Graphical Link Between Any Two Symbols**

You can create a graphical link between any two symbols in the diagram. This link is purely graphical and does not convey any semantics.










1. Select the **Polyline** tool in the Toolbox.
2. Click inside the first symbol and while continuing to hold down the mouse button, drag the cursor to a second symbol. Release the mouse button inside the second symbol and right-click.





A link is created. You can double-click the link symbol to open the **Link Symbol Text** dialog box and edit the link.

### **Text Editor Tools**

PowerDesigner provides an internal rich text format (rtf) editor, and supports the use of external text editors.

The following tools are available on the editor toolbar (the **Edit With** command and various formatting commands and tools are only available in RTF editors):

Tools	Description
	<b>Editor Menu [Shift+F11]</b> - Contains the following commands: <ul style="list-style-type: none"> <li>• <b>New [Ctrl+N]</b> - Reinitializes the field by removing all the existing content.</li> <li>• <b>Open... [Ctrl+O]</b> - Replaces the content of the field with the content of the selected file.</li> <li>• <b>Insert... [Ctrl+I]</b> - Inserts the content of the selected file at the cursor.</li> <li>• <b>Save [Ctrl+S]</b> - Saves the content of the field to the specified file.</li> <li>• <b>Save As...</b> - Saves the content of the field to a new file.</li> <li>• <b>Select All [Ctrl+A]</b> - Selects all the content of the field.</li> <li>• <b>Find... [Ctrl+F]</b> - Opens a dialog to search for text in the field.</li> <li>• <b>Find Next... [F3]</b> - Finds the next occurrence of the searched for text.</li> <li>• <b>Find Previous... [Shift+F3]</b> - Finds the previous occurrence of the searched for text.</li> <li>• <b>Replace... [Ctrl+H]</b> - Opens a dialog to replace text in the field.</li> <li>• <b>Go To Line... [Ctrl+G]</b> - Opens a dialog to go to the specified line.</li> <li>• <b>Format... [Ctrl+M]</b> - Opens a dialog to specify fonts and styles.</li> <li>• <b>Remove All Formats [Ctrl+L]</b> - Removes all formatting from the content of the field.</li> <li>• <b>Paragraph... [Ctrl+R]</b> - Opens a dialog to specify paragraph indentation, spacing, and alignment.</li> <li>• <b>Tabs... [Ctrl+B]</b> - Opens a dialog to specify tab stop positions and alignment.</li> </ul>
	<b>Edit With</b> - Opens the content of the field in an external editor. Click the down arrow to select a particular editor or <b>Choose Program</b> to specify a new editor. Editors specified here are added to the list of editors available at <b>Tools &gt; General Options &gt; Editors</b> .
	<b>Save [Ctrl+S]</b> - Saves the content of the field to the specified file.
	<b>Print [Ctrl+P]</b> - Prints the content of the field.
	<b>Find [Ctrl+F]</b> - Opens a dialog to search for text.
	<b>Cut [Ctrl+X], Copy [Ctrl+C], and Paste [Ctrl+V]</b> - Perform the standard clipboard actions.
	<b>Undo [Ctrl+Z] and Redo [Ctrl+Y]</b> - Move backward or forward through edits.
	<b>Format [Ctrl+M]</b> - Opens a dialog to specify fonts and styles.
	<b>Bold, Italic, and Underline</b> - Format the selected text.

Tools	Description
  	<b>Align Left, Align Center, and Align Right</b> - Align the selected text.
	<b>Bullets</b> - Indent and bullet the selected text.

**Note:** When editing free text on decorative symbols, use the radio buttons at the bottom of the dialog to switch between

- **Plain text** - text formatting is controlled by the display preferences for free symbols
- **RTF** – text formatting can be controlled directly in the text input window

## Display Preferences

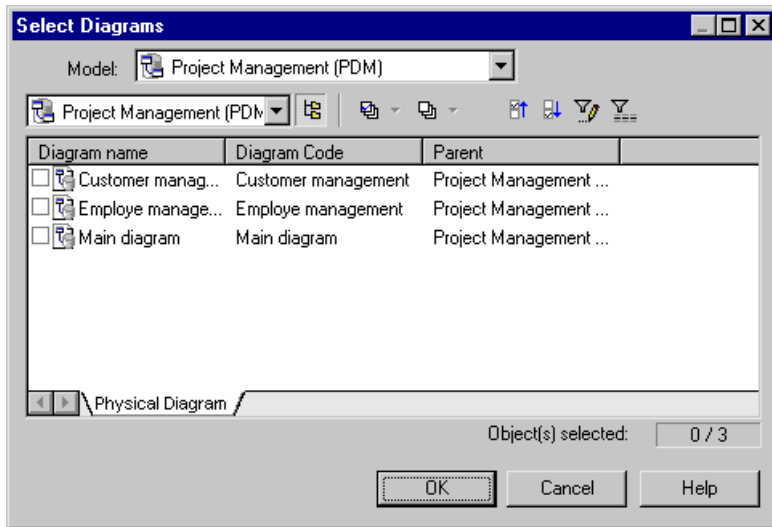
Display preferences control the format of the symbols in your diagrams and the information displayed on them. You can control the default display preferences for all objects, or set preferences for all, selected, or new objects in the current diagram.

1. [optional] Select one or more symbols to which you want to apply format or content changes. If you do not select any symbols, you can choose to apply any changes to all objects or only to objects created after your changes.
2. Select **Tools > Display Preferences** to open the Display Preferences dialog.
3. Select an object in the Category list and change the preferences as appropriate in the right-hand panel. The General Settings category controls preferences for the diagram as a whole (see *General Settings Display Preferences* on page 208).

On each of the pages, you can, at any time click:

- the **Default** button, which reverts any changes to their default values
- the **Set As Default** button, which assigns the current values to defaults.

4. [optional] Click the **Apply To** button to open the Select Diagrams dialog, select the diagrams to which you want to apply your changes, and click **OK**:

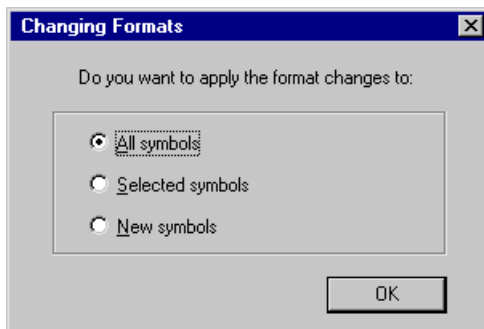


You will be asked whether you want to apply your changes to all the symbols in the selected diagrams. If you click:

- Yes – All existing and new symbols will reflect your changes to the Format, General and Content display preferences.
- No – New symbols only will reflect your changes. Only the General and Content display preferences are applied to existing symbols. The Format changes are canceled.
- Cancel – Your changes will not affect any symbols in any diagrams except the current one.

In each case, you return to the Display Preferences dialog.

5. On the Display Preferences dialog box, click **OK**. The Changing Formats dialog box will open:



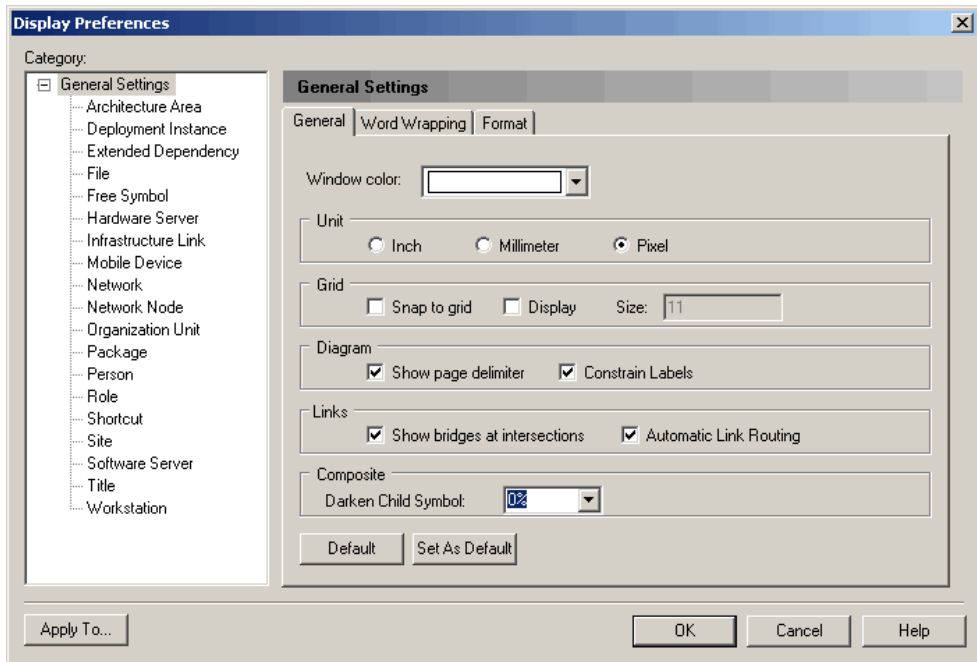
The choices in this dialog apply only to the present diagram and will not override your choices made in the Select Diagrams dialog.

6. Click **OK** to apply your changes

**Note:** If you make changes in the Display Preferences dialog and these are not reflected in some or all of the symbols in your diagram, this may be because of display constraints enforced by your modeling methodology. For detailed information about how such constraints are defined, see *Customizing and Extending PowerDesigner > Extension Files*.

## General Settings Display Preferences

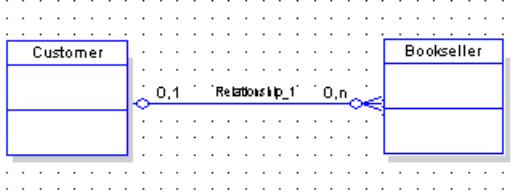
The General Settings category allows you to control the overall look of the diagram.



The following preferences are available on the **General** tab:

Property	Description
Window color	Sets the background color for the diagram.
Unit	Specifies the measurement unit for symbol size. You can choose between inches, millimeters, and pixels.



Property	Description
Snap to grid	<p>Automatically aligns all objects in the diagram to the anchor points of a grid. Control the visibility of the grid, and the number of anchor points per square inch with the <b>Display</b> and <b>Size</b> options:</p> 
Show page de-limiter	Displays lines showing the limit of pages on the diagram background.
Constrain labels	Limits the distance to which you can displace labels from link objects. Uncheck this option to be able to move link labels anywhere in your diagram.
Show bridges at intersections	Creates a bridge (or "line hop") when two links cross to show that they do not intersect. This preference has no effect on link symbols with free curve corners or CDM association links.
Automatic link routing	<p>Calculates link paths to avoid crossing object symbols and to space links regularly. You can manually move routed links, and the algorithm will respect your choices and exclude such links from its calculations. To revert a manually moved link to its automatically routed position, right-click it and select <b>Reroute Link</b>.</p> <p>This preference has no effect on links with free curve or free angle corners, CDM association links, or any links in EAM organization charts, BPM process hierarchy diagrams, OOM sequence diagrams, or XSM XML diagrams.</p>
Organization unit swimlane	[diagrams with swimlanes] Specifies that organization units will be displayed as swimlanes. You must also specify whether swimlanes have a <b>Horizontal</b> or <b>Vertical</b> orientation.
Darken Child Symbol	[diagrams with composite symbols] Specifies that the symbols of child objects are darker than those of their parents in order to make them stand out more.
Orientation	[diagrams with tree structures] Specifies whether branches expand in a <b>Horizontal</b> (left to right) or <b>Vertical</b> (top to bottom) orientation.

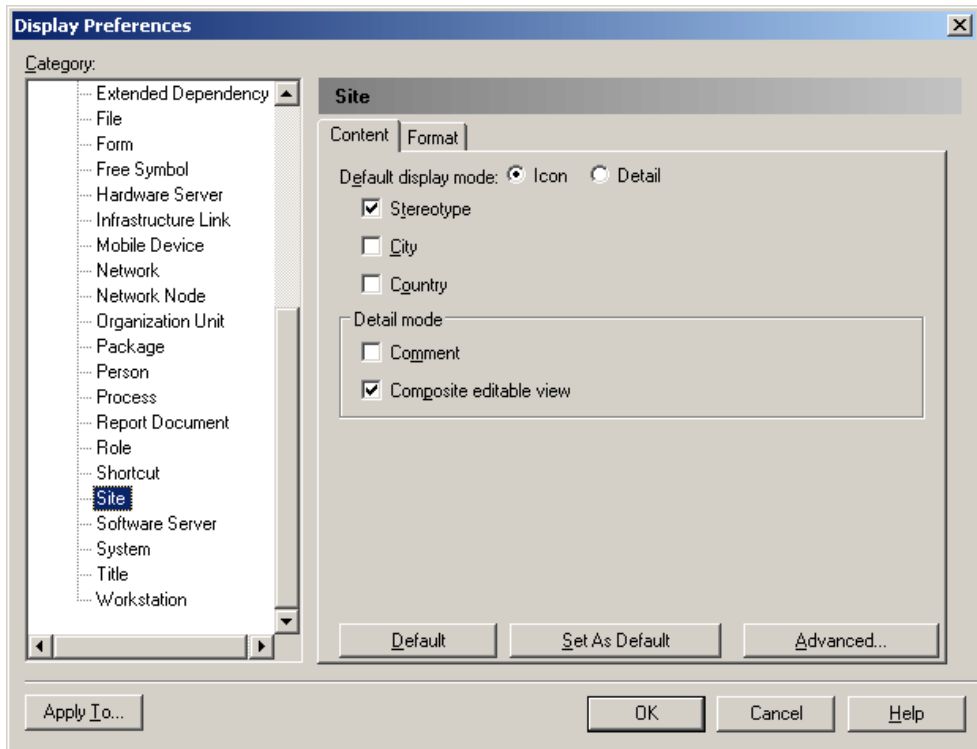
The following preferences are available on the **Word Wrapping** tab:

Preference	Description
Word wrapping	<p>Controls the display of text on symbols and links. You can choose between:</p> <ul style="list-style-type: none"> <li>• None</li> <li>• Truncation - Truncates name (or code), to the specified length</li> <li>• Word wrapping - Wraps name and code text onto additional lines (up to the specified length) after the specified wrap character</li> </ul> <p>This preference is overridden if you manually resize a symbol or link text label. To reapply the wrapping specified here, select the symbol or link text label and press <b>Ctrl+J</b>.</p>
Wrap characters	Specifies a set of characters after which word wrapping is possible.
Display overlay for non-local objects	Enables the display of an overlay on objects being reused in the same container but with distinct location. For instance an activity can be reused under another activity of the same package or an inner class can be referenced by another class of the same package. The overlay is a mirror image of the shortcut overlay (see <i>Creating Shortcuts</i> on page 457).

The **Format** tab can be used to set the default size for all symbols in the diagram. Values entered here can be overridden for specific objects on the **Format** tab for each object type (see *Format Display Preferences* on page 212).

## **Content Display Preferences**

The Content category allows you to control what information is displayed in object symbols. You can modify the information displayed on each type of object by selecting it in the list.



Choose the information that you want to display by selecting the appropriate checkboxes. You can customize the properties that are available to be displayed by clicking the **Advanced** button (see *Customizing Content Display Preferences* on page 213).

The following special preferences are available for certain objects that can act as containers for other objects:

Preference	Description
Default display mode	<p>Specifies the way the object will be displayed by default:</p> <ul style="list-style-type: none"> <li>• Icon</li> <li>• Detail – a rectangle permitting the display of additional information</li> </ul> <p>This preference is only available if the object supports both modes.</p> <hr/> <p><b>Note:</b> Multi-line fields and collections (such as table columns or class operations) cannot be displayed in icon mode or on link symbols</p>

Preference	Description
Detail mode	<p>Specifies the additional information that will be displayed in Detail mode:</p> <ul style="list-style-type: none"> <li>• Comment – from the General tab of the object's property sheet</li> <li>• <i>[collections]</i> – for example, sub-sites, applications, etc.</li> <li>• Composite view - displays child objects as symbols within the object symbol. If this option is present, it cannot (unlike the other preferences) be removed from this screen</li> </ul>

## **Format Display Preferences**

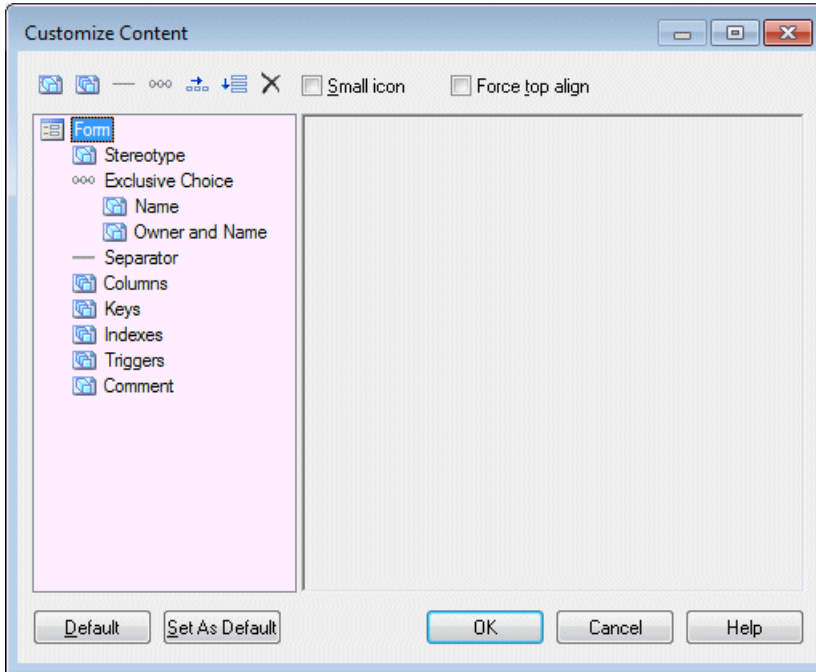
The **Format** tab allows you to control the look of object symbols and provides a preview for the preferences selected.

Click the **Format** tab of the **General Settings** category, to set the default horizontal and vertical size of all symbols in the diagram containing text (measured in units of 1/7200 of an inch).

For objects, click the **Modify** button to change the line style, fill, shadow, font, and custom shape of symbols (see *Symbol Format Properties* on page 193).

## Customizing Content Display Preferences





Click the **Advanced** button in the bottom-right corner of an object's **Content** tab to organize the information that is available for display on the symbol.



The list in the left hand pane shows the properties that are currently available to display on the symbol in the Display Preferences dialog. In the case of link symbols the list contains three sublists, Source, Center, and Destination, which allow you to specify different content to display on each of these parts of the link symbol.

You can drag and drop items to reorder the list, and use the following tools to modify it:

Tool	Description
	<b>Add Attributes</b> – allows you to select additional attributes to add to the list (see <i>Configuring the Display of Attributes</i> on page 215).
	<b>Add Collections</b> – allows you to select additional collections (such as table columns, class operations, etc) to add to the list (see <i>Configuring the Display of Collections</i> on page 216).
	<b>Add Separator Line</b> – inserts a separator line after the item selected in the list. Separators added to horizontal layouts display as vertical lines.

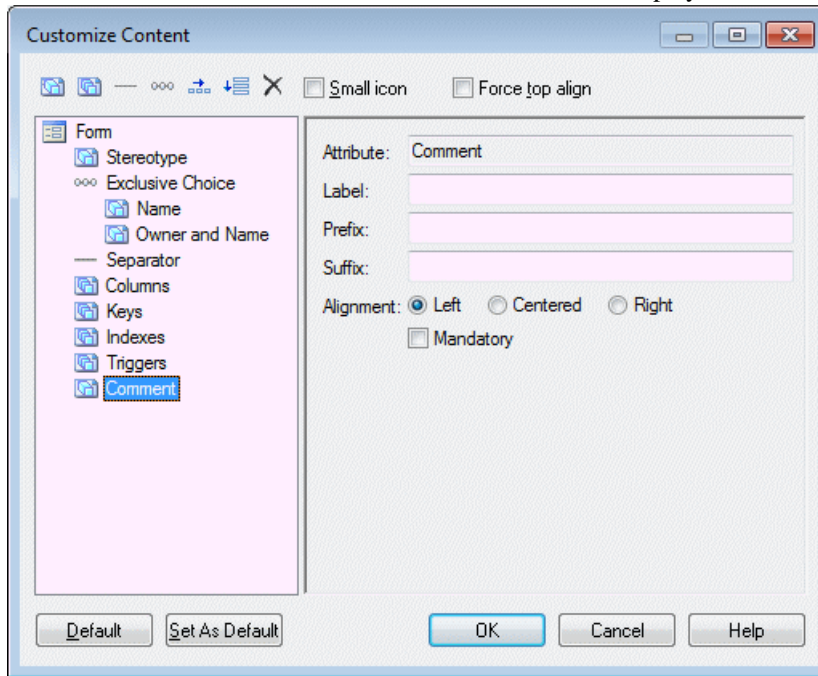
Tool	Description										
	<b>Add Exclusive Choice</b> - inserts an item under which you can group properties from which your users will choose one to display (see <i>Configuring the Display of Exclusive Choices</i> on page 217).										
	<b>Add Horizontal Layout</b> - inserts a horizontal layout. To arrange attributes to display side by side, drag them onto the horizontal layout in the list. <table border="1" data-bbox="331 388 865 493"><tr><td colspan="3">Account (250) (Generated)</td></tr><tr><td>Login</td><td>Variable characters (250) &lt;M&gt;</td><td rowspan="3">For connecting to a computer system.</td></tr><tr><td>Password</td><td>Variable characters (250) &lt;M&gt;</td></tr><tr><td>Administrator</td><td>Boolean</td></tr></table>	Account (250) (Generated)			Login	Variable characters (250) <M>	For connecting to a computer system.	Password	Variable characters (250) <M>	Administrator	Boolean
Account (250) (Generated)											
Login	Variable characters (250) <M>	For connecting to a computer system.									
Password	Variable characters (250) <M>										
Administrator	Boolean										
	<b>Add Vertical Layout</b> - inserts a vertical layout. To arrange attributes to display one under the other, drag them onto the vertical layout in the list. Vertical layouts are often used in conjunction with a horizontal layout, to provide columns of attributes.										
	<b>Delete</b> – removes the selected item from the list.										

The following options control the overall look of symbols:

Tool	Description
<b>Small icon</b>	Places a small object icon in the top-left corner of the symbol in detail mode.
<b>Force top align</b>	Forces top alignment in the symbol for object attributes, such as Name. If this option is not selected, these properties are centered on the vertical axis.

### Configuring the Display of Attributes

An attribute is any single value property. To enable the display of an attribute, click the **Add Attributes** tool, select attributes or extended attributes to display, and click **OK**.

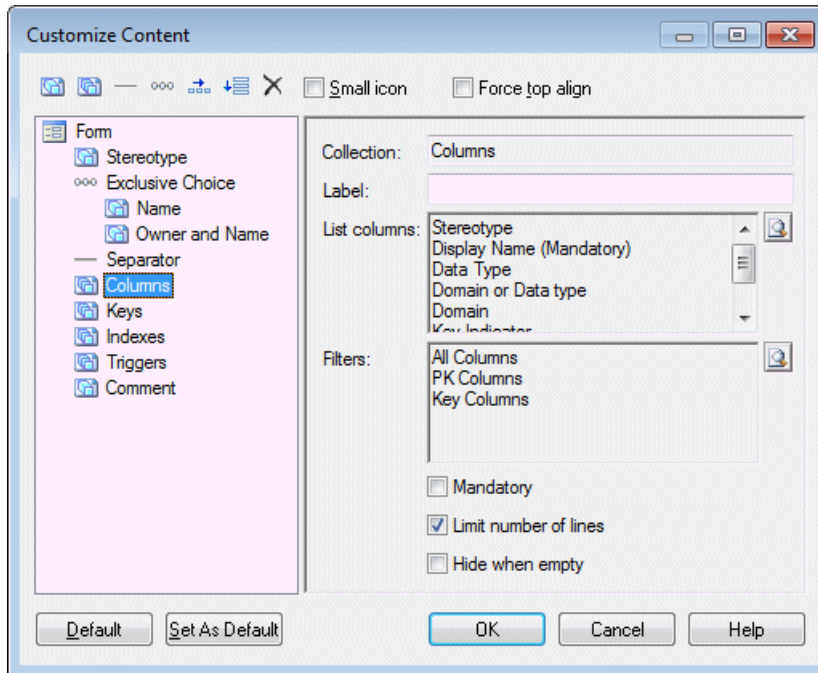


Click on an attribute in the list to set the following options:

Option	Description
Label	Specifies a label to use in the Display Preferences dialog in place of the attribute's name.
Prefix/Suffix	[text items] Insert a prefix and suffix before and after the value of the attribute.
Alignment	[text items] Specifies the alignment of the text.
True/False	[booleans] Specifies a value to display for true and false. For example, for an attribute <i>Annotated</i> , you could specify <i>Annotated</i> and <i>Not Annotated</i> for true and false. By default, boolean properties are displayed if they are true and do not appear if they are false.
Mandatory	Specifies that the attribute must be displayed on the symbol, and is not available for deselection in the Display Preferences dialog.

### Configuring the Display of Collections

A collection is a group of sub-objects or related objects. To enable the display of a collection, click the **Add Collections** tool, select collections or extended collections to display, and click **OK**.



Click on a collection in the list to set the following options:

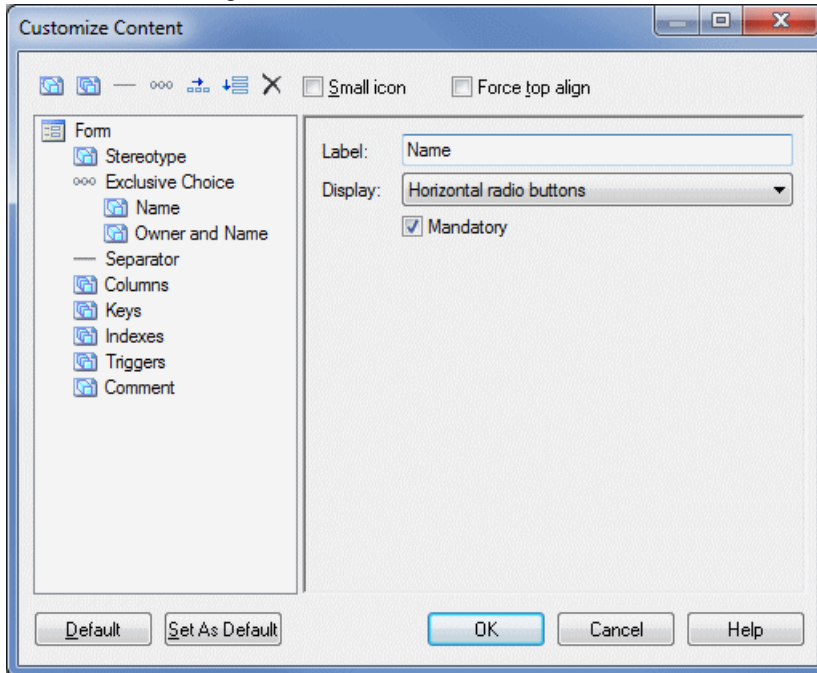
Option	Description
Label	Specifies a label to use in the Display Preferences dialog in place of the collection's name.
List columns	Specifies the properties displayed for each object in the collection. Click the <b>Select</b> tool beside the field to select attributes for display.
Filters	Specifies one or more filters to offer as radio buttons under the checkbox to select the collection in the Display Preferences dialog. Click the <b>Select</b> tool beside the field to open the Define Available Collection Filters dialog, enter a name for the filter and then click the ellipsis button in the <b>Filter Expression</b> column to define the parameters of the filter (see <i>Defining a Filter Expression</i> on page 116).
Mandatory	Specifies that the collection must be displayed on the symbol, and is not available for deselection in the Display Preferences dialog.
Limit number of lines	Enables a field in the Display Preferences dialog allowing the user to limit the display of collection members to the number that they enter.



Option	Description
Hide when empty	Specifies that the symbol compartment containing the collection is hidden when there is nothing to display.

### **Configuring the Display of Exclusive Choices**

An exclusive choice groups two or more attributes in the Display Preferences dialog, from which the user can choose to display one. To add an exclusive choice, click the **Add Exclusive Choice** tool, and drag attributes onto it.



Click on an exclusive choice in the list to set the following options:

Option	Description
Label	Specifies a label to use for the choice in the Display Preferences dialog.
Display	Specifies whether the choice displays as horizontal or vertical radio buttons or as a combo list.
Mandatory	Specifies that the choice must be displayed on the symbol, and is not available for deselection in the Display Preferences dialog.

## Importing and Exporting Model Graphics

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You can import graphics to and export graphics from your PowerDesigner models.

To import an image into PowerDesigner, select **Edit > Import Image** to open the Select Image window (see *Browsing for Images* on page 200), select an image and click **OK** to display it in the diagram. Imported images are saved in the model.

To export one or more symbols from PowerDesigner, select them in the diagram and then click **Edit > Export Image** to open a Save As dialog, select a format in the **Save As Type** list, enter the filename and click **OK**.

You can export symbols in any of the following file type formats:

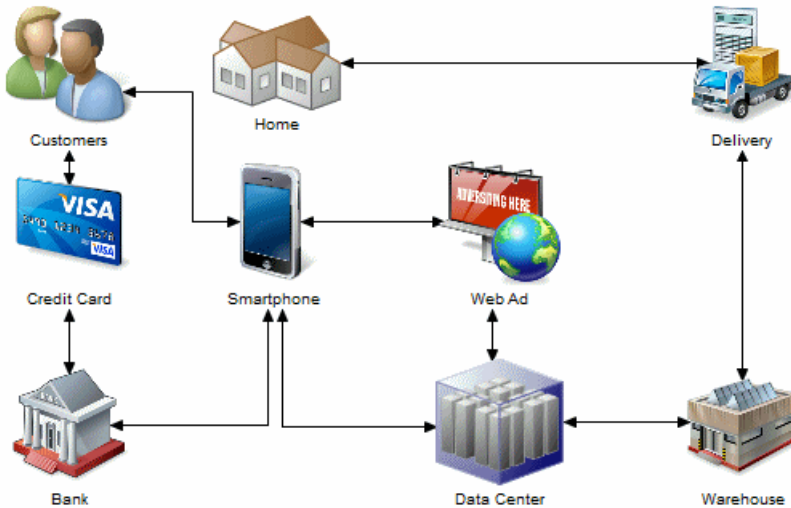
File type	Extension
Enhanced Metafile	EMF
Bitmap	BMP, DIB, RLE
JPEG Compliant	JPG, JPEG
Portable Network Graphic	PNG
Graphics Interchanged Format	GIF
Tagged Image File Format	TIF, TIFF
Scalable Vector Graphics	SVG

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**Note:** If you export symbols or cut or copy them to the Clipboard, you must select **Edit > Export in Color** to retain them in color.

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A *free model (FEM)* provides a context-free environment for modeling any kind of objects or systems. You can use it to sketch simple visualizations or create entirely new forms of model by defining your own concepts and graphical symbols through an extension file.



To create a new, empty FEM - Select **File > New Model**, and choose **Free Model**.

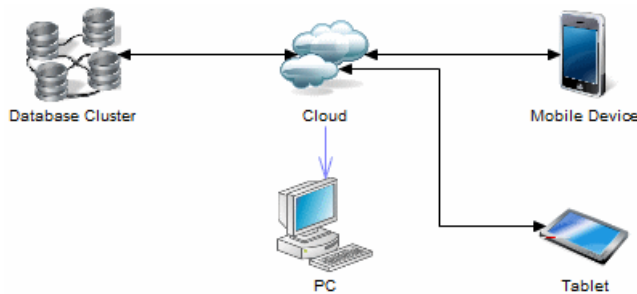
For information about extending objects from their property sheets, see *Extending Objects* on page 154. For detailed information about all the extension mechanisms available in PowerDesigner, see *Customizing and Extending PowerDesigner > Extension Files*.

## Sketching Objects with the Free Model

You can quickly sketch a visualization of any concepts by creating extended objects in a free model and giving them appropriate symbols.

1. [optional] Select **Tools > General Options** and select the **Edit in place after creation** tool to allow you to name objects immediately after creating them without opening their property sheets.
2. Select **File > New Model**, select **Free Model**, specify a model name, and click **OK**.
3. Use the **Extended Object** tool in the **Free Diagram** toolbox to create a basic object.

4. Right-click anywhere in the diagram to drop the tool and then right-click on your object and select **Change Image** to select a new image for the image (see *Browsing for Images* on page 200).
5. Create additional objects as necessary and link them as appropriate using the **Extended Link** tool.



## Creating New Types of Model with the Free Model

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You can define a set of extensions and attach them to a free model to model entirely new concepts.

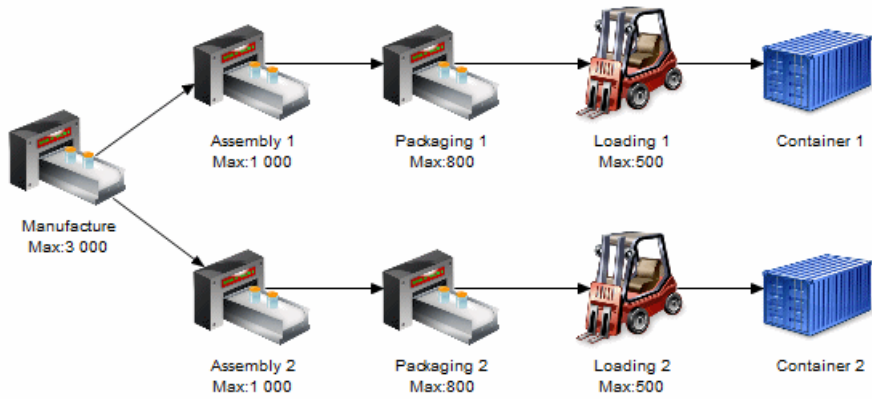
1. Select **Tools > Resources > Extensions > Free Models**.
2. Click the **New** button, enter an appropriate name, select to copy from the default template, and click **OK** to open your extension file in the resource editor.
3. Right-click the Profile category, select **Add Metaclasses**, click the **PdCommon** sub-tab, select the **ExtendedObject** metaclass, and click **OK**.
4. For each new concept that you want to define, right-click the **ExtendedObject** metaclass and select **New > Stereotype**, enter an appropriate name, and select the **Use as metaclass** and the **Toolbox custom tool** options.

Stereotypes with these options selected have their own object lists under the **Model** menu, their own Browser categories and a tool to create them in the Toolbox

5. Right-click a stereotype and define extended attributes (new properties) and other extensions under it as necessary.

For detailed information about working with extensions, see *Customizing and Extending PowerDesigner > Extension Files*.

6. To model with your extensions, select **File > New Model**, select **Free Model**, specify a model name, click the **Select Extensions** button, select your extension to attach it to the model, and click **OK**.
7. Begin modeling with your new concepts. You can, at any time, double-click your extension file in the **Extensions** category under your model in the Browser to modify your extensions.





## CHAPTER 7      Comparing and Merging Models

PowerDesigner provides powerful tools for comparing models and merging them.

### Comparing Models

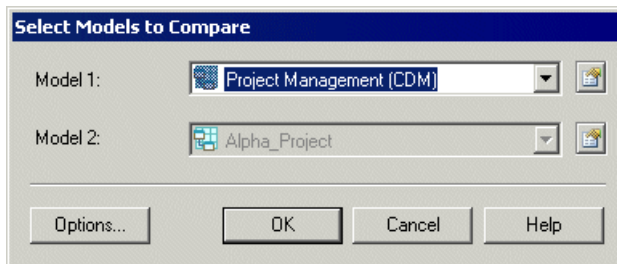
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You can compare the content of two PowerDesigner models or two resource files of the same type at any time. You may want to compare models or resource files to review evolutions in models or resources manipulated by different development teams or to evaluate the differences that exist between the models or resources before merging them.

1. Select **Tools > Compare Models** to open the Select Models to Compare dialog box.

The current model is displayed in the **Model 2** field.

2. Select a model to compare in the **Model 1** list. Only models of the same type in the workspace are available for comparison.



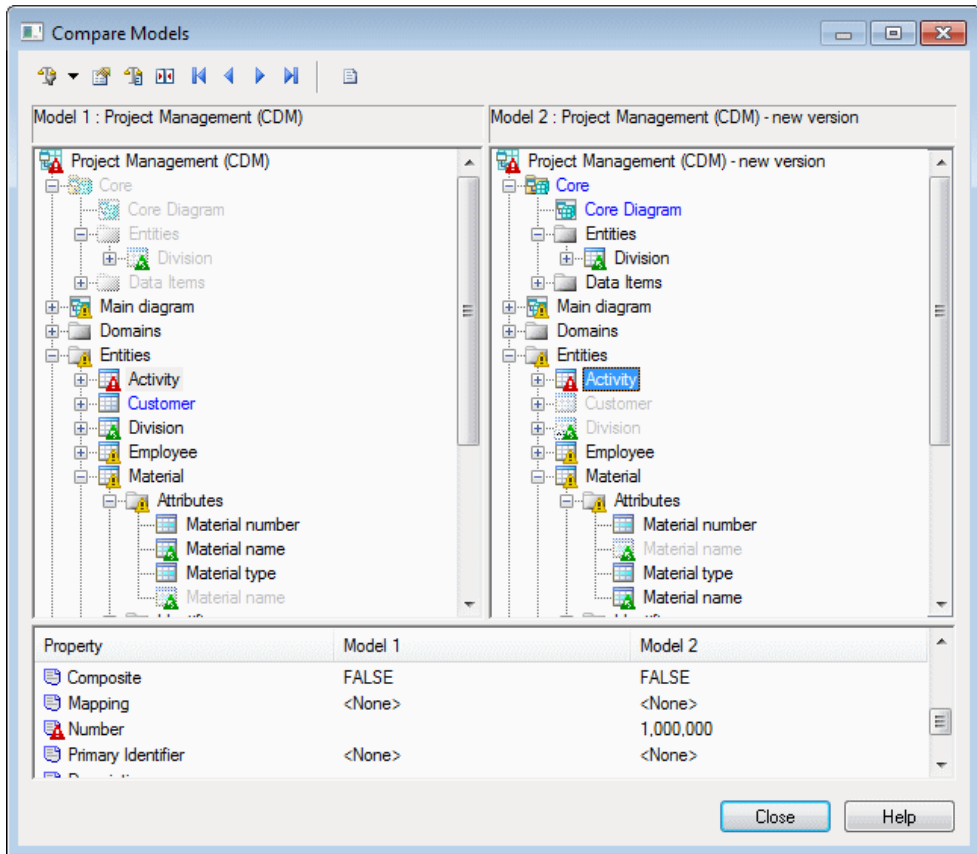
3. [optional] Click the **Options** button to open the Comparison Options window and specify which objects and properties you want to include in the comparison (see *Excluding Objects and Properties from a Compare or Merge* on page 230).
4. Click **OK** to open the Compare Models window, which displays the objects contained within the models or resource files in a tree format, and highlights the differences between them (see *Reviewing Differences when Comparing Models* on page 223). You can apply a filter to simplify the list of differences (see *Filtering Objects and Changes During a Compare or Merge* on page 232).

### Reviewing Differences when Comparing Models

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The Compare Models window displays the models to compare as two trees of objects in left and right panes (with the model from which you launch the comparison on the right), and a third pane at the bottom with three columns, listing each of the properties of the selected object, and the values assigned to these properties in the two models.

# CHAPTER 7: Comparing and Merging Models



















Explore the tree by opening nodes to reveal categories, objects, and sub-objects. To expand all nodes, press the numpad star (\*). To collapse all nodes, press the numpad minus sign (-).







The following types of differences can be detected during a comparison:


Symbol	Description
	<b>Existence</b> - The object is present in one model (blue text) and absent in the other (greyed text and icon).



Symbol	Description									
<div><div> Activity</div><div> Activity</div></div> <p>Properties pane:</p> <table><thead><tr><th>Property</th><th>Model 1</th><th>Model 2</th></tr></thead><tbody><tr><td> Mapping</td><td>&lt;None&gt;</td><td>&lt;None&gt;</td></tr><tr><td> Number</td><td>1,000,000</td><td>100,000</td></tr></tbody></table>	Property	Model 1	Model 2	 Mapping	<None>	<None>	 Number	1,000,000	100,000	<p><b>Modification</b> (red warning triangle) - One or more attributes of the object has different values in each of the models. To review the differences in properties, look for the red warning triangles in the list of properties in the bottom pane.</p> <hr/> <p><b>Note:</b> To open the property sheet of any object in either model, right-click it in the tree and select <b>Properties</b>.</p> <hr/>
Property	Model 1	Model 2								
 Mapping	<None>	<None>								
 Number	1,000,000	100,000								
<div><div> Employee</div><div> Employee</div></div>	<p><b>Child Modification</b> (yellow warning triangle) - One or more sub-objects beneath the object has differences.</p>									
<div><div> Material name</div><div> Material type</div><div> Material name</div></div> <div><div> Material name</div><div> Material type</div><div> Material name</div></div>	<p><b>Movement</b> (green triangle with arrow) - The object is in a different position in the collection or in a different package. The normal icon and text represent the object's position in the present model and the greyed text and icon represent its position in the other model. The green triangle becomes red if the object also has modifications.</p> <hr/> <p><b>Note:</b> To go to the other instance of the object, right-click it in the tree and select either <b>Next Occurrence</b> or <b>Previous Occurrence</b>.</p> <hr/>									

The following tools are available in this window:

Tool	Description
	<b>Filter</b> - Apply one or more of the predefined filters to control the types of differences that are displayed (see <i>Filtering Objects and Changes During a Compare or Merge</i> on page 232).
	<b>Properties</b> - Open the property sheet of the selected object.
	<b>Options</b> - Open the Comparison Options dialog to control the types of metaclasses, attributes, and collections that are displayed (see <i>Excluding Objects and Properties from a Compare or Merge</i> on page 230).
	<b>Manually Synchronize Two Objects</b> - Select an object in either model and then click this tool to link it to an object in the other model or to break such a link (see <i>Repairing or Breaking Links Between Objects</i> on page 232).
	<b>First/Last Difference</b> - Jump to the first or last difference in the tree.
	<b>Previous/Next Difference</b> - Jump to the previous or next difference in the tree.

Tool	Description
	<b>Compare Preview</b> - Open the Compare Preview window, which gives a list of the differences in textual or list formats (see <i>Previewing, Printing, and Saving Comparison Results</i> on page 233).

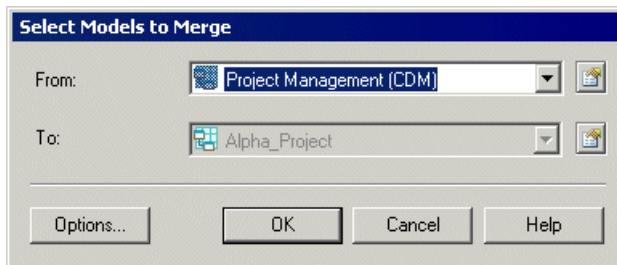
## Merging Models

You can merge the content of two PowerDesigner models or two resource files of the same type at any time.

1. Select **Tools > Merge Models** to open the Select Models to Merge dialog.

The current model is displayed in the **To** field.

2. Select a model to merge in the **From** list. Only models of the same type in the workspace are available for merging.



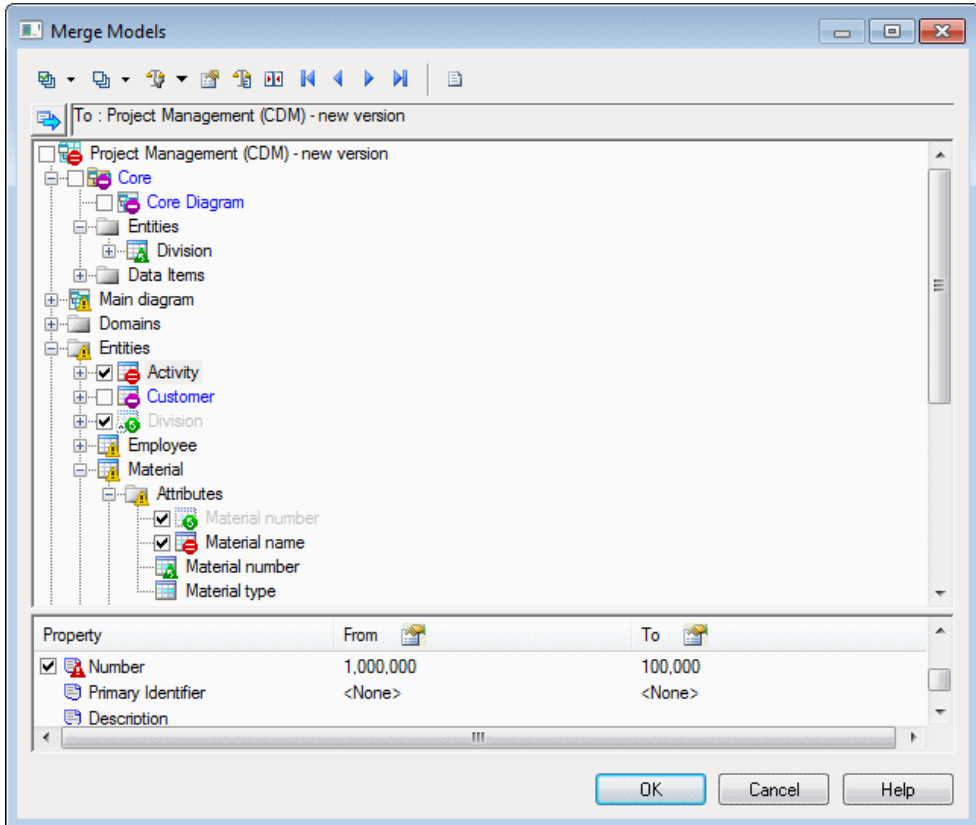
**Note:** If you want to merge two PDMs, BPMs, OOMs or XSMs, you have to select two models with the same target DBMS or language.

3. [optional] Click the **Options** button to open the Comparison Options dialog and specify which objects and properties you want to include in the comparison and possible merging (see *Excluding Objects and Properties from a Compare or Merge* on page 230).
4. Click OK to open the Merge Models window, which displays the objects contained within the models or resource files in a tree format, and highlights the differences between them (see *Selecting Merge Actions* on page 226). You can apply a filter to simplify the list of differences (see *Filtering Objects and Changes During a Compare or Merge* on page 232).
5. Selecting the merge actions that you want to perform, and then click **OK**.  
The Merge Models dialog box closes and the merge begins, with messages displayed in the **Output** pane. A final message informs you that the models were successfully merged.

## Selecting Merge Actions


The Merge Models window displays the anticipated result of your proposed merge as a tree of objects, with check boxes to the left of each potential change to allow you to approve or reject it. The properties pane lists each of the properties of the selected object, and allows you to



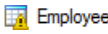

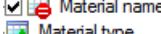
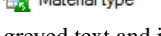
select or reject the values proposed in the To column. Select or deselect actions as appropriate and then click **OK** to perform the merge.



Explore the tree by opening nodes to reveal categories, objects, and sub-objects. To expand all nodes, press the numpad star (\*). To collapse all nodes, press the numpad minus sign (-). Use the **Show/Hide Source Model** toggle at the top left of the pane to split the pane and display the source model to the left of the target model.

The following types of merge actions can be approved by selecting or rejected by deselecting the check box:










Symbol	Description
<input checked="" type="checkbox"/>  <b>Core Diagram</b> (blue plus sign and greyed text and icon)	<b>Creation</b> - The object is absent from the model to be modified and present in the model to apply. Selected: The object will be created.

Symbol	Description									
 Customer (purple minus sign and blue text)	<b>Deletion</b> - The object is present in the model to be modified and absent in the model to apply.  Selected: The object will be deleted.									
 Activity (red equals sign)  Properties pane: <table><tr><th>Property</th><th>From</th><th>To</th></tr><tr><td>Mapping</td><td>&lt;None&gt;</td><td>&lt;None&gt;</td></tr><tr><td>Number</td><td>1,000,000</td><td>100,000</td></tr></table> (red warning triangle)	Property	From	To	Mapping	<None>	<None>	Number	1,000,000	100,000	<b>Modification</b> - One or more attributes of the object has different values in each of the models. To review the differences in properties, look for the red warning triangles in the list of properties in the bottom pane.  <b>Note:</b> Double-click a property to display differences in textual format between models. The value to be applied is in blue, preceded by >>, and the value to be deleted is in red preceded by <<.  Selected (object): All values in the model to be applied are copied to the model to be modified.  Selected (property): The value in the From column is applied to the model to be modified.
Property	From	To								
Mapping	<None>	<None>								
Number	1,000,000	100,000								
 Employee (yellow warning triangle)	<b>Child Modification</b> - One or more sub-objects beneath the object has differences. Expand the tree beneath the object to review and approve these changes.									
 Material type  Material name  Material type (green circle with arrow and greyed text and icon and green triangle with arrow)	<b>Movement</b> - The object is in one position in the model to be modified (green circle with arrow and greyed text and icon) and in a different position in the collection or in a different package in the model to be applied (green triangle with arrow). The green triangle becomes red if the object also has modifications.  Selected: The object is moved from the position with the green circle to the position with the green triangle.  <b>Note:</b> To go to the other instance of the object, right-click it in the tree and select either <b>Next Occurrence</b> or <b>Previous Occurrence</b> .									

By default, merge actions are selected as follows:

- During merge of unrelated models - all creation, modification and move actions are selected, but deletion actions are deselected to preserve the superset of all objects in the two models as far as possible.
- During check in/check out from the repository - based on when the latest changes were saved in the model.
- When updating a generated model - based on whether changes have been made to the generated model (if the **Preserve modifications** generation option is selected).

The following tools are available in this window:

Tool	Description
 	<b>Select/Deselect All</b> - Select or deselect all merge actions. Click the arrow to the right of the button to select or deselect all creation, deletion, modification, or move actions.
	<b>Filter</b> - Apply one or more of the predefined filters to control the types of merge actions that are displayed (see <i>Filtering Objects and Changes During a Compare or Merge</i> on page 232). <hr/> <b>Note:</b> The filters control only what is displayed in this window. Even if an action is not displayed, if it is selected, it will be applied when you click <b>OK</b> .
	<b>Properties</b> - Open the property sheet of the selected object.
	<b>Options</b> - Open the Comparison Options dialog to control the types of metaclasses, attributes, and collections that are displayed (see <i>Excluding Objects and Properties from a Compare or Merge</i> on page 230). <hr/> <b>Note:</b> The options control whether merge actions will be applied to objects. If you exclude a metaclass, attribute, or collection, then it will not appear in the window, and no merge actions will be applied to it.
	<b>Manually Synchronize Two Objects</b> - Select an object in either model and then click this tool to link it to an object in the other model or to break such a link (see <i>Repairing or Breaking Links Between Objects</i> on page 232).
	<b>First/Last Difference</b> - Jump to the first or last difference in the tree.
	<b>Previous/Next Difference</b> - Jump to the previous or next difference in the tree.
	<b>Merge Preview</b> - Open the Merge Preview window, which gives a list of the differences in textual or list formats (see <i>Previewing, Printing, and Saving Comparison Results</i> on page 233).

## Excluding Objects and Properties from a Compare or Merge

You can control what types of objects will appear in the comparison or merge window along with the attributes and collections to compare for them through the Comparison Options dialog. By default, all objects and properties are selected.

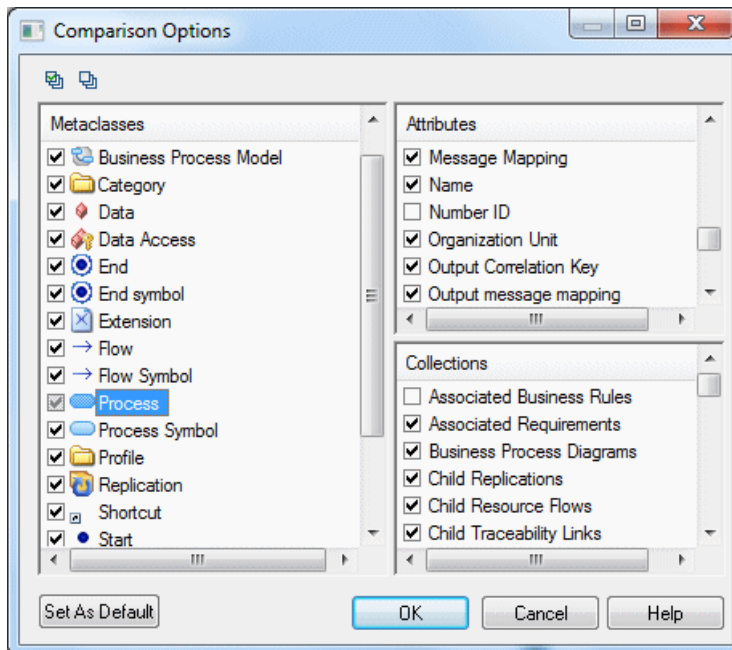
**Note:** When merging models, differences between the two models that concern deselected metaclasses, attributes, or collections are disregarded, and will not be merged.

1. Click the **Options** button in the **Select Models to Compare/Merge** or the **Compare/Merge Models** window.

The **Comparison Options** dialog lists **Metaclasses** in the left pane, and the **Attributes** and **Collections** of the selected metaclass in the two right panes.

2. To exclude an attribute or collection from comparison, click on the name of the metaclass in the left pane and then deselect the appropriate check boxes in the right panes.

For example, to exclude the `Number ID` attribute and `Associated Business Rules` collection under the `Process` metaclass from comparison, click on the `Process` metaclass name, and then deselect the relevant check boxes:



Metaclasses with one or more attributes or collections deselected have their check box greyed.

To exclude the same attribute or collection from every metaclass where it appears, right click it and select **Deselect for All Metaclasses**.

You can select multiple metaclasses at once using the CTRL or SHIFT keys, in which case only the attributes and collections available under all the selected metaclasses are displayed in the right panes.

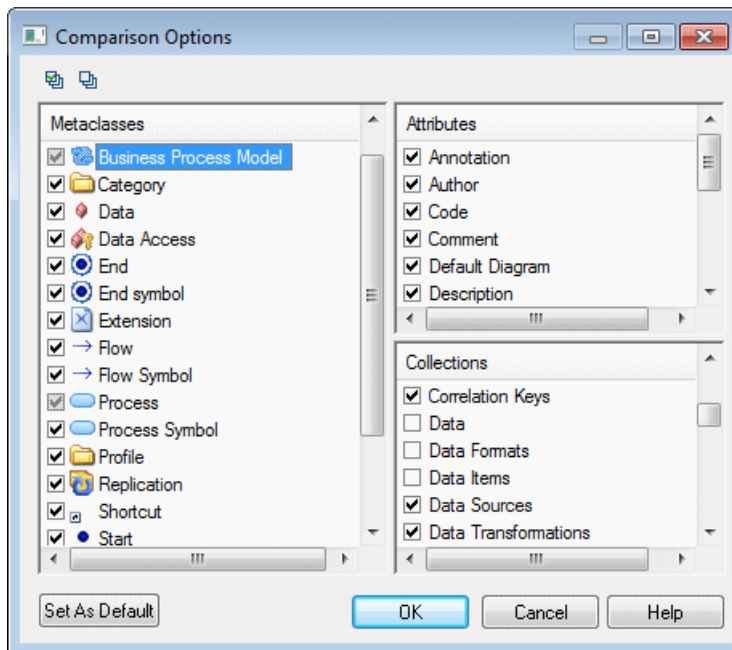
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**Note:** To exclude all the properties (attributes and collections) of a metaclass from comparison, deselect its check box in the **Metaclasses** list. Doing so will only exclude any changes in properties from comparison, but will not exclude the metaclass itself and will leave any creations or deletions to be detected.

---

3. To exclude a metaclass from comparison (both modifications of properties and creations and deletions), click on the model metaclass name, and then deselect the check box of the appropriate collection.

For example, in a BPM, to exclude the Data, Data Formats, and Data Items collections from comparison, click on the Business Process Model metaclass, and then deselect these collections:



To ensure that these metaclasses will not be considered, even if objects appear under a package, right-click each collection and select **Deselect for All Metaclasses**.

4. [optional] Click the **Set as Default** button to save your exclusions as the default for future comparisons or merges for this type of model.
5. Click **OK** to return to your comparison or merge dialog.

## Filtering Objects and Changes During a Compare or Merge

---

Click the arrow next to the **Filter** tool in the Compare or Merge window to select a filter to apply to the object trees and display only certain types of changes, conflicts or, any combination thereof.

The following filters are available:

- **All Objects** - [default] Remove all filters.
- **All Changes** - Show only objects that have some difference.
- **Only Created Objects** - Show only objects that will be created during a merge (or that are absent from Model 2 in a comparison).
- **Only Deleted Objects** - Show only objects that will be deleted during a merge (or that are absent from Model 1 in a comparison).
- **Only Modified Objects** - Show only objects that have differences between attribute values
- **Only Moved Objects** - Show only objects that have moved in a collection or to another package or parent. In the Advanced Filters dialog, you can distinguish between:
  - **Show Moved Objects (Parent Change)** - When moving to a new parent, package, or collection
  - **Show Changes of Position with Collection** - When remaining in the same parent, package, or collection. For example, when you change the order of attributes within the same entity.
- **Only Identical Objects** - Show only objects that have no changes.
- **Only Selected Objects** - [merge only] Show only objects that have merge actions selected.
- **Only Conflicts** - [repository and generation merge only] Show only objects that have conflicting modifications in both models A merge conflict occurs when the same object has been modified differently in the origin and generated model or the local and Repository model.
- **Hide All Preservations** - [generation merge only] Show only changes made in the origin model since the last generation.
- **Advanced Filters** – Opens the Comparison Filters dialog, which allows you to combine several filters

## Repairing or Breaking Links Between Objects

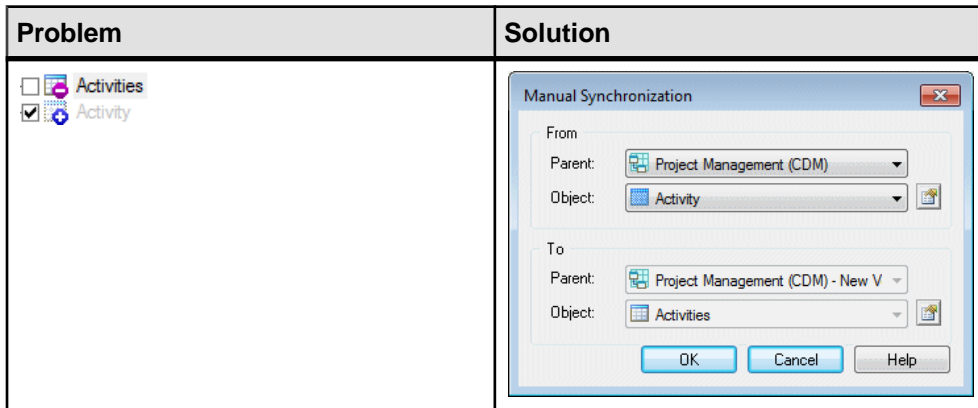
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Sometimes, when an object has been renamed or modified outside PowerDesigner, its link with the corresponding object in another model may be lost, and the two objects are shown independently, with a creation and a suppression in each model tree. You can manually repair the link between the objects or, in rare cases, break a link between objects that you do not want to compare or merge.



Select the item for which you want to repair or break the link, click the **Manually Synchronize Two Objects** tool, and select the object with which to pair it in the **From** or **To** box as appropriate.

For example, if the **Activities** entity in your model needs to be link to the **Activity** entity in the other model:



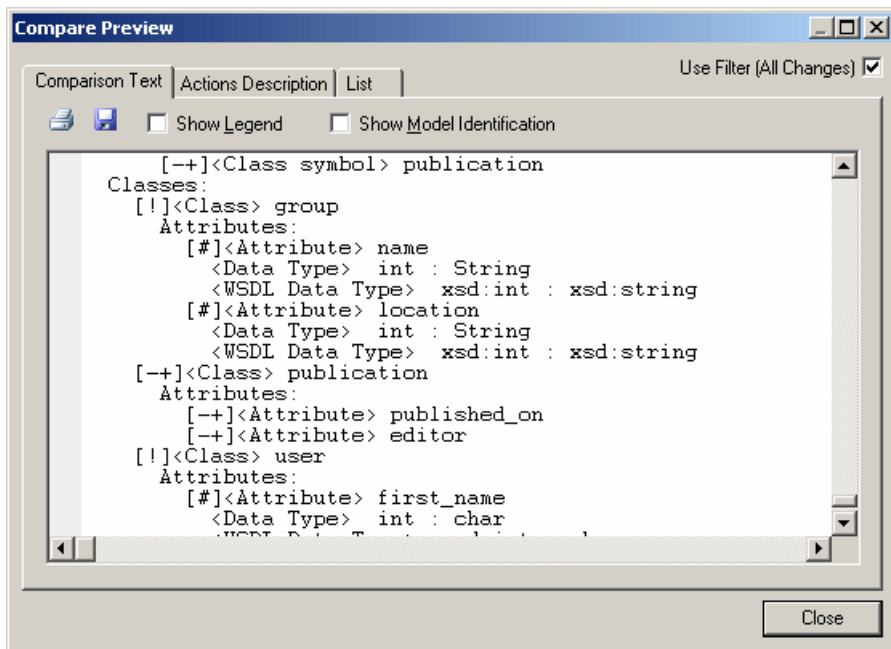
**Note:** To break a comparison link, select an object that is linked to an object in the other model, click the tool, and select **None** in the other field.

## Previewing, Printing, and Saving Comparison Results

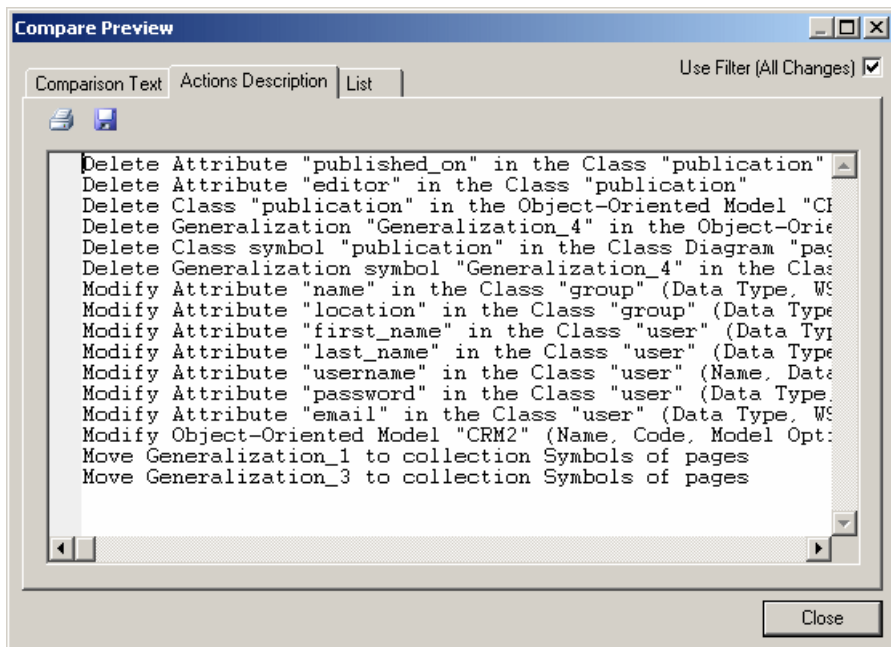
You can preview, save, and export the results of the comparison by clicking the Compare Preview tool to launch the Compare Preview window.

This window provides three formats viewing the comparison results on the following tabs:

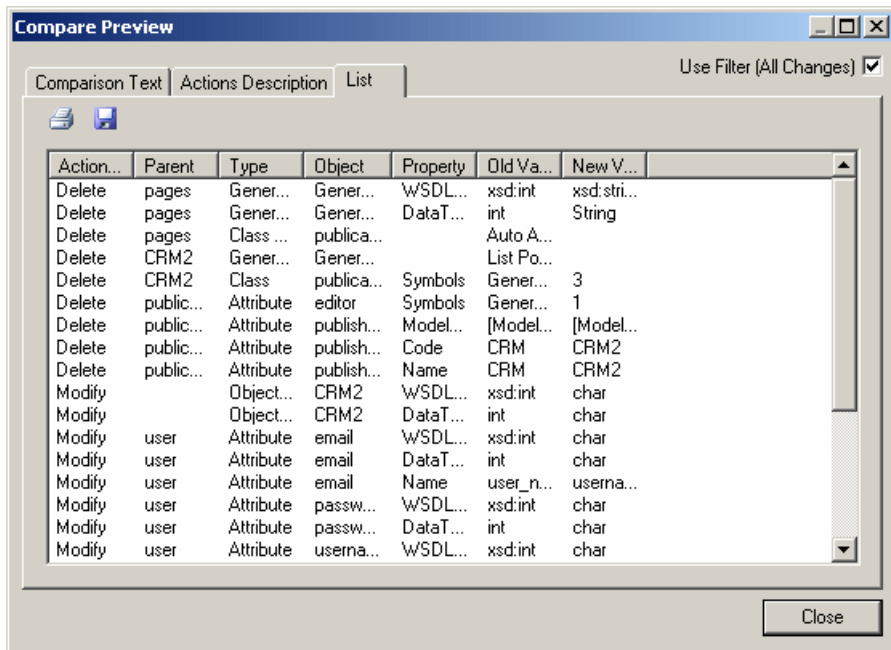
- *Comparison Text*—a textual representation of the differences between the models. This is the most exhaustive format, and provides complete information about the whole object tree. Select the Show Legend and/or Show Model Identification options to display additional information at the beginning of the text.





- *Actions Description*—a list of the actions that would need to be taken to render the models the same. This will often be the most readable format as it represents each change in the form of a sentence:



- *List* – a columnar representation of the required actions. This format is the most easily manipulated. You can sort by any of the columns, and export the list in a variety of formats to allow for various kinds of transformation:



The following tools are available on each of the tabs:

Tool	Description
Use Filter	Filters the changes using the filter specified in the main window (see <i>Filtering Objects and Changes During a Compare or Merge</i> on page 232). If no filter has been specified before the preview is launched, then this option is not visible.
	Print
	Save - Saves the comparison in text format for Comparison Text and Actions Description , and in XML, CSV, RTF, or HTML format for List.

The following columns appear on the List tab:

## CHAPTER 7: Comparing and Merging Models

Column	Description
Action Type	Specifies the type of action to perform. Can be any of the following: <ul style="list-style-type: none"><li>• Create – creates an object</li><li>• Delete – deletes an object</li><li>• Modify – modifies an object</li><li>• Move Object – moves an object to a new parent</li><li>• Col Insert – inserts an object into a collection</li><li>• Col Remove – removes an object from a collection</li><li>• Col Move – moves an object from one position to another within a collection</li></ul>
Parent	Specifies the parent of the object to be changed (the original parent, in the case of an object that will be moved). For example, a class for an operation, or a diagram for a symbol.
Type	Specifies the type of the object to be changed.
Object	Specifies the name of the object to be changed
Property	Specifies the object property or collection to be changed. Empty for a Create, Delete, or Move Object action.
Old Value	Specifies the original value of the property to be changed. Empty in the case of a Create or Col Insert
New Value	Specifies the updated value of the property. Empty in the case of a Delete or Col Remove.

For example, changing the datatype of attribute MyVariable from int to long would yield the following column entries:

Action Type	Parent	Type	Object	Property	Old Value	New Value
Modify	MyClass	Attribute	MyVariable	DataType	int	long

## The PowerDesigner Plugin for Eclipse

During your installation of PowerDesigner, you can choose to install a plugin to allow you to use PowerDesigner within your Eclipse environment. The PowerDesigner plugin for Eclipse is available for Eclipse v3.2 to v4.3.

The PowerDesigner plugin for Eclipse has the following limitations:

- You cannot use the Copy/Paste/Rename features available in the Eclipse contextual menu for PowerDesigner resources.
- In the standalone PowerDesigner application, you can modify the source code of a class or interface from its property sheet Preview tab. This feature is not available in the plugin for Eclipse.
- You cannot export an Eclipse project containing PowerDesigner resources. If you want to export a project, you must deselect any PowerDesigner resources on the File system page of the Export wizard or the export will fail.

---

**Note:** The PowerDesigner plugin for Sybase Workspace, which is called Enterprise Modeling, includes all the features of the standard PowerDesigner plugin for Eclipse. When modeling within the Sybase Workspace environment, we recommend that you use the Enterprise Modeling perspective.

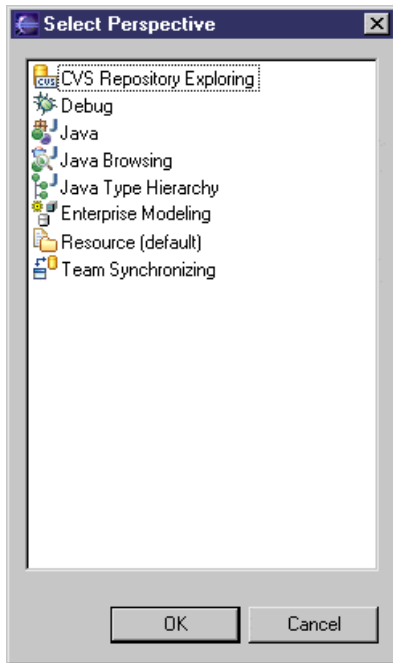
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### Activating the PowerDesigner Perspective

---

Click the title bar of a view to make it active. (The title bar turns blue). The name of the active perspective is shown in the title bar of the window and its icon is pushed-in in the shortcut bar. We recommend you use the PowerDesigner perspective.

1. Click the Open a Perspective icon in the shortcut bar and select Other, or select **Window > Open Perspective > Other**, to open the Select Perspective dialog box:



2. Select PowerDesigner in the list of perspectives, and then click **OK** to display the PowerDesigner perspective in the workbench window. The PowerDesigner perspective contains the following components:
  - *Model Explorer* – Equivalent to the standard PowerDesigner Browser. Allows you to manage the objects you use to perform a modeling task. It displays your models and the objects belonging to them in a tree view, and allows you to rapidly navigate between them. The Model Explorer also has a tab that gives you access to a PowerDesigner repository, where you can store all your models and associated files.
  - *Navigator* - displays a tree view of all the resource files attached to Eclipse projects open in the workbench window. These resource files can be model files, diagram files, source code files, specification files, or any type of file. You can use the Navigator to open models, create new projects and models, or even open object property sheets.
  - *Editor Area* – Equivalent to the standard PowerDesigner canvas. The primary pane that displays your present model diagram or report outline.
  - *Modeling Output* - shows the progress of any PowerDesigner process, such as checking a model or generating or reverse engineering a database.
  - *Modeling Result List* - displays the results of a search or a model check.

---

**Note:** Once you have activated the PowerDesigner perspective, an icon to switch to it is displayed in the shortcut bar. You can use the **Window** menu to open, customize, and reset this and other perspectives.

---

## **Manually Activating PowerDesigner Toolbars**

Specific toolbars are available in the PowerDesigner perspective. If they do not appear, you can activate them manually.

1. Select **Window > Customize Perspective** or right-click the toolbar section and select **Customize Perspective** in the contextual menu, to open the Customize Perspective dialog box.
2. Select the **Shortcuts** tab, and:
  - Select **New** in the **Submenus** list, then select **PowerDesigner** in the **Shortcut Categories** list, and select **Model** and **Modeling Project** in the **Shortcuts** list.
  - Select **Open Perspective** in the **Submenus** list, and select **PowerDesigner** in the **Shortcuts** list.
  - Select **Show View** in the **Submenus** list, then select **PowerDesigner** in the **Shortcut Categories** list, and select **Model Explorer**, **Modeling Output**, **Modeling Result List**, and **Tool Palette** in the **Shortcuts** list.
3. Select the **Toolbar Visibility** tab, and select **PowerDesigner Diagram**, **PowerDesigner Standard** and **PowerDesigner View** in the **Tool Bar Structure** list.
4. Click **OK**.

The PowerDesigner toolbars that are common to all PowerDesigner modules appear. Additional, module-specific toolbars will appear automatically when you open or create a model.

## **Setting PowerDesigner Eclipse Preferences**

The PowerDesigner plugin for Eclipse provides options to customize your environment.

1. In Eclipse, select **Window > Preferences** to open the Preferences dialog.
2. Select **Sybase, Inc > PowerDesigner** or **Enterprise Modeling** and set preferences as appropriate:

Preference	Description
Close diagram editors on exit	By default, when you restart Eclipse, any diagrams that were previously open will be automatically reloaded. Select this option to prevent reloading.
Flag diagram editor as dirty if parent model requires save	Select this option if you want to be reminded that a model has been modified before you save the changes.
Automatically merge models on code-to-model synchronization	Select this option if you want the merge process to be silent during reverse engineering.

### 3. Click **OK**.

For information about the standard PowerDesigner options and preferences, see *Chapter 9, Customizing Your Modeling Environment* on page 249.

## Creating a Modeling Project in Eclipse

---

You can create a modeling project in Eclipse to group together all your models and other resources.

1. Select **File > New > Project** to open the New Project window:
2. Select **PowerDesigner > Modeling Project** in the list of Wizards and click Next to open the PowerDesigner New Project window.
3. Specify the project name and location, and select the type of PowerDesigner project to create. PowerDesigner project templates allow you to create projects that are already populated with models and/or that contain matrices that help you to follow various modeling frameworks, such as FEAF.
4. Click OK to create the project.

For detailed information about working with projects, see *Chapter 3, Projects and Frameworks* on page 47.

## Creating a Model in Eclipse

---

A model is the basic work unit in PowerDesigner. Every model is contained within a project, and contains at least one diagram and any number of other objects. Though a model may be split into packages for organizational reasons or may contain several diagrams, it remains the fundamental basis for your modeling work.

1. Select **File > New > Model** to open the New Model dialog box.
2. Select a model type and specify whether you want to create an empty model or one based on a template, then click **Next** to go to the Destination Container page.
3. Select a project or project folder in which to create the model. Use the buttons to create a project (see *Creating a Modeling Project in Eclipse* on page 240) or folder if necessary, and then click **Next** to go to the Model Definitions page.
4. Enter a name for your model and (for BPM, PDM, OOM, and XSM) select the target of the model. Depending on the type of model, you may also need to specify the first diagram to create.
5. Click **Next** to go to the Extensions page, and select any extension files that you want to attach to the new model.



6. Click **Finish** to create the model in your project in the Model Explorer, and open its default diagram in the editor area.

## Importing an Existing Model into Eclipse

---

To open an existing model you have to import it into Eclipse.

1. Select **File > Import** to open the Import dialog box.
2. Select Model in the list and click Next.
3. Type a model filename in the corresponding box or click the Browse button to select a model from a selection dialog box.
4. Select the Create a linked resource check box if you want to associate the model to the current project without copying the file to the project location.
5. Select an existing project or create a new project where to open the existing model and click Finish.

The model default diagram is displayed in the Editor area.

## Generating an Eclipse Java Project from an OOM

---

You can model the structure of your Java application (including EJBs, Servlets, and JSPs) in a PowerDesigner OOM and then generate an Eclipse Java Project in which you will complete the implementation of the classes, and from which you will compile, package, deploy, and debug the application.

You can use the PowerDesigner plugin for Eclipse to enable round-trip engineering for Java development:

- Perform high level analysis and design using PowerDesigner
  - Design and create Java components in PowerDesigner
  - Generate an Eclipse Java project containing the following files:
    - A `.project` file - that defines the name of the project and the build commands
    - A `.classpath` file - that defines the source directory, the binary directory and the list of libraries
    - Source files and other files
    - A `build.xml` for Ant build script - to specify the necessary build tasks and libraries.
  - Finish the implementation of Java classes within the generated Eclipse project
  - Compile, package, deploy and debug the application
  - Reverse engineer the final Java code to synchronize the PowerDesigner model
1. Select **Tools > General Options** and click the Variables category, then add the following variables if they are not already present:

- `ECLIPSE_HOME` - your Eclipse home directory
  - `J2EE_HOME` - your J2EE SDK home directory
  - `JWSDP_HOME` - [optional] your Java Web Service Developer Pack home directory
2. [optional] Preview the Eclipse `.project`, `.classpath` and `Ant build.xml` files by right-clicking the model node in the Browser and selecting **Properties**. Each of the files is available on its own sub-tab on the **Preview** tab of the property sheet.
  3. Select **Language > Generate Java Code** to open the Generation dialog.
  4. Enter the project folder where you want to generate the files in the **Directory** field. The name of this folder will be used as the project name.
  5. Verify that Eclipse is selected on the **Targets** tab.
  6. [optional] Click the **Selection** tab and specify the packages, classes and interfaces that you want to generate. By default, all objects are generated.
  7. Click the **Options** tab and review the generation options, including those that control the Eclipse version to generate for and whether to overwrite existing `.project` and `.classpath` files.
  8. [optional] Click the **Generated Files** tab and specify which files will be generated. By default, all files are generated
  9. Click **OK** to generate the Eclipse Java project.

If you are generating a new project from the PowerDesigner plugin for Eclipse, the project opens automatically.

When generating code for an existing project, you must refresh the project by right-clicking the project in the Eclipse Package Explorer and selecting **Refresh**.

If you have generated the Eclipse project from outside Eclipse, you will need to import the project into Eclipse by selecting **File > Import**.

---

## Synchronizing an OOM with Its Java Source

---

You can synchronize an Object Oriented Model (OOM) with its Java source code, so that each time you modify the model, a source code file is automatically created or updated, and when you modify and save a source code file, the changes appear in the model. Synchronization is only available for Java OOMs.

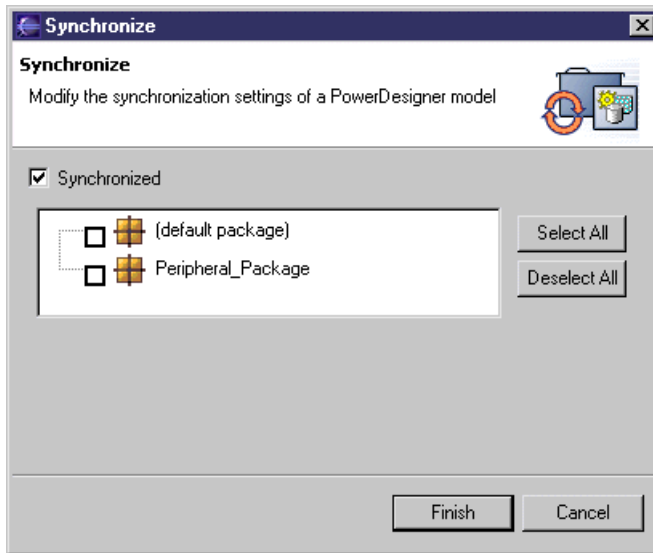
You can activate synchronization from the Model Explorer or Navigator. A model is synchronized per *package*.

---

**Note:** You can only synchronize each package with one set of source files and each set of source files with one package. If you try to synchronize a second model with a package, its check box is unavailable.

---

1. In the Model Explorer, right-click the model and select **Synchronize**, then select the **Synchronized** check box:



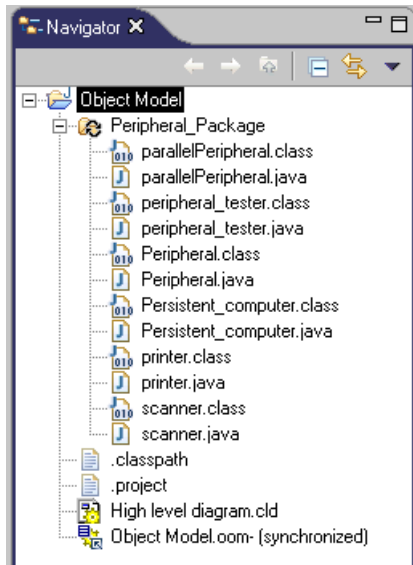

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**Note:** You can, alternatively, enable synchronization from the Navigator by right-clicking the model, selecting **Properties**, selecting **PowerDesigner** in the left pane and the **Synchronized** check box in the PowerDesigner page.

---

2. Select the packages you want to synchronize with their source code. The default package regroups all the objects at the root of the model.
3. Click **Finish**.

In the Navigator, the model bears a synchronized label, each synchronized package bears a synchronized symbol overlay, and a Java file (`.java`) and compiled file (`.class`) appear for each synchronized object:



You can double-click a Java or compiled file, to display its source code in the Editor view.

### **Example: Modifying Attributes in a Synchronized Model**

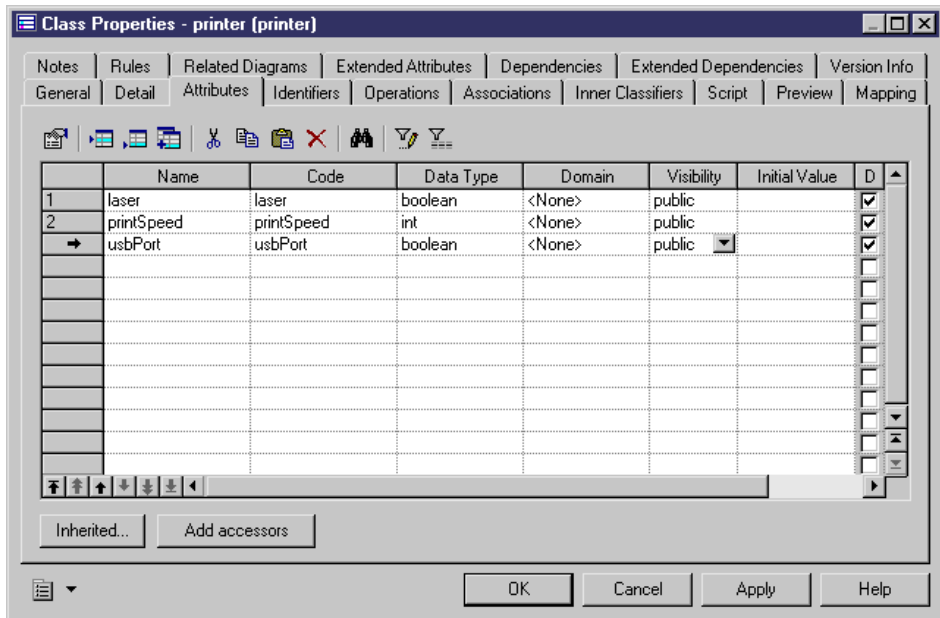
This example is developed from the example synchronized OOM, `demo.oom`, and demonstrates the creation and deletion of attributes in a synchronized model.

---

**Note:** If you change generation templates, you can regenerate source code manually by right-clicking a class, interface, synchronized package, or model, in the Model Explorer or in a class diagram, and selecting **Refresh Source Code**.

---

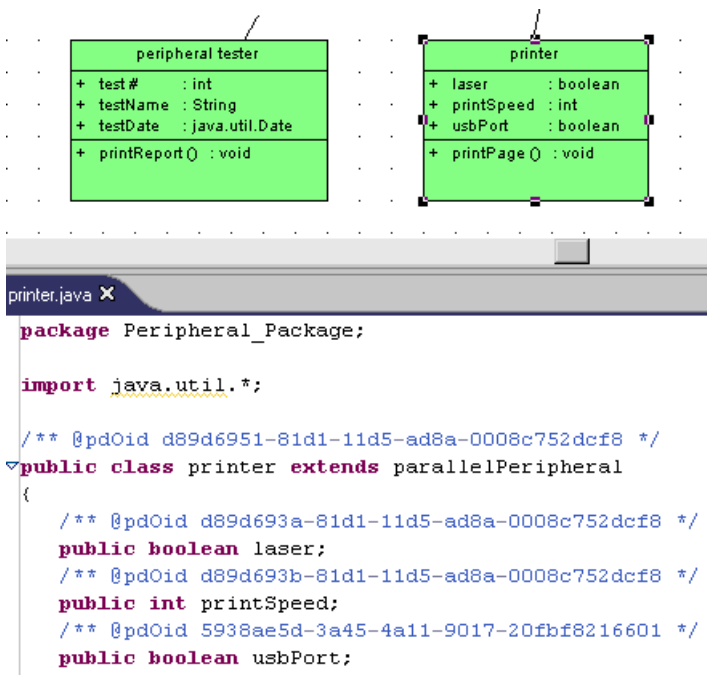
1. Open the property sheet of the `printer` class, click the **Attributes** tab, and add a `usbPort` attribute with a boolean data type and public visibility.



2. Click **OK** to return to the class diagram, where the `usbPort` attribute is displayed in the printer symbol:

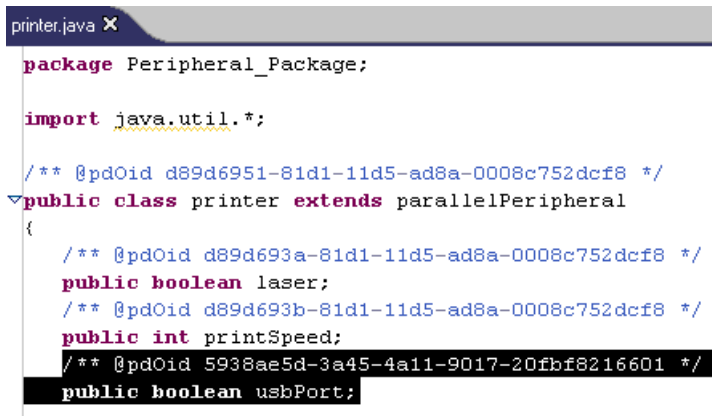
printer	
+ laser	: boolean
+ printSpeed	: int
+ usbPort	: boolean
+ printPage()	: void

3. Right-click the printer symbol or the printer item in the Model Explorer and select **Edit Source Code** to open the source code file of the printer class in a pane directly under the diagram:



Note that the `usbPort` attribute is displayed in the synchronized source code.

4. Delete the code concerning the `usbPort` attribute.



5. Select **File > Save** in the Eclipse menu bar.

The `usbPort` attribute disappears from the `printer` symbol because the `printer` class in the OOM has been synchronized with its source code.

printer	
+ laser	: boolean
+ printSpeed	: int
+ printPage()	: void

## Deactivating Synchronization

If you decide to deactivate synchronization, the model and its source code remain as they were after the last synchronization.

You can deactivate synchronization:

- In the Model Explorer, by right-clicking the model and selecting **Synchronize**, unselecting **Synchronized**, and clicking **Finish**.
- In the Navigator, by right-clicking the model and selecting **Properties**, unselecting **Synchronized** in the PowerDesigner page, and clicking **OK**.
- In the Navigator, right-clicking a synchronized package and selecting **Un synchronize**.

## Navigating Between an OOM and Its Java Source Code

Once you have synchronized an OOM with its Java source code, you can find its diagram symbols and open its property sheet from the Model Explorer, the Navigator, or source code files.

To locate an object symbol in a diagram:

- In the Navigator, right-click an object Java file and select **Find In Diagram**.
- In Outline view, select an object to automatically find in diagram.

---

**Note:** To open the Outline view, select **Window > Show View > Outline**.

---

- Double-click the name of an object in a source code file in order to select it, then right-click the object name and select **Find In Diagram**.

To open an object property sheet:

- In the Navigator, right-click an object Java file and select **Model Object Properties**.
- Double-click the name of an object in a source code file in order to select it, then right-click the object name and select **Model Object Properties**.





PowerDesigner is highly customizable. You can modify its interface to suit your work habits, set default naming conventions, change the appearance of object symbols, add new properties to objects, and even create your own types of objects.

---

**Note:** Administrators can prepare customizations to the PowerDesigner interface and push them to users (see *Chapter 20, Customizing the PowerDesigner Interface* on page 553).

---

## User Profiles

---

User profiles help you to standardize the look and feel of your models and to support standards by making groups of options and preferences portable for sharing and reuse across your organization. Various user profiles are provided with PowerDesigner, and you can create your own.

Various kinds of PowerDesigner options and preferences are stored in your model files and/or in your Windows registry. User profiles can contain default values for:

- Display Preferences – [model or registry] to control the color, shape, size, etc. of your diagram symbols and the information that is displayed upon them (see *Display Preferences* on page 206).
- Model Options – [model only] to control naming conventions (see *Naming Conventions* on page 143), case sensitivity, notation, default values, etc (see the appropriate modeling guide).
- General Options – [registry only] to control dialog preferences, environment variables, fonts, etc (see *General Options* on page 255).
- Other options – [registry only] such as the layout of toolbars and windows (see *Organizing Views* on page 268), favorite property tabs (see *Customizing a Property Sheet* on page 99), default columns for object lists (see *Customizing Object List Columns and Filtering Lists* on page 113), etc.

---

**Note:** An administrator can prepare customized preference profiles, which are made available to users on their first connection to the repository (see *Controlling Defaults for Options and Preferences* on page 566).

---

To view the list of user profiles, select **Tools > Resources > User Profiles**. For information about the tools available in resource file lists, see *PowerDesigner Resource Files* on page 272.

User profiles can contain any number of default preferences and options, the application of which is cumulative. Thus, if you apply a user profile that contains display preferences

specifying that PDM table symbols are by default red, and view symbols blue, and then apply a second user profile that sets tables by default to green, then table symbols will be green, and view symbols blue. You can, of course, override these default preferences and options locally in the model.

### Applying a User Profile

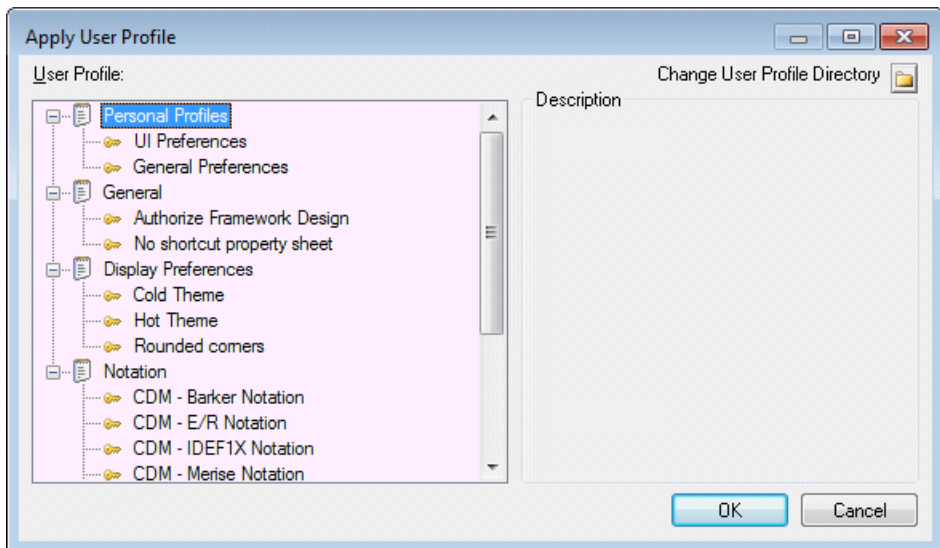
You can apply a user profile at any time. The defaults, preferences, and options contained within the profile will overwrite the existing values for those defaults, preferences and options, while leaving all others unchanged. Note that while general options take effect immediately, model options and display preferences only take effect when you create a new model.

---

**Note:** To return to a default user profile prepared for you by an administrator (see *Controlling Defaults for Options and Preferences* on page 566), select the **General Preferences** entry in the **Personal Profiles** category. To return to your default UI profile, select the **UI Preferences** entry.

---

1. Select **Tools > Apply User Profile** to open the Apply User Profile dialog:



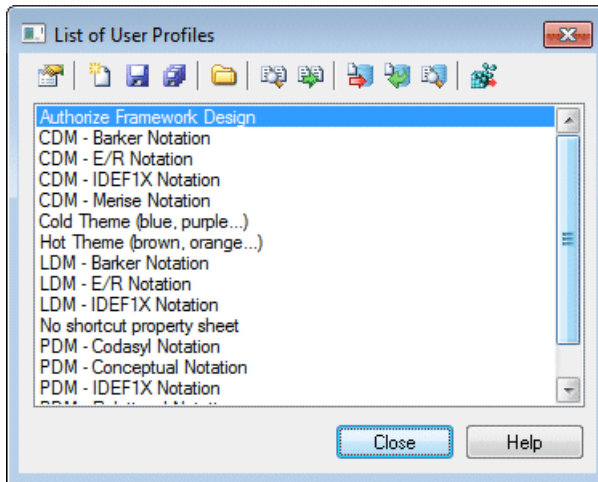
2. [optional] Click the **Change User Profile Directory** button, and browse to a folder where you have saved user profiles. By default they are saved in the `install_dir/Resource Files/Profiles` directory.
3. Select a profile from the list and click **OK**.

The user profile is applied, and overwrites the defaults, preferences, and options contained within it with the values it defines.










## Creating a User Profile



You can create a user profile by copying an existing profile, or by copying values from an open model or from your registry.

1. Select **Tools > Resources > User Profiles** to open the List of User Profiles:

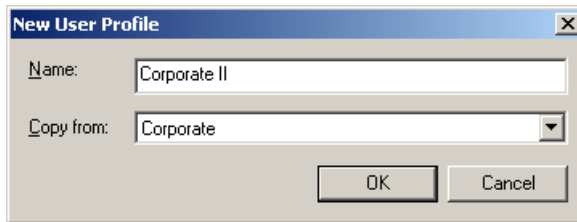


The following tools are available above the list:

Tool	Description
	Properties – opens the selected profile in the resource editor.
	New – creates a new profile.
	Save – saves the selected profile.
	Save All – saves all the profiles.
	Path – Specifies a directory from which to populate the list.
	Compare – Opens the Compare window to compare the structure of two profiles.
	Merge – Updates the selected profile by merging preferences from another profile, a model, or the registry (see <i>Updating a User Profile</i> on page 252).
	Check In - [if the repository is installed] Checks the selected resource file into the repository. For information about storing your resource files in the repository, see <i>Sharing Resource Files via the Library</i> on page 551.
	Update from Repository - [if the repository is installed] Checks out a version of the selected file from the repository to your local machine.

Tool	Description
	Compare with Repository - [if the repository is installed] Compares the selected file with a resource file stored in the repository.
	Apply to Registry – Applies the selected profile to your registry, overwriting your previous defaults and preferences. This has the same effect as selecting <b>Tools &gt; Apply User Profile</b> (see <i>Applying a User Profile</i> on page 250).

- Click **New** to open the New User Profile dialog:



- Enter a name for your profile and select a source from which to copy from. You can choose between:
  - Another user profile – makes a copy of the existing profile.
  - <Registry> - copies all your PowerDesigner defaults from your Windows registry.
  - <Model> - opens the Model for User Profile dialog which allows you to specify the preferences to copy from an open model (see *Copying Preferences from a Model* on page 253).
- Specify a name and a location to create the profile and click **Save**.

The user profile is created and opened for review in the resource editor.

### Updating a User Profile

You can update a user profile by copying values from an existing profile, from an open model, or from the registry.

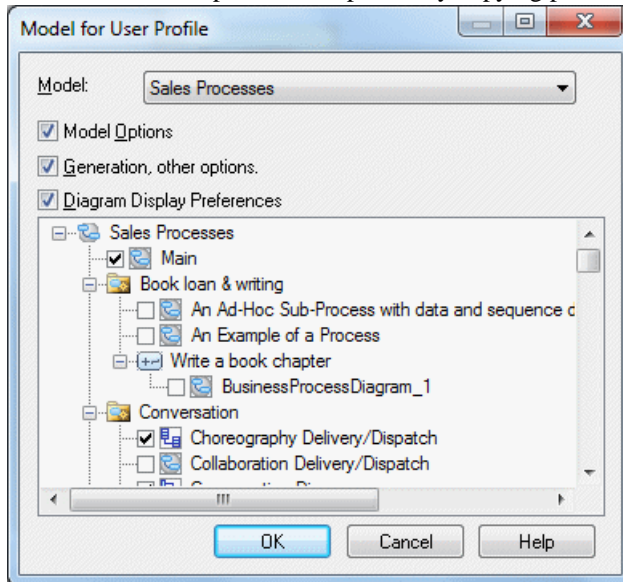
- Select **Tools > Resources > User Profiles** to open the List of User Profiles, select the profile to update and click the Merge tool to open the Select User profiles to Merge dialog.
- In the From field, select a source from which to copy from. You can choose between:
  - Another user profile
  - <Registry> - copies all your PowerDesigner defaults from your Windows registry. Note that model check options and generation options are not stored in the registry and can only be extracted from a model or another user profile.
  - <Model> - opens the Model for User Profile dialog which allows you to specify the preferences to copy from an open model (see *Copying Preferences from a Model* on page 253). Note that general options, and options relating to the PowerDesigner interface (such as toolbar and window layout, favorite property sheet pages and grid

layouts) are not stored in models and can only be extracted from the registry or another user profile.

3. Click OK to open the Merge window, which lets you review and approve each proposed change before committing it. For detailed information about using this window, see *Chapter 7, Comparing and Merging Models* on page 223.
4. When you are satisfied, click OK to update the profile and return to the list.

## **Copying Preferences from a Model**

You can create or update a user profile by copying preferences from a model.



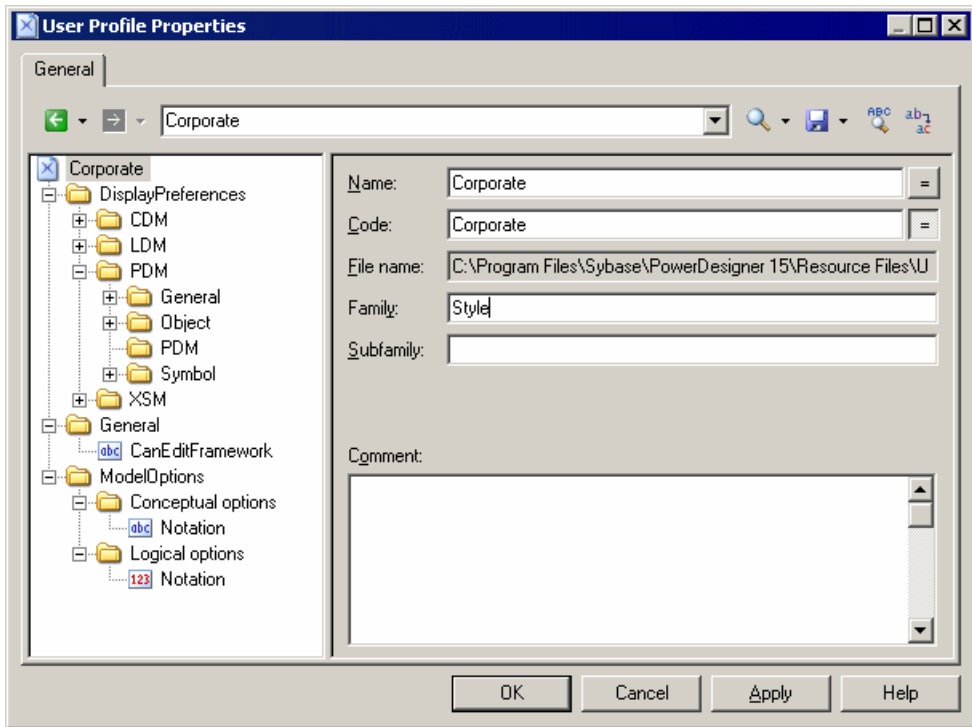
Select which model open in the Workspace to copy from and then select which of the following options and preferences to capture:

- Model Options
- Generation, and other options.
- Diagram Display Preferences - Select the diagrams to copy preferences from in the tree. To avoid conflicts, you can only select one instance of each diagram type.

## **Reviewing and Editing User Profiles in the Resource Editor**

You can open any user profile in the Resource Editor to review and edit it. Since the registry key names and values are not necessarily easy to read, we recommend that you restrict your edits in this environment to deleting unwanted defaults. You can always make additions or adjustments to the values of user profiles by extracting them from models or other profiles.

In the following example, the Corporate user profile contains display preferences for CDMs, LDMs, and PDMs, along with a general option and some model options:



To delete an item, simply right-click it and select **Remove**.

The profile root node has the following properties:

Property	Description
Name/Code	Specifies the name and code (used for scripting) for the profile.
File name	[read-only] Specifies the path to the profile file.
Family	Specifies the family in which the profile will appear in the Apply User Profile window (see <i>Applying a User Profile</i> on page 250) and if it is added to the PowerDesigner installer image. If no value is entered, the profile is added to the General family.
Subfamily	Specifies a subfamily within the profile family.

## Making Custom User Profiles Available in the PowerDesigner Installer

Once you have developed your own user profiles, you may want to add them to your PowerDesigner install image in order to allow your users to install them when they install PowerDesigner.

The user profiles that are installed with PowerDesigner are stored in the following directory on the first install CD:

## Setup/User Profiles

To include your profiles in the install, simply copy them to this directory in your install image.

For information about installing PowerDesigner, see *Installation Guide > Installing PowerDesigner*.

## General Options

You can control the look and behavior of the PowerDesigner interface through the general options, the values for which are saved in the registry of your local machine.

To set general options, select **Tools > General Options**. The following options are available under the **General** category:

Option	Description
Autosave	<p><b>Save recovery backup file every x minutes</b> - Instructs PowerDesigner to save changes to all open models to a recovery backup file at the specified interval. Enabling this option provides you with a recovery option if PowerDesigner or your computer crash before you have had a chance to save your changes.</p> <p>The save will take place after the interval has passed, but only when PowerDesigner is idle for more than ten seconds. Note that saving large or multiple models may take several seconds, and that PowerDesigner will not be responsive while it is performing the save.</p> <p>In the event that your modeling session exits abnormally, when next you open PowerDesigner you will be invited to restore your unsaved models. You can choose:</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> - to open the recovered models in the Browser allowing you to review and save or delete them as necessary.</li> <li>• <b>No</b> - to reject the recovered models and return your Browser to its last saved state.</li> </ul> <p><b>Note:</b> This option is not supported for the PowerDesigner plugin for Eclipse.</p>
Delete	<p><b>Confirm object deletion</b> - Controls the display of a confirmation dialog box when you delete an object. If you disable this option, the confirmation dialog will no longer be shown and the default behavior is as follows:</p> <ul style="list-style-type: none"> <li>• Deleting an object symbol - the symbol only is deleted.</li> <li>• Deleting an object in the browser - the object, any sub-objects it contains, and any associated diagram symbols are deleted.</li> </ul> <p>You can delete any object without confirmation at any time by selecting its symbol in a diagram and pressing <b>Shift+Delete</b>.</p> <p>For more information, see <i>Deleting Objects</i> on page 124.</p>

Option	Description
Startup	<p><b>Auto-reload last workspace</b> - Opens the last-edited workspace when you launch PowerDesigner. If this option is unchecked, PowerDesigner will open with an empty workspace.</p> <p><b>Show welcome page</b> - Displays the Welcome Page when starting PowerDesigner. If you select the Do not show this page again check box in the Welcome page, this option is deselected.</p>
Browser	<p><b>Drag and drop: Default action</b> - Specify the default result of dragging and dropping an object (without any modifier key) in the Browser. You can choose from the following:</p> <ul style="list-style-type: none"> <li>• <b>Move (Shift)</b> – The object is displaced to the new location (parent object, package, model, etc).</li> <li>• <b>Copy (Ctrl)</b> – A copy of the object is created in the new location.</li> <li>• <b>Create Shortcut (Ctrl+Shift)</b> – A shortcut to the object (see <i>Creating Shortcuts</i> on page 457) is created in the new location.</li> <li>• <b>Create replica (Alt+Shift)</b> – A replica of the object (see <i>Creating Replicas</i> on page 463) is created in the new location.</li> </ul> <p>The modifier keys given after the option are valid no matter what the default behavior.</p> <p><b>Show shortcuts</b> - Specifies that shortcuts are displayed in the Browser.</p>
Output log	<b>Log path</b> - Specifies the path to the log file where PowerDesigner records all of its outputs.
Graphical tool behavior	<b>Edit in place after creation</b> - Allows you to directly modify the name of an object from the object symbol in the diagram without opening its property sheet whenever you create an object with the Toolbox.
Sort	<b>Natural Sort</b> - Treats numbers numerically when sorting objects in the Browser. For example, a naturally sorted list of tables would have the order: Table_1, Table_3, Table_12, Table_20.

## Dialog Box Options

To review and edit options that control the look and behavior of dialog boxes, select **Tools > General Options**, and click the **Dialog** category in the left pane.

The following options are available:



*Operating Modes*

Option	Description
Auto Commit	Specifies that any change made in a property sheet is automatically committed in the object definition. You cancel a change by using the Undo feature.  If this option is disabled, you must click Apply or OK to commit your changes.
Name to Code mirroring	Automatically keeps the code of an object synchronized with its name via the application of any naming conventions (see <i>Naming Conventions</i> on page 143). To disable Name to Code mirroring on an individual object, click to deselect the equal sign button to the right of the code field.  This option is independent of (but required by) the <b>Enable name/code conversions</b> model option, which permits more complex transformations on codes via controls the application of conversion scripts (see <i>Name and Code Conversion Scripts</i> on page 146).

*Property Sheets*

In PowerDesigner, property sheets appear by default with a certain size and a series of tabs in the upper part of the dialog box. The following options are available for property sheets:

Option	Description
Keep size	Preserves the customized size you have defined
Keep last tab	Opens the property sheet to the last selected tab
Open mode	Controls how property sheets are opened. You can choose between: <ul style="list-style-type: none"> <li>• Open each object in the same property sheet</li> <li>• Open each object in its own property sheet</li> </ul>
Tabs mode	Controls the display of tabs. You can choose between: <ul style="list-style-type: none"> <li>• Tabs on one row - Aligns all tabs on a single line with arrow buttons &lt; and &gt; for browsing</li> <li>• Tabs on several rows - Displays tabs on two lines, their size corresponding to the length of their title.</li> </ul>

*Shortcut Property Sheets*

The following options are available:

Option	Description
Internal Shortcut	Controls whether double-clicking an internal shortcut opens the property sheet for the shortcut or for the target object.  You can switch from one mode to the other by pressing the <b>Shift</b> key while opening the property sheet. If the target object cannot be found (target model is closed for example), the shortcut property sheet automatically opens.
External Shortcut	Controls whether double-clicking an external shortcut opens the property sheet for the shortcut or for the target object.

For more information, see *Creating Shortcuts* on page 457.

### Object Lists

The following options are available:

Option	Description
Auto-insert rows	Specifies that a new item is created automatically in a list when you click an empty row
Use default name	Specifies that new items are given default names upon creation, allowing you to create multiple new objects without having to supply names or other properties.

## Text Editors

By default, all files are edited using PowerDesigner's internal editor. To define external editors for editing various kinds of text, such as object descriptions and annotations or PDM SQL scripts or OOM Java files, select **Tools > General Options**, and click the **Editors** category in the left pane.

By default, all files are edited using PowerDesigner's internal editor. You can define an external text editor to launch automatically for editing various kinds of objects. You can define as many text editors as you need, and the same file extension can have several text editors allocated, with the first listed acting as the default.

1. Select **Tools > General Options** and click the Editors category in the left-hand pane.
2. Click the Insert a Row tool, and enter a file extension (such as .DOC, .RTF, .TXT, .XLS) in the Extension column.

The Editor Name and Editor Command columns are both set to <internal> to indicate that the internal PowerDesigner editor will be used to edit files with this extension.

3. [optional] Enter an editor name (such as MS Word, Notepad, MS Excel) in the Editor Name column, and enter an editor command (such as winword.exe) in the Editor Command column. You can click the ellipsis button in this field to browse to the relevant directory.

4. Click OK to close the dialog box.

## Environment Variables

Environment variables provide access to paths and executables on your workstation for use in generation commands and GTL templates. To review and edit variables, select **Tools > General Options**, and click the **Variables** category in the left pane.

Click in the row of an existing variable in order to edit its value. To create a new variable, click the **Add a Row** tool and specify a name and value. The following variables are defined by default:

Variable	Description
CMD	Windows command interpreter. Default: command.com or cmd.exe
HOME	Home directory.
J2EEVERIF	Batch program for verifying if the deployment jar for an EJB is correct Default: verifier.bat
JAR	Command for archiving java files Default: jar.exe
JAVA	Command for running JAVA programs Default: java.exe
JAVAC	Command for compiling JAVA source files Default: javac.exe
JAVADOC	Command for defining JAVA doc comments Default: javadoc.exe

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**Note:** To use a variable in GTL (see *Customizing and Extending PowerDesigner > Customizing Generation with GTL*), prefix it with a dollar sign, and wrap it in percent signs. For example, `%%$CMD%`.

---

## Named Paths

Named paths allow you to resolve links between models and resource files in different environments. To review and edit named paths, select **Tools > General Options**, and click the **Named Paths** category in the left pane.

When you save a PowerDesigner model, project, or workspace, the name of a named path is saved in place of the actual path, and when you open a file, the named path is replaced with the locally defined value. For example, if the `_DBMS` named path is defined as `C : \DBMS` and you

## CHAPTER 9: Customizing Your Modeling Environment

have the path `C:\DBMS\syase1550.xdb` in your model, then the path will be saved as `%DBMS%\syase1550.xdb` to allow the model to be opened by another user who stores their DBMS definition files elsewhere.

To view the existing named paths, select **Tools > General Options**, and then click the **Named Paths** category.

To add a new named path, click the **Add a Row** tool and enter a name and a path for the named path.

---

**Note:** An administrator may push named paths to users in a general preferences profile (see *Controlling Defaults for Options and Preferences* on page 566).

---

The following paths are initialized by default:

Name	Path
_DBMS	Folder where DBMS definition files are stored.
_EXAMPLES	Folder where demo examples are stored.
_HOME	PowerDesigner installation folder. This path facilitates the installation of your add-ins without having to modify your XEM or your XML or ActiveX add-ins commands. For example: <code>%_HOME%\add-ins\SpellChecker\SpellCheckAddIn.dll</code>
_JSF	Folder where JSF libraries are stored.
_LIBRARY	Folder where object libraries are stored.
_MODELCATEGORY	Folder where model category files are stored (see <i>Model Creation Options</i> on page 264).
_OBJLANG	Folder where object language definition files are stored.
_PRCSLANG	Folder where process language definition files are stored.
_RTPLANG	Folder where report language definition files are stored.
_RULESET	Folder where impact and lineage rule set files are stored (see <i>Chapter 17, Impact and Lineage Analysis</i> on page 499).
_SHARED	Folder where the glossary and library model files are stored (see <i>The Glossary</i> on page 36 and <i>The Library</i> on page 39).
_SMARTWIN-FORM	Folder where smart winform files are stored.
_WINFORM	Folder where winform files are stored.
_XEM	Folder where extension files are stored.
_XMLLANG	Folder where XML language definition files are stored.

---

**Note:** You should not modify the name of a predefined named path. If you do so, the predefined named path is preserved in the list and a new path is created with the modified name and value. If you want to cancel a change to a predefined named path, simply delete it and close the General Options dialog. When you reopen the dialog the path is recreated with its default value.

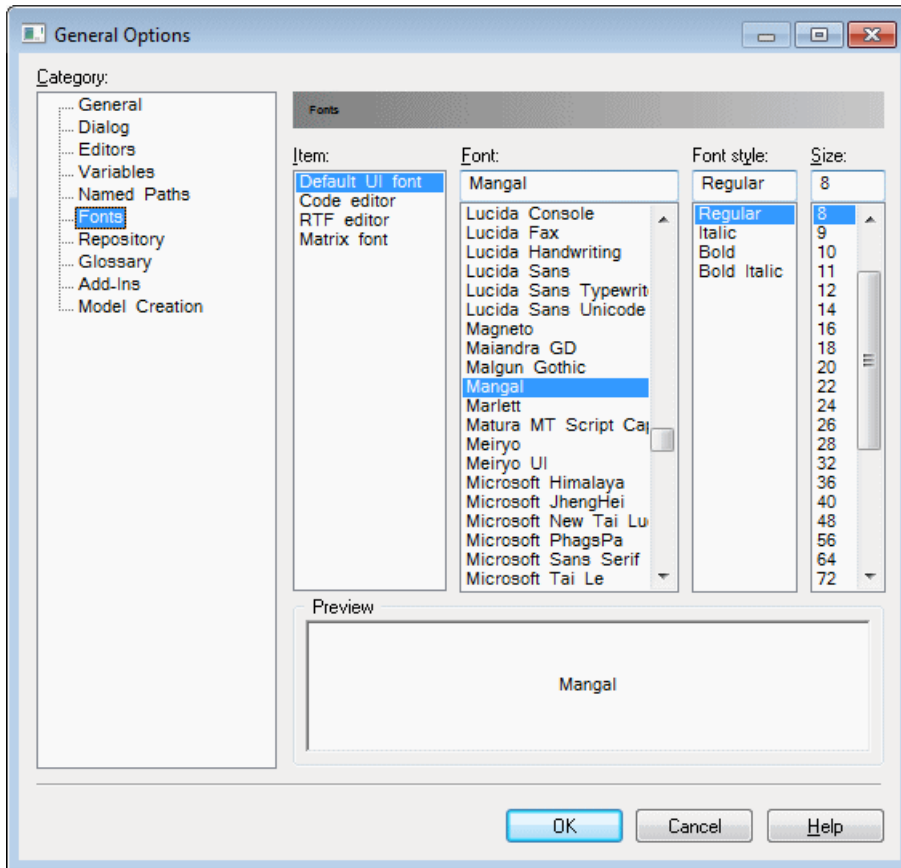
---

If you open a file containing a named path not defined on your machine, a dialog will open, offering you the following options:

- Ignore the named path and keep the file name unresolved - The link between files is broken and you may have update problems.
- Define a new named path ... - Allows you to define the path on your machine.
- Browse another existing variable to replace with – Allows you to resolve the path using one of your existing names paths.
- Directly browse the target file – Allows you to browse for another target file. The selected file will replace the file you were trying to open

## Interface Fonts

To review and modify the fonts used in the general user interface, code and rtf editors, and matrices, select **Tools > General Options**, and click the **Fonts** category in the left pane.



## Add-Ins

To review and enable add-ins to provide additional features and services in PowerDesigner, select **Tools > General Options**, and click the **Add-Ins** category in the left pane.

Add-ins installed with PowerDesigner are called *system add-ins*, and are declared in a Local Machine registry key. The following system add-ins are installed by default:

- **Microsoft SQL Server 2005 Analysis Services** - Generates and reverse engineers multidimensional objects for Microsoft SQL Server 2005 (see *Data Modeling > DBMS Definition Reference > Microsoft SQL Server*). Require the client for the appropriate version of SQL Server.

- **Microsoft Word Import** - Imports and exports MS Word documents to and from requirements models (see *Requirements Modeling > Working with Word Documents and RQMs*).
- **SAP BusinessObjects** - Generates universes from physical data models (see *Data Modeling > Building Data Models > Generating and Reverse-Engineering Databases > Generating an SAP BusinessObjects Universe*). Requires BusinessObjects 4.0 or higher.
- **SAP ERP** - Imports SAP Business Suite Data Dictionary and allows its generation to HANA (see *Data Modeling > DBMS Definition Reference > SAP Business Suite*).
- **SAP HANA** - Generates database schemas using the HANA API (see *Data Modeling > DBMS Definition Reference > SAP HANA Database*).
- **SAP Solution Manager** - Generates and reverse engineers objects to a Solution Manager server (see *Business Process Modeling > SAP Solution Manager*).
- **Spell Checker** - Uses the MS Word spell checker to check PowerDesigner object names, codes, comments, descriptions, and annotations (see *Spell Checking* on page 153). Requires Word 2000 or higher.
- **Sybase IQ Reference Architecture** - Analyzes the architecture required to deploy a SAP® Sybase® IQ data warehouse solution suitable for your workload (see *Enterprise Architecture Modeling > Sybase IQ Reference Architecture Model*).
- **XML Validation** - Checks that an XML document conforms to the schema in the XML model (see *XML Modeling*). Requires MSXML 4.0.

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**Note:** If you modify system add-in properties, you can click the **Reset Values For System Add-In** tool to recover the parameters registered in the registry.

---

You enable an add-in by selecting its checkbox.

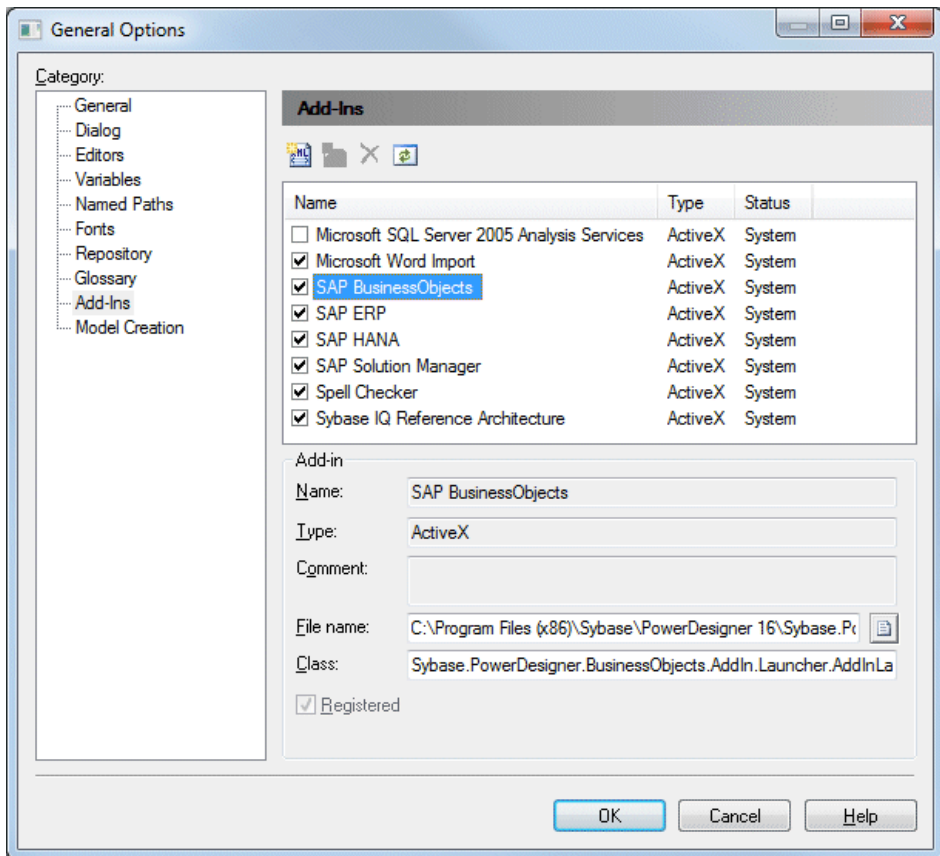
You can create your own XML or ActiveX *user add-ins*, which are declared in a Current User registry key:

**1.** Click one of the following tools:

- **Add New ActiveX Add-In** - An ActiveX add-in implements an interface that defines methods, which are invoked by PowerDesigner in order to dialog with menus and execute commands that are defined by the ActiveX.
- **Add New XML Add-In** - An XML add-in defines a menu structure for calling scripts or executables from within PowerDesigner.

For information about developing these add-ins, see *Customizing and Extending PowerDesigner > Scripting PowerDesigner > OLE Automation and Add-Ins*

- 2.** Enter the name of your add-in and click the **Select File** tool to browse to the .xml, .dll, or .exe file.
- 3.** [ActiveX only] Enter the name of the ActiveX implementation class in the **Class** field.



4. Click **OK**.

If your add-in has been correctly defined, it will immediately be available under the appropriate PowerDesigner menu.

## Model Creation Options

To review and modify options for creating models in the New Model dialog, select **Tools > General Options**, and click the **Model Creation** category in the left pane.

The following options are available:



Option	Description
Enable Categories	<p>Enables the display of the Categories button in the New Model dialog, which lets you create models from predefined templates. Select the model category set to use in the Default category set list. If no valid model category set is selected then the Categories button will not be available.</p> <p>Click the Select Path tool to the right of this field to browse to another folder containing model category sets or click the Properties tool to open the currently-selected set in the Resource Editor. For more information about category sets, which are often developed by an administrator, see <i>Customizing the New Model Dialog</i> on page 553.</p>
Enable Model Types	Enables the display of the Model types button in the New Model dialog, which lets you create models from the classic list of model types.
Enable model template files	<p>Enables the display of the Template files button in the New Model dialog, which lets you create models from model templates. If no valid template directory is selected then the Templates button will not be available.</p> <p>Click the Select Path tool to the right of this field to browse to another folder containing model templates. For more information about model templates, see <i>Model Templates</i> on page 11.</p>

For information about using the New Model dialog, see *Creating a Model* on page 9.

## Repository Options

To review and modify options for connecting to the repository, controlling the Repository Browser tab, and setting various defaults, select **Tools > General Options**, and click the **Repository** category in the left pane.

### Connection

The following options are available in the **Connection** group box:

Option	Description
Auto-connect	Automatically connects to the last connected repository when you start a PowerDesigner session (see <i>Connecting Automatically to the Default Repository</i> on page 17).
Apply profiles	Re-applies all UI preferences profiles and general preferences profiles that are associated with the user (either directly, or by membership of groups) at each connection to the repository (see <i>Using Profiles to Control the PowerDesigner Interface</i> on page 560). This option is selected by default and may cause local customizations to your interface, options, and preferences to be overwritten.

Option	Description
Default bytes per char	Specifies the default number of bytes per character used by the repository database. This value is used to initialize the Bytes per char parameter in the Direct Repository Definition dialog (see <i>Setting up PowerDesigner for Direct Access</i> on page 13).

### Browser

The following options are available in the **Browser** group box:

Option	Description
Auto-refresh	Refreshes the Repository Browser at the interval specified in the Refresh every box.
Display	Specifies whether the name or code of items is displayed in the Repository Browser.
Display model contents	Enables the display of model diagrams and objects in the Repository Browser.
Display version numbers	Enables the display of version numbers for items in the Repository Browser.
Display status icons in Local Browser	Enables the display of status icons (which track whether items are locked and if changes have been made locally and/or in the repository since check out) in the Local Browser (see <i>Chapter 2, The Browser</i> on page 35).

### Check Out

The following options in the **Check Out** group box control the default selection of options in the Check Out dialogs (see *Checkout Parameters* on page 315):

Option	Description
Merge document	Specifies that the <b>Merge document</b> option is selected by default.
Add to workspace	Specifies that the <b>Add to workspace</b> option is selected by default.
Check out dependencies	Specifies that the <b>Check out dependencies</b> option is selected by default.
Automatic resources update	<p>Enables the automatic checking out and updating of shared resource files.</p> <p><b>Note:</b> This option controls a legacy feature, which has been superceded by the library (see <i>Sharing Resource Files via the Library</i> on page 551).</p>

*Check In*

The following options in the **Check In** group box control the default selection of options in the Check In dialogs (see *Check-In Parameters* on page 297):

Option	Description
Batch update	Specifies that the <b>Batch update</b> option is selected by default.
Freeze after check in	Specifies that the <b>Freeze after check in</b> option is selected by default.
Save diagrams for PowerDesigner Portal	Specifies that the <b>Save diagrams for PowerDesigner Portal</b> option is selected by default.

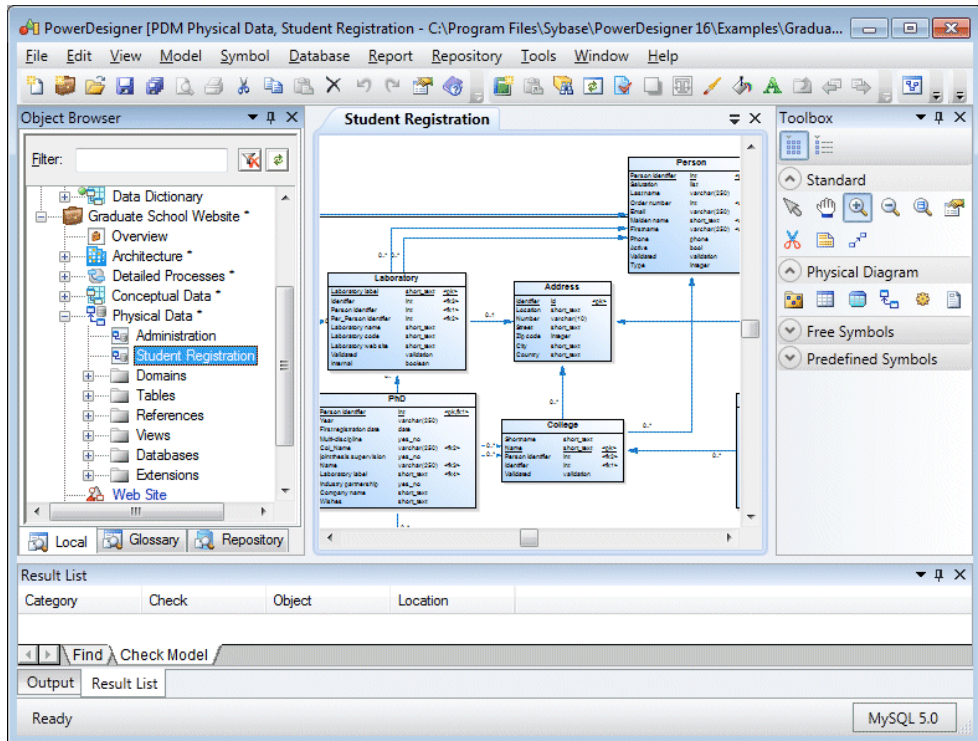
*Local Cache*

The following options in the **Local cache** group box control the caching of models checked into and out of the repository on your local workstation. The cache, which is enabled by default, saves a local copy of models you check out in the cache directory, and can speed up check ins and check outs when you are primarily working with models that are rarely modified by other users. The following options are available:

Option	Description
Path	Specifies the location of the cache.
Maximum size (MB)	By default, the maximum size is set to 50MB. Click the <b>Clear Cache</b> button to empty the contents of the cache.

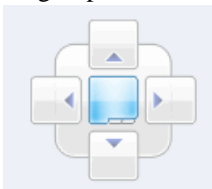
## Organizing Views

The PowerDesigner window contains the Browser, Toolbox, Canvas, Result List, and Output sub-windows or views, which you can move, group, split, hide, or auto-hide to suit your workflow.



To move a view, click on its title bar or upper or lower tab and drag and drop it onto the docking control that appears as you hover over a view. You can perform the following kinds of movement in this way:

- To group the view with another view - drop it on the central dock selector:



The dropped view is stacked on the other view, and each has a tab at the bottom of the group to select it.

- To place the view next to, above, or below a view - drop it on the left, right, top, or bottom dock selector. You can use this to divide the canvas and show multiple diagrams together.
- To place the view next to, above, or below a view, and have it extend the full height or breadth of the PowerDesigner window - drop it on the separate left, right, top, or bottom dock selectors that appear near the extremities of the window:



- To promote a view to an independent window - drop it anywhere except on a dock selector.

---

**Note:** The Canvas is a special view that displays diagrams as tabbed documents. You can drag other views onto the Canvas, but you cannot drag Canvas diagrams elsewhere in the PowerDesigner window (though you can promote them to independent windows). Right-click a diagram tab to access a menu that lets you close the diagram, close every diagram except this one, or split the canvas horizontally or vertically.

---

All views except the canvas have a menu available on their title bar to:

- **Float** - promote the view to an independent window.
- **Show** - disable auto-hiding (or click the sideways pin to pin the view open).
- **Dock as Tabbed Document** - add the view as a tab to the Canvas.
- **Auto Hide** - hide the view as a small tab on the side of the screen, that re-expands when you hover over it (or click the vertical pin to unpin the view).
- **Hide** - remove the view from your window. To show a hidden view, select **View > View Name**.

---

**Note:** The Browser is a single view with up to three sub-views (Local, Glossary, and Repository). These sub-views cannot be moved independently.

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## Organizing Toolbars

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The PowerDesigner window provides various toolbars, which you can show, hide, organize, and customize to suit your workflow.

- To move a toolbar in the toolbar tray, click and hold on the four dots on the left edge of the toolbar and drag it to the desired position.
- To show a hidden toolbar or hide a visible toolbar - right-click the toolbar tray and select **Toolbars** and check or uncheck the toolbar.
- To access tools on a toolbar that is not fully visible due to lack of space - click on the down arrow on the right edge of the toolbar.

- To lock all toolbars to protect them from accidental movements - right-click the toolbar tray and select **Toolbars > Lock Toolbars**.
- To add tools to or remove them from a toolbar, or to create new toolbars - right-click the toolbar tray and select **Toolbars > Customize Menus and Tools** (see *Customizing Menus, Toolbars, and Toolboxes* on page 270).

---

**Note:** The Toolbox (see *Creating Objects from the Toolbox* on page 89) is not a toolbar, and you cannot add Toolbox tools (such as those for creating a PDM table or OOM class) to a toolbar, nor add toolbar tools to the Toolbox.

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## Customizing Menus, Toolbars, and Toolboxes

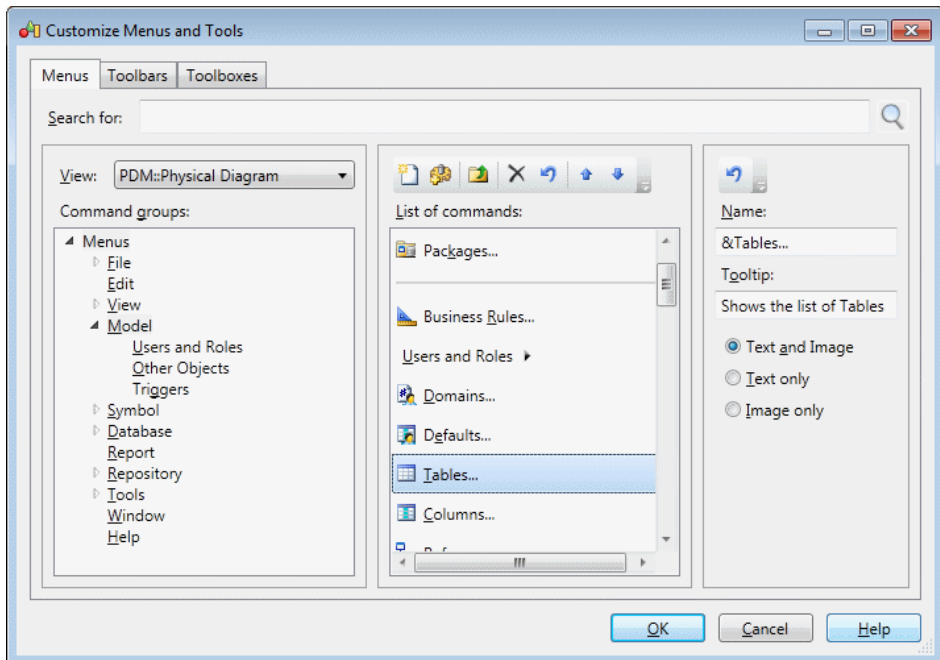
To customize PowerDesigner menus, toolbars, and toolboxes, select **Tools > Customize Menus and Tools**.

---

**Note:** An administrator can prepare customized UI profiles, which are made available to users on their first connection to the repository (see *Controlling Defaults for Menus, Toolbars, and Toolboxes* on page 565).

---

1. Select **Tools > Customize Menus and Tools**. The dialog opens to the **Menus** tab, initialized to your current view (here, the PDM Physical Diagram):



**Note:** Search for any command available in the present context by entering it in the **Search for** field and clicking **Find**. Methods and menus defined in resource files and custom

commands are not available for selection and cannot be moved in this dialog (see *Customizing and Extending PowerDesigner > Extension Files > Menus (Profile)*).

2. [optional] Select a different view to customize. The following views are available:
  - **No View** - when PowerDesigner is running but no model is open and selected.
  - **Type Diagram** - each diagram is listed separately.
  - **All Views** - provides a union of all the menus available in all possible views.

---

**Note:** You can make changes in multiple different views. All your UI preferences are saved in a single resource file.

---

3. Navigate to and select a command group (menu or submenu) to modify in the tree in the left panel. The commands that are available on the selected menu, submenu, toolbar, or toolbox are listed in the middle panel.



The middle panel shows the contents of only one level at a time. To see the contents of a submenu, double-click it to descend into its commands. Click the **Go Up One Level** tool to return to the parent menu. For example, to see the contents of the **Repository > Administration** submenu, expand the **Repository** node in the left panel, and select the **Administration** node, or click the **Repository** node in the left panel, and double-click the **Administration** node in the middle panel.






---

**Note:** The special commands in the format `<Command>` such as `<Recent Files>` and `<New Diagrams>` are placeholders for points where the menu dynamically calculates commands to insert. The `<Stereotypes used as Metaclass>` placeholder, which is present by default in the **Model** menu, instructs PowerDesigner to insert a command to open a list of objects for each type of new object defined in a model definition or extension file (see *PowerDesigner Resource Files* on page 272). If you remove this command from this menu, then all such object lists will be hidden. If you want to display such object lists under another menu, then you must add both the parent metaclass from which they are derived and the `<Stereotypes used as Metaclass>` placeholder.

---

4. Use the tools in the middle panel to add, remove, reorder, or otherwise modify the commands of the selected command group:

To ol	Description
	<b>Create New Menu</b> - Creates a new sub-menu to add to the command group. The sub-menu acts as a container for commands.
	<b>Add Commands</b> - Opens a selection dialog to add a command to the selected command group. The Add Commands dialog has a <b>Pick Command</b> tab to let you select available commands from a tree and a <b>Filter Commands</b> tab to let you filter the list of available commands by entering a string. When you have located the command to add, select it and click <b>OK</b> .

To ol	Description
	<b>Go Up One Level</b> - Displays the commands of the parent menu of the currently selected menu.
	<b>Remove</b> - Deletes the selected command from the command group.
	<b>Reset List</b> - Undoes any changes to the command group.
	<b>Move Up</b> - Moves the selected command up one place in the list.
	<b>Move Down</b> - Moves the selected command down one place in the list.

5. [optional] Select a command in the middle pane and use the fields in the right pane to change its name, tooltip, and display method (text and/or image).

---

**Note:** Inserting an ampersand sign in the **Name** field before a letter enables its use as an **Alt** key menu shortcut. For example, the **File** menu has, by default, its name defined as &F*ile* so that users can press **Alt+F** to activate this menu.

---

6. [optional] Select the **Toolbars** (see *Organizing Toolbars* on page 269) or **Toolboxes** (see *Creating Objects from the Toolbox* on page 89) tab to customize these UI elements.
7. Click **OK** to save your changes and apply them to your environment.

## PowerDesigner Resource Files

---

The SAP® Sybase® PowerDesigner® modeling environment is powered by XML-format resource files, which define the objects available in each model along with the methods for generating and reverse-engineering them. You can view, copy, and edit the provided resource files and create your own in order to customize and extend the behavior of the environment.

The following types of resource files, based on or extending the PowerDesigner public metamodel are provided:










- *Definition file:* customize the metamodel to define the objects available for a specific DBMS or language:
  - *DBMS definition files* (.xdb) - define a specific DBMS in the PDM (see *Customizing and Extending PowerDesigner > DBMS Definition Files*).
  - *Process, object, and XML language definition files* (.xpl, .xol, and .xsl) – define a specific language in the BPM, OOM, or XSM (see *Customizing and Extending PowerDesigner > Object, Process, and XML Language Definition Files*).
- *Extension files* (.xem) – extend the standard definitions of target languages to, for example, specify a persistence framework or server in an OOM. You can create or attach one or more XEMs to a model (see *Extension Files* on page 275).




- *Report templates* (.rtp) - specify the structure of a report. Editable within the Report Template Editor (see *Report Templates* on page 417).
- *Report language files* (.xrl) – translate the headings and other standard text in a report (see *Customizing and Extending PowerDesigner > Translating Reports with Report Language Resource Files*).
- *Impact and lineage analysis rule sets* (.rul) - specify the rules defined for generating impact and lineage analyses (see *Analysis Rule Sets* on page 512).
- *Object permission profiles* (.ppf) - customize the PowerDesigner interface to hide models, objects, and properties (see *Controlling the Availability of Models, Objects, and Properties* on page 560).
- *User profiles* (.upf) - store preferences for model options, general options, display preferences, etc (see *User Profiles* on page 249).
- *Model category sets* (.mcc) - customize the New Model dialog to guide model creation (see *Customizing the New Model Dialog* on page 553).
- *Conversion tables* (.csv) - define conversions between the name and code of an object (see *Creating a Conversion Table* on page 149).

You can review all the available resource files from the lists of resource files, available by selecting **Tools > Resources > type**.

The following tools are available on each resource file list:

Tool	Description
	Properties - Opens the resource file in the Resource Editor.
	New - Creates a new resource file using an existing file as a model (see <i>Creating and Copying Resource Files</i> on page 274).
	Save - Saves the selected resource file.
	Save All - Saves all the resource files in the list.
	Path - Specifies the directories that PowerDesigner should search to populate the list (see <i>Specifying Directories to Search for Resource Files</i> on page 274).
	Compare - Selects two resource files for comparison.
	Merge - Selects two resource files for merging.
	Check In - [if the repository is installed] Checks the selected resource file into the repository. For information about storing your resource files in the repository, see <i>Sharing Resource Files via the Library</i> on page 551.
	Update from Repository - [if the repository is installed] Checks out a version of the selected file from the repository to your local machine.

Tool	Description
	Compare with Repository - [if the repository is installed] Compares the selected file with a resource file stored in the repository.

## Sharing and Embedding Resource Files

Resource files can be shared and referenced by multiple models or copied to and embedded in a single model. Any modifications that you make to a shared resource are available to all models using the resource, while modifications to an embedded resource are available only to the model in which it is embedded. Embedded resource files are saved as part of their model and not as a separate file.

---

**Note:** You should never modify the original extensions shipped with PowerDesigner. To create a copy of the file to modify, open the List of Extensions, click the **New** tool, specify a name for the new file, and then select the .xem that you want to modify in the **Copy from** field.

---

The **File Name** field displays the location of the resource file you are modifying is defined. This field is empty if the resource file is embedded.

## Creating and Copying Resource Files

You can create a new resource file in the appropriate resource file list. To create a copy of an existing resource file, select it in the **Copy from** field of the **New...** dialog.

---

**Warning!** Since each resource file has a unique id, you should only copy resource files within PowerDesigner, and not in Windows Explorer.

---

1. Select **Tools > Resources > Type** to open the appropriate resource file list.
2. Click the **New** tool, enter a name for the new file and select an existing file to copy. Select the <Default template> item to create a minimally completed resource file.
3. Click **OK** to create the new resource file, and then specify a filename and click **Save** to open it in the Resource Editor.

---

**Note:** You can create an extension file directly in your model from the List of Extensions. For more information, see *Creating an Extension File* on page 276.

---

## Specifying Directories to Search for Resource Files

Use the **Path** tool in the resource list toolbar to specify directories to search to populate the list. If you plan to modify the standard resource files or create your own, you must store these files in a directory outside the PowerDesigner installation directory.

By default, only the directory inside the `Program Files` folder containing the standard resource files appears in the list, but PowerDesigner does not allow you to save modifications there, and will propose an alternative location if you try to do so, adding the selected directory to the list. You can add additional directories as necessary.

---

**Note:** If you have created or modified resource files inside `Program Files` before 16.5, when this rule was introduced, your files may no longer be available as Windows Vista or Windows 7 actually store them in a virtual mirror at, for example, `C:\Users\username\AppData\Local\VirtualStore\Program Files\Sybase\PowerDesigner 16\Resource Files\DBMS`. To restore these files to your lists, optionally move them to a more convenient path, and add their location to your list using the **Path** tool.

---

The first directory in the list is the default location, which is proposed whenever you save a file. The root of the library belonging to your most recent repository connection is searched recursively before the directories in the list (see *Sharing Resource Files via the Library* on page 551), .

---

**Note:** In rare cases, when seeking resource files to resolve broken references in models, the directories in the list are scanned in order, and the first matching instance of the required resource is used.

---

## Extension Files

Extensions files (`*.xem`) allow you to customize and extend the PowerDesigner metamodel to support your exact modeling needs. You can define additional properties for existing objects or specify entirely new types of objects, modify the PowerDesigner interface (reorganizing and adding property sheet tabs, Toolbox tools and menu items), and define additional generation targets and options.

Extension files have an `.xem` extension and are located in `install_dir/Resource Files/Extended Model Definitions`.

Lists of extension files by model type are available by selecting **Tools > Resources > Extensions > model type**. For information about the tools available in resource file lists, see *PowerDesigner Resource Files* on page 272.

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**Note:** Extensions, such as the Excel Import extension, which can be attached to any model type, are available in the list at **Tools > Resources > Extensions > All Model Types**.

---

Each extension file contains two first-level categories:

- *Generation* - used to develop or complement the default PowerDesigner object generation (for BPM, OOM, and XSM models) or for separate generation. For more information, see *Customizing and Extending PowerDesigner > Object, Process, and XML Language Definition Files > Generation Category*.
- *Profile* - used for extending the metaclasses in the PowerDesigner metamodel. You can:
  - Create or sub-classify new kinds of objects:
    - Metaclasses – drawn from the metamodel as a basis for extension.
    - Stereotypes [for metaclasses and stereotypes only] – sub-classify metaclasses by stereotype.

- Criteria – sub-classify metaclasses by evaluating conditions.
- Add new properties and collections to objects and display them:
  - Extended attributes – to add metadata.
  - Extended collections and compositions – to enable manual linking between objects.
  - Calculated collections – to automate linking between objects.
  - Dependency matrices – to show dependencies between two types of objects.
  - Forms – to modify property sheets and add custom dialogs.
  - Custom symbols – to change the appearance of objects in diagrams.
- Add constraints and validation rules to objects:
  - Custom checks – to test the validity of your models on demand
  - Event handlers – to perform validation or invoke methods automatically.
- Execute commands on objects:
  - Methods – VBScripts to be invoked by menus or form buttons.
  - Menus [for metaclasses and stereotypes only] – to add commands to PowerDesigner menus.
- Generate objects in new ways:
  - Templates – to extract text from object properties.
  - Generated Files - to assemble templates for preview and generation of files
  - Transformations – to automate changes to objects at generation or on demand.
- Map correspondences between different metamodels:
  - Object generations - to define mappings between different modules in the PowerDesigner metamodel for model-to-model generation.
  - XML imports - to define mappings between an XML schema and a PowerDesigner module to import XML files as models.

---

**Note:** Since you can attach several resource files to a model (for example, a target language and one or more extension files) you can create conflicts, where multiple extensions with identical names (for example, two different stereotype definitions) are defined on the same metaclass in separate resource files. In case of such conflicts, the extension file extension usually prevails. When two XEMs are in conflict, priority is given to the one highest in the List of Extensions.

---

### **Creating an Extension File**

You can create an extension file directly in your model or from the appropriate list of extension files.

---

**Note:** Extensions, such as the Excel Import extension, which can be attached to any model type, can only be created from the **All Model Types** extension list. For information about creating an extension file from a list of extension files, see *Creating and Copying Resource Files* on page 274.

---

1. Open your model, and then select **Model > Extensions** to open the List of Extensions.
2. Click the **Add a Row** tool and enter a name for the new extension file.
3. Click the **Properties** tool to open the new extension file in the Resource Editor, and create any appropriate extensions.
4. When you have finished, click **OK** to save your changes and return to the List of Extensions.

The new XEM is initially embedded in your model, and cannot be shared with any other model. For information about exporting your extensions and making them available for sharing, see *Exporting an Embedded Extension File for Sharing* on page 278.

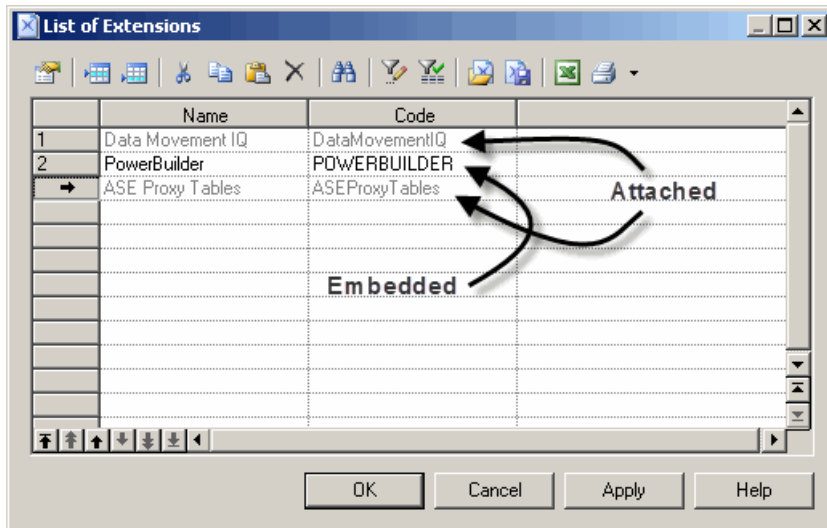
### **Attaching Extensions to a Model**

Extensions can be stored in \*.xem files that you can attach to one or more models. You can attach one or more extension files to a model at creation time by clicking the **Select Extensions** button on the New Model dialog. You can subsequently attach extension files to your model at any time from the List of Extensions.

1. Select **Model > Extensions** to open the List of Extensions, which contains extensions attached to the model.
2. Click the **Attach an Extension** tool to open the Select Extensions dialog.
3. Review the different sorts of extensions available by clicking the sub-tabs and select one or more to attach to your model.

By default, PowerDesigner creates a link in the model to the specified file. To copy the contents of the extension file and save it in your model file, click the **Embed Resource in Model** button in the toolbar. Embedding a file in this way enables you to make changes specific to your model without affecting any other models that reference the shared resource.

4. Click **OK** to return to the List of Extensions.



Extension files listed in grey are attached to the model, while those in black are embedded in the model.

**Note:** If you embed an extension file in the model, the name and code of the extension may be modified in order to make it respect the naming conventions of the Other Objects category in the Model Options dialog.

## Exporting an Embedded Extension File for Sharing

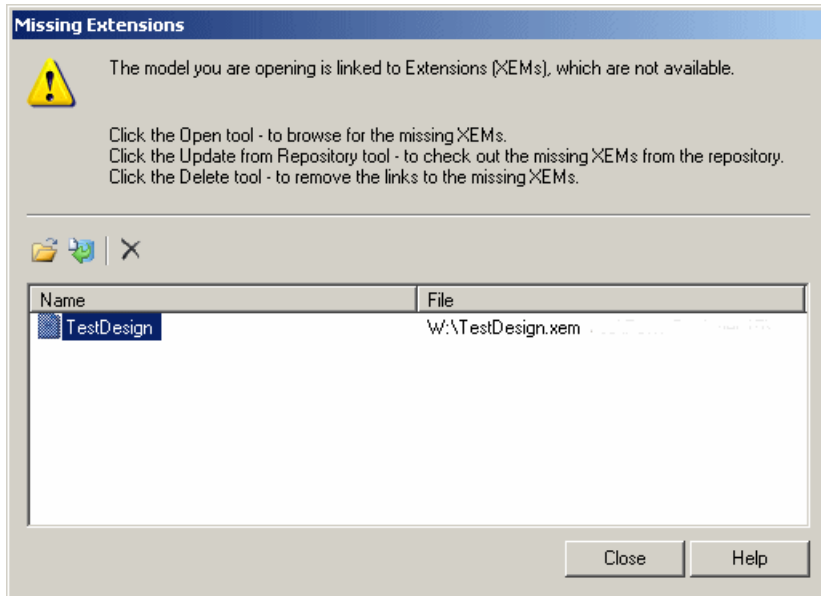
If you export an XEM created in a model, it becomes available in the List of Extensions, and can be shared with other models. When you export an XEM, the original remains embedded in the model.

1. Select **Model > Extensions** to open the List of Extensions, which contains extensions attached to the model.
2. Select an embedded extension in the list and click the **Export an Extension** tool.
3. Enter a name and select a directory to which to save the extension file and click **Save**.




**Note:** For the extension to be available for attaching to other models, you must save it to a directory that is listed by the **Path** tool in the appropriate extension list (see *Specifying Directories to Search for Resource Files* on page 274).

### Reconnecting to Missing Extensions

If you rename, move or delete extension files that are attached to a model, you may lose the links to them in your model. When you next open a model sharing the affected extensions, PowerDesigner will try to help you reconstruct the broken links.



The following tools are available in this dialog:

Tool	Description
	Open – Lets you browse to, and re-attach, the missing XEMs.
	Update from Repository – Lets you check out the missing XEMs from the repository.
	Delete – Lets you remove the links between the model and the missing XEMs.

## Shortcut Keys

PowerDesigner provides many shortcut keys to accelerate your workflow.

### Toolbox Shortcuts

Shortcut	Action
Double-click <b>Pointer</b> tool / <b>Ctrl+A</b>	Select all symbols in diagram.

Shortcut	Action
Double-click <b>Delete</b> tool	Delete all selected symbols (with confirmation).
Double-click <b>Grabber</b> tool	Zoom to whole diagram.
Double-click any object tool	Select all symbols of this type.
<b>Shift</b> +Double-click any object tool	Retain current selection and add all symbols of this type.
Right-click	Release tool and select pointer.

*Browser Shortcuts*

Shortcut	Action
* (number pad)	Expand all nodes.
+ (number pad)	Expand subnodes.
- (number pad)	Collapse subnodes.
<b>F2</b>	Rename selected item.
<b>Ctrl</b> + <b>Shift</b> + <b>F</b>	Find selected item in Diagram.

*Diagram Shortcuts*

Shortcut	Action
<b>DEL</b> and <b>Shift</b> + <b>DEL</b>	Delete object (with and without confirmation).
<b>Alt</b> + <b>ENTER</b>	Open object property sheet.
<b>Ctrl</b> + <b>K</b>	Paste as shortcut.
<b>Ctrl</b> + <b>H</b>	[on selected link] Force link to horizontal.
<b>Ctrl</b> + <b>L</b>	[on selected link] Force link to vertical.
<b>Ctrl</b> + <b>Page Up</b> and <b>Ctrl</b> + <b>Page Down</b>	Bring symbol to front and send symbol to back.
<b>Ctrl</b> + <b>Home</b> and <b>Ctrl</b> + <b>End</b>	Align selection on vertical and horizontal axis.
<b>Ctrl</b> + <b>T</b>	Open Symbol Format dialog.
<b>Ctrl</b> + <b>J</b>	Auto-resize the symbol to display all the text it contains up to the value specified for word wrapping in the diagram.
<b>Ctrl</b> + <b>Resize</b>	Resize object while keeping same center point.



Shortcut	Action
<b>Ctrl+Shift+Resize</b>	Resize object while keeping same center point and proportions.
<b>F2 or Ctrl+Right-click on Name</b>	Rename object.

*Drag and Drop Shortcuts*

Shortcut	Action
<b>Shift+Drag and drop</b>	Move object.
<b>Ctrl+Drag and drop</b>	Copy object.
<b>Shift+Ctrl+Drag and drop</b>	Create shortcut of object.
<b>Alt+Drag and drop</b>	Create replica of object.
<b>Right-click+Drag and drop</b>	Open menu to choose an action.

*Window and General Shortcuts*

Shortcut	Action
<b>F4</b>	Check model.
<b>F5</b>	Zoom to actual size.
<b>F6</b>	Zoom in.
<b>F7</b>	Zoom out.
<b>F8</b>	Zoom to whole diagram.
<b>F9</b>	Previous view.
<b>F10</b>	Display used pages.
<b>Shift+F5</b>	Redisplay.
<b>Shift+F9</b>	Next view.
<b>Shift+Click item</b>	Select consecutive items.
<b>Alt+0</b>	Show/hide Browser.
<b>Alt+1</b>	Show/hide Output view.
<b>Alt+2</b>	Show/hide Result List view.
<b>Alt+3</b>	Show/hide Welcome page.

Shortcut	Action
<b>Alt+F6</b>	Cycle between active windows.
<b>Ctrl+Double-click / Ctrl++ (plus)</b>	[on package or other composite symbol] Open subdiagram.
<b>Ctrl+Tab</b>	Cycle through property sheet tabs.
<b>Ctrl+Page Up / Ctrl+Page Down</b>	Cycle through property sheet tab subtabs.
<b>Ctrl+B</b>	Find selected object in Browser.
<b>Ctrl+D</b>	Select diagram.
<b>Ctrl+E</b>	Open list of reports.
<b>Ctrl+F</b>	Find objects.
<b>Ctrl+F4</b>	Close diagram.
<b>Ctrl+Alt+F4</b>	Close model.
<b>Ctrl+F6 / Ctrl+Shift+F6</b>	Cycle between property sheets.
<b>Ctrl+U</b>	Go to parent diagram.
<b>Shift+F2</b>	Open workspace.
<b>Shift+F3</b>	Save workspace.
<b>Shift+F4</b>	Close workspace.

*List Shortcuts*

Shortcut	Action
<b>F2</b>	Select text for edit.
<b>F4</b>	Select cell to add text.
<b>Ctrl+Shift+Spacebar</b>	Select line.
<b>Ctrl+A</b>	Select all.
<b>Ctrl+Shift+A</b>	Deselect all.
<b>Ctrl+N</b>	Add entry.
<b>Ctrl+I</b>	Insert entry.
<b>Ctrl+D</b>	Delete entry.

*Code Preview Tab Shortcuts*

Shortcut	Action
<b>F2</b>	Next bookmark.
<b>F3</b>	Find next.
<b>Shift+F11</b>	Menu.
<b>Ctrl+F2</b>	Insert/Remove bookmark.
<b>Ctrl+I</b>	Insert file.



## PART II

# Storing, Sharing, and Reporting on Models

PowerDesigner provides a robust repository solution to store models and other project files and make them available to other PowerDesigner users. The optional PowerDesigner Portal allows any user with an account to review models in a Web browser. You can produce model reports in HTML and RTF format for wider distribution.



## CHAPTER 10      The Repository

The PowerDesigner repository is a tool for storing and sharing versioned models and other files used in your modeling process. It provides robust, granular security, and supports full access from within PowerDesigner and viewing and some administration via a Web browser.

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**Note:** Before you can access the repository, an administrator must install and configure it and provide you with a user name and password.

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The following sections provide information about installing and administering the repository:

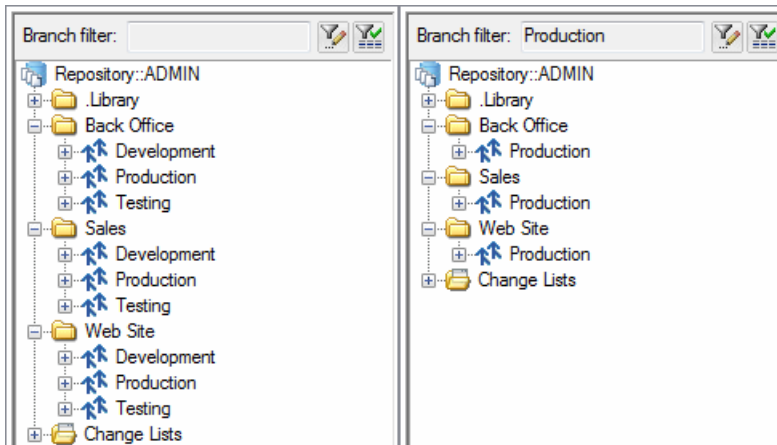
- Installing and maintaining the repository (see *Installation Guide > Installing the Repository*)
- Providing access to the repository by managing rights and permissions (see *Chapter 18, Controlling Repository Access* on page 521)
- Providing customization of the PowerDesigner interface through permission, UI, and general profiles (see *Chapter 20, Customizing the PowerDesigner Interface* on page 553)
- Deploying an enterprise glossary and library of reference models and other documents to be shared with all users (see *Chapter 19, Deploying an Enterprise Glossary and Library* on page 541)
- Adding resource files to the repository and managing their sharing (see *Sharing Resource Files via the Library* on page 551)

### Browsing the Repository

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The Repository tab of the Browser displays the contents of the repository.

To expand all nodes, press the numpad plus sign (+). To collapse all nodes, press the numpad minus sign (-). To filter the Browser tree by branch (see *Branching Version Trees* on page 325), click the **Customize Branch Filter** tool and select the branches you want to view in the **Branch Filter Selection** dialog. The filter works simply by name, so that branch names that are reused in different folders are treated as the same. You can toggle the use of the filter with the **Enable/Disable Branch Filter** tool:




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**Note:** You can only see repository objects if you have at least List permission on them (see *Granting Access Permissions on Repository Items* on page 534).

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A typical hierarchy of objects in the Browser **Repository** tab may include

- *Root* - [when connection is established] Displays the repository definition name, the user login, and the current branch (see *Repository Root Properties* on page 290).
- *Folders* - Used to organize documents in the repository (see *Repository Folders* on page 288).
- *Library* - A folder containing enterprise models that are pushed automatically to all users when they connect to the repository (see *The Library* on page 39).
- *Branches* - Allow concurrent development of multiple versions of documents (see *Branching Version Trees* on page 325).
- *Projects* - Container for models and other files (see *Chapter 3, Projects and Frameworks* on page 47).
- *Documents* - Models, multi-model reports, resource files, and external application files such as MS Office files, or graphics.
- *Packages* - Model packages (see *Packages* on page 44).
- *Diagrams, object categories, and objects* - Are displayed only if the **Show objects** general option is selected (see *Repository Options* on page 265).

### **Repository Folders**

You can use folders to organize the contents of the repository by, for example, creating separate folders for each subject area, or each team working on a project. You must have write permission on the location where you want to create the folder. Documents checked in inside a folder inherit its permissions.

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**Note:** A PowerDesigner project (see *Chapter 3, Projects and Frameworks* on page 47) acts as both a repository document and a folder. Use the project permissions to control working with the project file itself (project diagram and any framework or dependency matrices) and the

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folder permissions to grant access to the models contained within the project, as you would for a repository folder.

You create a folder by right-clicking the root node, a project, or a folder, selecting **New > Folder**, and entering a name for the folder in the property sheet. Click the **Permissions** tab to add permissions for all appropriate users and groups for the folder and its contents (see *Granting Access Permissions on Repository Items* on page 534).

You can rename a folder from its property sheet or by selecting its node in the Browser and pressing the **F2** key.

You can move folders and documents in the repository by drag and drop. You cannot move a single document version nor can you move objects from one model to another. To move a folder or a model you must have **Full** permission on the folder or model to be moved, and **Write** permission on the target folder. You cannot move a project inside another project.

For information about deleting a folder, see *Deleting Documents, Document Versions, and Folders* on page 334.

## Repository Document Properties

Double-click any item in the repository to see its repository property sheet.

The **General** tab displays read-only information about the object:

Property	Description
Name/Code/ Comment	Display the name, code, and comment of the object. Repository folders have an editable name, but no code or comment.
Type	[not available for folders] Specifies whether the item is a PowerDesigner model or package, or another type of document or object.
Location	[folders, documents, and model objects] Displays the full path to the folder or document.  [model packages]: Displays the hierarchy of packages in the model.
Status	[not available for folders] Indicates the status of the document, which can be Updatable, Frozen (see <i>Freezing and Unfreezing Document Versions</i> on page 320), or Locked (see <i>Locking and Unlocking Document Versions</i> on page 321).

### Version Info Tab

The **Version Info** tab displays information about the current version of the object:

Property	Description
Creation	Displays the name of the user who created the item in the repository, and the date of creation.

Property	Description
Last modification	Displays the name of the user who last modified the item, and the date of this modification.
Generated From Origin Object	[model objects only] When the current object has been generated from another object, displays the name of the origin object. Click the <b>Properties</b> button to the right of this field to open the origin object property sheet.
Version	[not available for folders] Displays the number, branch name, and check-in comment for the current version.

### *Versions Tab*

The **Versions** tab displays a tree of the versions of the document including any versions under branches. For more information about this tab, see *Document Versions* on page 318.

The following tabs are also available:

- **Notes** [models, packages, and model objects only] - contains annotations and descriptions of the object (see *Notes Tab* on page 101)
- **Attributes** [models, packages, and model objects only] - displays additional properties for these items.
- **Collections** [models, packages, and model objects only] - displays a list of collections or related objects (but not sub-objects) for the item. For example, the Collections tab in the property sheet of a CDM entity may display the business rules attached to the entity, but will not display entity attributes.
- **Permissions** [models, packages, folders and other documents only] – lists those users and groups with permissions on the document (see *Granting Access Permissions on Repository Items* on page 534).

## **Repository Root Properties**

Right-click the root of the Repository tab of the Browser, and select Properties to open its property sheet.

The **Connection** tab contains the following properties:

Property	Description
Repository name	Specifies the name of the repository to which you are connected.
Login name	Specifies the login name through which you are connected.

In addition, the following tabs are available:

- **LDAP** - lists LDAP configuration parameters to enable remote LDAP users to access the repository (see *Connecting to an LDAP Server for User Authentication* on page 524).

- **SMTP** - lists parameters for connecting the repository to an SMTP server (see *Connecting to an SMTP Server for Notifications* on page 527).
- **Passwords** - lists the requirements of the policy which controls the qualities of user passwords for the repository (see *Defining a Password Policy* on page 528).
- **Permissions** – lists those users and groups with permissions on the entire repository (see *Granting Access Permissions on Repository Items* on page 534).
- **Version Info** – specifies when the repository was created and last modified (see *Version Info Tab* on page 106).

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**Note:** In addition to the standard version properties, the repository root also has a **Repository ID**, specifying the unique identifier of the repository, which is used to identify the associated glossary (see *The Glossary* on page 36) and library (see *The Library* on page 39).

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## Checking Documents into the Repository

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You check documents into the repository to share them with others. You must have at least the **Submit** permission on a document (or on one of its packages) to be able to check it into a change list for approval or at least the **Write** permission to make changes directly to the repository version.

1. In the **Local** tab of the Browser, select the documents to check in, then right-click and select **Check In** to open the:
  - Check In Project window - if you selected a project (see *Checking In a Project* on page 292).
  - Check In Document window - if you selected a single model or file (see *Checking In a Model, Resource File, or Other Document* on page 293).
  - Check In Multiple Documents window - if you selected multiple files, the workspace root, or a folder containing multiple files (see *Checking In Multiple Documents* on page 295).
2. Select whether to check into a change list (see *Change Lists* on page 303). You can choose from:
  - **<None>** - [if you have Write permission on the target folder] Allows you to check the item in directly without review.
  - **<New change list>** - To create a new change list to contain the checked in item.
  - **Change list\_xxxx** - To add the item to an existing draft change list. Click the **Properties** tool to the right of this field to access the property sheet of the change list.

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**Note:** If you are checking in a new version of an item that is already contained in a draft change list, then this field is read-only.

---

3. Select any other appropriate parameters (see *Check-In Parameters* on page 297), and click **OK** to check in the document.

If you check into a change list, you can add other documents to it as necessary through other check ins before submitting it (see *Creating, Building, and Submitting a Change List* on page 305). Once the change list has been approved by the reviewers, your changes are integrated into the official repository versions of the models and made available to other users. If an administrator has connected the repository to an SMTP server (see *Connecting to an SMTP Server for Notifications* on page 527) you will receive an email at the moment of submission of your change list and when it is approved, rejected, or returned to you for further revision.

4. If you are checking in a document that is already stored in the repository, the Merge Changes to Repository Document dialog (see *Resolving Conflicts During Check In* on page 299) may open to let you review the differences between your local document and the version in the repository. When you are satisfied, click **OK** to complete the check in.

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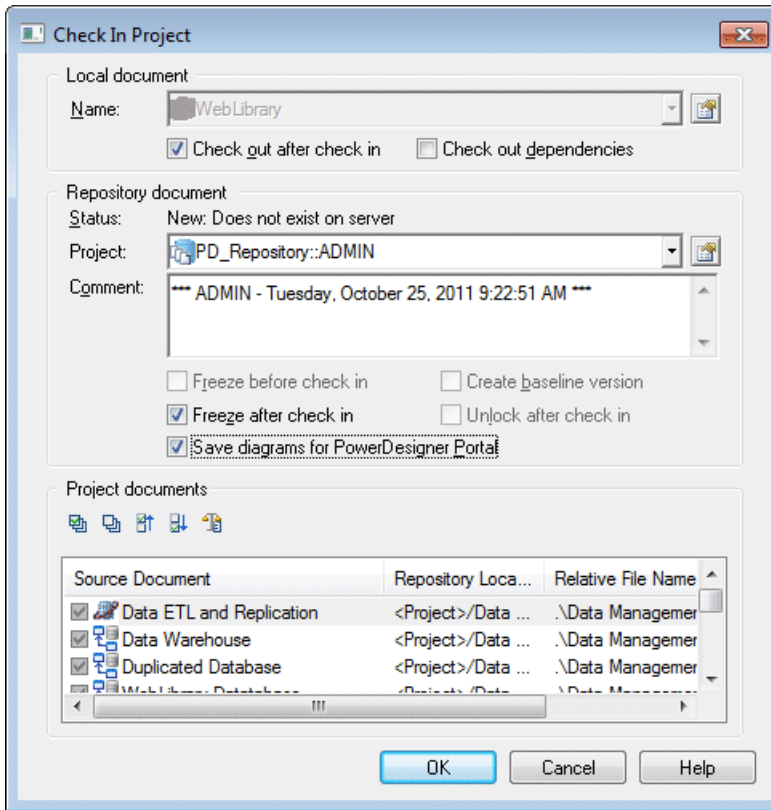
**Note:** If you have changed the target (DBMS, OO language, etc) of the model outside of the target family (such as moving from Oracle 11g to Sybase ASE 15.7), you will not be able to create a new version of the existing repository document and will need to save the model as a new document in the repository.

---

### **Checking In a Project**

The Check In Project dialog guides you through checking in a PowerDesigner modeling project along with all the models and other documents it contains.

You arrive here by right-clicking a Project in the **Local** tab of the Browser, and selecting **Check In**. The dialog is populated with any project documents that have changes. The first time you check in a project, you must check in all its documents; subsequently, only documents with changes are listed and can be deselected if desired.



For information about the parameters available in this dialog, see *Check-In Parameters* on page 297.

## **Checking In a Model, Resource File, or Other Document**

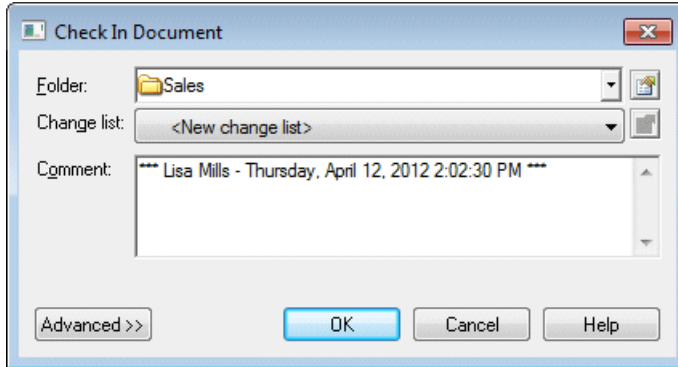
The Check In Document dialog guides you through checking in a PowerDesigner model, resource file, or other document.

You can arrive here by:

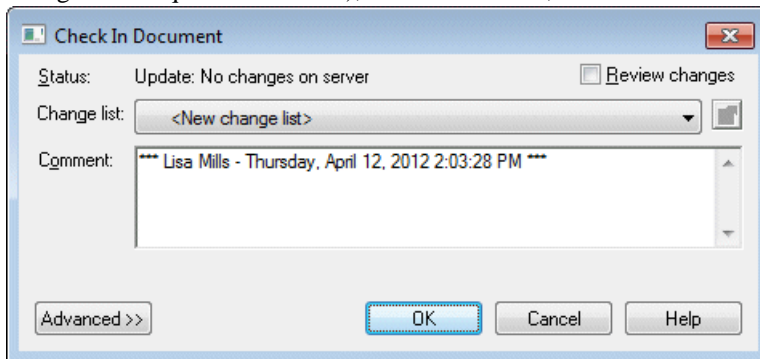
- Right-clicking a model or file in the **Local** tab of the Browser, and selecting **Check In**.
- Selecting a model or file in the Check In Multiple Documents dialog (see *Checking In Multiple Documents* on page 295), and clicking the **Settings** tool.
- Clicking the **Add Document** tool in the Check In Multiple Documents window (see *Checking In Multiple Documents* on page 295). You must specify the model or file to check in in the **Local Document** group box.
- Selecting a resource file, and clicking the **Check In** tool in the resource file list (see *Sharing Resource Files via the Library* on page 551).

Depending on the context, this window can take various forms:

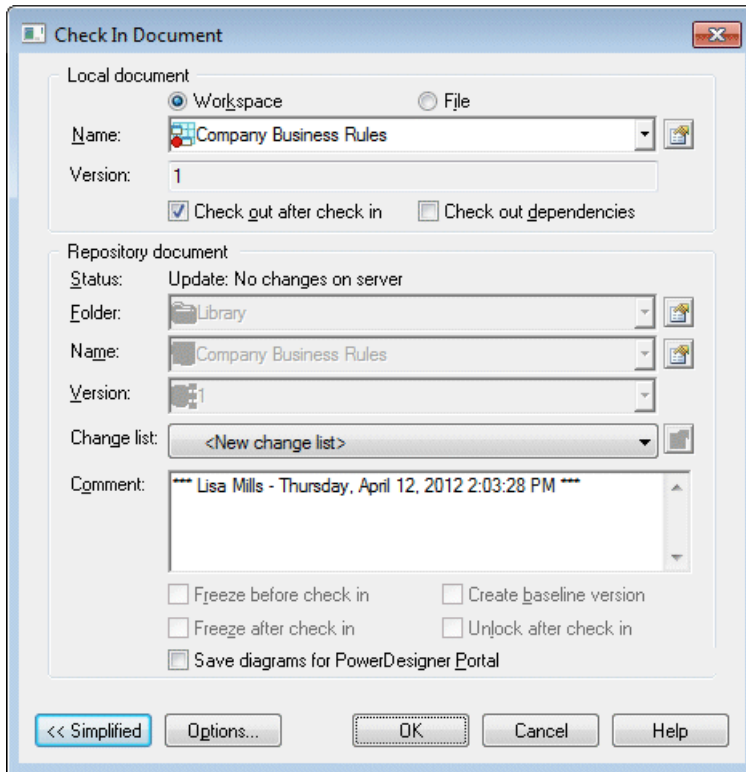
- Simplified (checking in a document for the first time) - Select a folder to check into (and a changelist if required or desired), enter a comment, and click **OK**:



- Simplified (checking in updates to a document already in the repository) - Choose whether to review your changes (see *Resolving Conflicts During Check In* on page 299) (and a changelist if required or desired), enter a comment, and click **OK**:



- Advanced (when you click the **Advanced** button on either of the simplified dialogs):



For information about the parameters available in this dialog, see *Check-In Parameters* on page 297.

## Checking In Multiple Documents

The Check In Multiple Documents dialog is used when you select more than one document for check in.

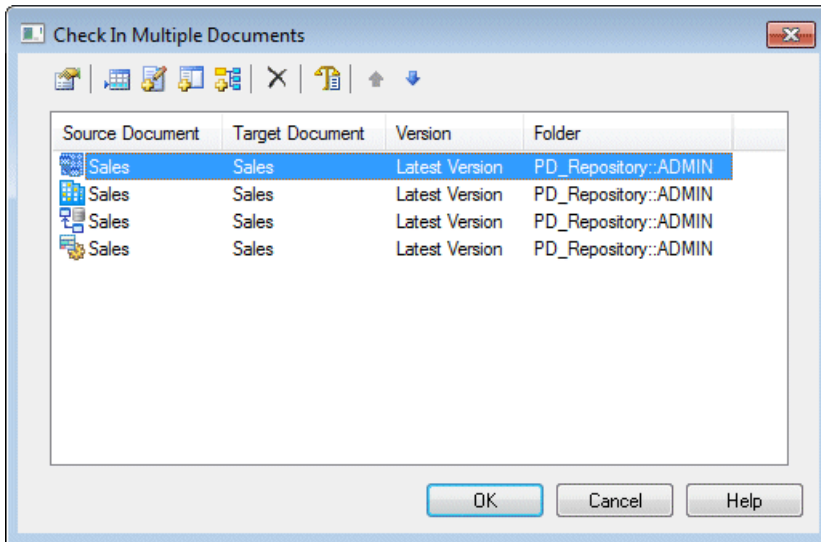
You can arrive here by:

- Right-clicking the workspace root or a folder containing multiple documents (or manually selecting multiple documents) in the **Local** tab of the Browser, and selecting **Check In**.
- Selecting **Repository > Check In** (or pressing **Ctrl+Alt+C**).










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**Note:** You cannot select projects, which themselves contain multiple documents (see *Chapter 3, Projects and Frameworks* on page 47), to check in through this dialog.

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The following tools are available to manage the documents in the list:

Tool	Description
	Settings – Opens the Check In Document window to let you specify check in parameters for the selected document (see <i>Checking In a Model, Resource File, or Other Document</i> on page 293).
	Add Document - Opens the Check In Document window to let you to specify a document to add to the list (see <i>Checking In a Model, Resource File, or Other Document</i> on page 293).
	Add Modified Documents in Workspace - Adds all the documents modified in the workspace during the current session to the list.
	Add All Documents in Workspace - Adds all the documents in the workspace (including closed documents) to the list.
	Add Related Document Versions – Adds all documents related to the selected document through shortcuts or generation or other links to the list. When you check in PowerDesigner models related by shortcuts, the models being referenced are checked in before the models containing the shortcuts.
	Delete – Removes the selected document from the list.
	Check In Options – Opens the Check In Options window to allow you to specify the update mode for changes (see <i>Resolving Conflicts During Check In</i> on page 299).
	Move Up – Moves the selected document up in the list.
	Move Down - Moves the selected document down in the list.



## Check-In Parameters

These check-in parameters allow you to control details of your check in.

**Note:** You can set default values for some of these parameters (see *Repository Options* on page 265). Each check in is processed as one transaction. When you first check in a large model, the server creates large rollback logs and uses a large number of locks, which may require you to configure your server to allow such large transactions. Check ins of subsequent versions use much smaller transactions.

The **Local Document** group box contains the following parameters:

Parameter	Description
Workspace or File	[not for project] Specifies and displays the document name by its workspace name or file name and path.
Name	Specifies the name of the document to check in. Depending on whether you have selected Workspace or File, this is a: <ul style="list-style-type: none"> <li>Model name - click the <b>Properties</b> tool to open its property sheet</li> <li>File name and path - click the <b>Browse</b> tool to open a file selection dialog.</li> </ul>
Version	[not for project – read-only] Specifies the current version of the model or file in the repository, if available.
Change list	Specifies the change list to check the item into (see <i>Change Lists</i> on page 303). You can choose from the following: <ul style="list-style-type: none"> <li>&lt;None&gt; - [if you have Write permission on the target folder] Allows you to check the item in directly without review.</li> <li>&lt;New change list&gt; - To create a new change list to contain the checked in item.</li> <li>Change list_xxxx - To add the item to an existing draft change list. Click the <b>Properties</b> tool to the right of this field to access the property sheet of the change list.</li> </ul> <p><b>Note:</b> If you are checking in a new version of an item that is already contained in a draft change list, then this field is read-only.</p>
Check out after check in	[models and resources only] Updates the local version after check in by checking out the repository version to ensure that you have the most up-to-date version where other users may be working concurrently.

Parameter	Description
Check out dependencies	[projects and models only] Checks out additional information about cross-model dependencies during the check out after check in, to enrich dependencies and impact analysis information in future situations where you may be without a repository connection (see <i>Obtaining Cross-Model Dependencies Without a Repository Connection</i> on page 511).

The **Repository Document** group box contains the following parameters:

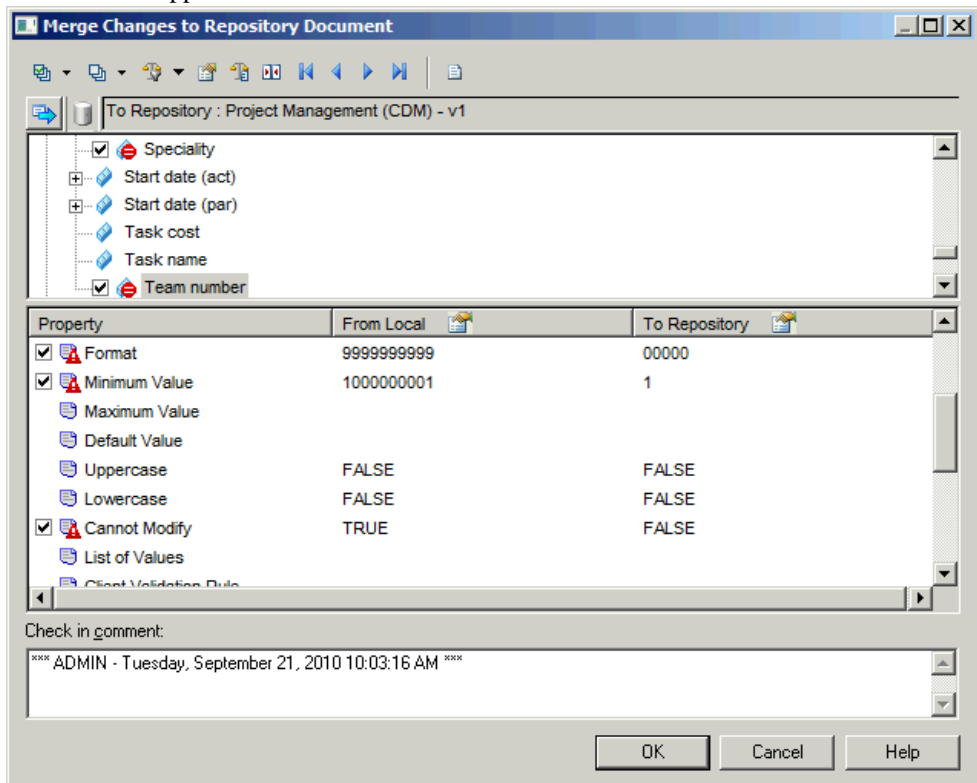
Parameter	Description
Folder/Project	[read-only after first check-in] Specifies the location where the document is checked in. Click the <b>Properties</b> tool to open the property sheet of the folder.  If you do not specify a target folder, the document is checked in at the root of the browser. You should grant individual access permissions to this document.
Name	[not for project – read-only] Specifies the name of the document to apply your changes to. Click the <b>Properties</b> tool to open the property sheet of the document.
Version	[not for project – read-only] Specifies the version of the document to apply your changes to.
Comment	Specifies a comment to describe the purpose of the check in.
Freeze before check in	Freezes the previous versions of any modified objects in the repository, and creates a new version to accept the changes to be checked in (see <i>Freezing and Unfreezing Document Versions</i> on page 320).
Freeze after check in	Freezes all modified object versions after check in to ensure that no further changes can be made to them. Future changes to objects are made to new versions (see <i>Freezing and Unfreezing Document Versions</i> on page 320).
Create baseline version	Creates a completely new version of the model, instead of simply versioning the objects that have changed. This option is available only if you have <b>Full</b> permission on the document. The Merge Changes to Repository Document dialog does not open. Baseline versions may be quicker to check in and out, but they require considerably more disk space than standard versions.  Occasionally, the repository cannot process a standard version; in this situation, you should try to create a baseline version that can be used as a starting point for a new development step.
Unlock after check in	[locked documents only] Unlocks the document version after check in (see <i>Locking and Unlocking Document Versions</i> on page 321).

Parameter	Description
Save diagrams for PowerDesigner Portal	[not for resources] Prepares snapshots of the model diagrams that can be viewed in the PowerDesigner Portal (see <i>Chapter 11, The PowerDesigner Portal</i> on page 337). Dependency matrices cannot be viewed in the Portal.

The **Project Documents** group box lists the model and file documents associated with the project, and lets you select them for check in with the project. Only project documents that are inside the project are listed here. Documents that are outside the project and only attached to it must be checked in separately.

## Resolving Conflicts During Check In

The Merge Changes to Repository Document dialog lets you inspect and approve (or reject) the changes you are checking into the repository. To filter the tree and show only the changes, click the **Change Filter** tool and select **Show All Changes**. By default, all your changes are selected to be applied.



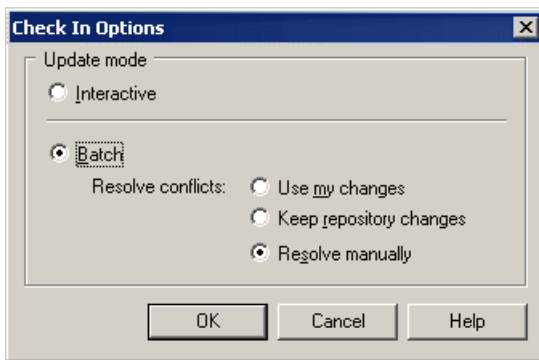
The window is divided in three parts:

- The *Object comparison pane* in the upper part of the window displays the anticipated result of the merge on the target model. Click the **Show Source Model** button at the top left of the pane to split the pane between the source and target models.
- The *Property comparison pane* in the middle of the window displays the properties of the nodes selected in the model tree, listing the name of the property and its values in the From and To models.
- The *Check in comment* pane lets you edit the comment that will be associated with this check in.

For detailed information about using this dialog, see *Merging Models* on page 226.

You can instruct PowerDesigner to handle all or some of these conflicts (and thus suppress the display of the Merge dialog) by deselecting the **Review changes** option in the simplified Check In Document dialog or from the Check In Options dialog, which you open by:

- Clicking the **Options** button at the bottom of the advanced Check In Document dialog.
- Clicking the **Check In Options** tool in the Check In Project or Check In Multiple Documents dialog. The options specified will apply to all the models and files being checked in.



The following modes are available:

- Interactive - [default] Always opens the Merge Changes to Repository Document dialog to let you review and approve or reject each change before check in.
- Batch - Automates the merging of changes and treats conflicts (where the same object has been modified both by you and by another user) using one of the following rules:
  - Use my changes – applies your changes and overwrites changes in the repository version (even if they are to different attributes).
  - Keep repository changes – retains the changes in the repository and rejects your changes (even if they are to different attributes).
  - Resolve manually – opens the Merge Changes to Repository Document dialog to let you review and resolve conflicts.

## **Checking In Packages**

If you check a model into the repository, you also check in the packages it contains.

While, generally, you need the Write or Full permission to check a document into the repository, you can check in a model on which you only have Read permission if it contains at least one package for which you have Write or Full permission. However, note that any edits made to packages for which you do not have Write or Full permission will be lost during check in.

For information about checking out package, see *Checking Out Packages* on page 317.

## **Checking In External Application Documents**

The link between the local document and the repository document is saved in the current workspace. This link allows you to update a document, model or external application file, in the repository.

To be able to update an external application document that does not belong to the current workspace, you have to check the document out from the repository, select the Add to Workspace check box and then save the workspace. This allows you to update the document the next time you check it in.

## **Duplicating Models in the Repository**

If you want to duplicate a model that has been checked into the repository, you must first check it out and then save it as a new model (with a new GUID).

1. Select the model to duplicate in the repository, right-click it, and select **Check Out** to check it out into your local workspace.
2. Select the model in your local workspace and click **File > Save as New Model**.
3. Select an appropriate folder and filename and click **Save** to create the duplicate model.

---

**Note:** The duplicate model replaces the original model in the workspace, but you can verify that the duplication has succeeded by reading the new path in the PowerDesigner window title bar.

---

4. Right-click the duplicate model and select **Check In** to open the Check in Document dialog.
5. Specify the folder to check the model into and any other check-in options (see *Check-In Parameters* on page 297), and click **OK**.

## Undoing a Check In

If you want to undo a check in, you can only delete the document version created by the check in.

Since a check in to the repository does not necessarily create a new document version (see *Freezing and Unfreezing Document Versions* on page 320), such a deletion may not always be possible.

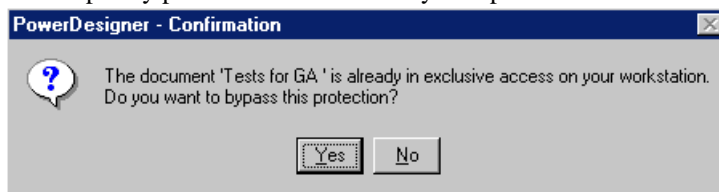
## Temporary Protection for Updates to Repository Documents

When you check in, freeze, lock, or delete a document in the repository, all the versions of the document are protected until the transaction is completed, and other users will receive an error message if they attempt to update the document. For example, you cannot lock a version that another team member is checking in, or freeze a version that someone is locking.



In rare cases, if the connection to the repository is interrupted during an update to a document, the document may remain protected, and you may not be able to update the document in the future until you bypass the protection or cancel the action:

- If the interruption occurred during an operation launched from your workstation (PowerDesigner verifies the machine name, not the connected user), then you can bypass the temporary protection and continue your operation:

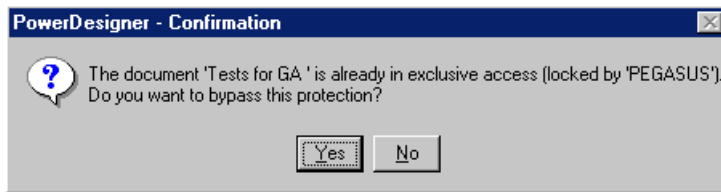


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**Note:** If you have two PowerDesigner sessions running on your workstation and are performing an operation on a document in one session, and want to perform another operation on the same document from the second session, then you should wait for the first operation to complete.

---

- If the interruption occurred during an operation launched from another machine, you should ask an administrator to unblock it. The administrator will verify that no other users are currently updating the document and then perform an action on the document (for example, locking it) to display the message box and click **Yes** to release it:



---

**Warning!** Bypassing the protection when you are not entitled to may severely damage the document.

---

## **Moving a Document in the Repository**

You can move a document from one folder to another in the repository by drag and drop. You must have `Full` permission on the document and at least `Write` permission on the folder you are moving it to.

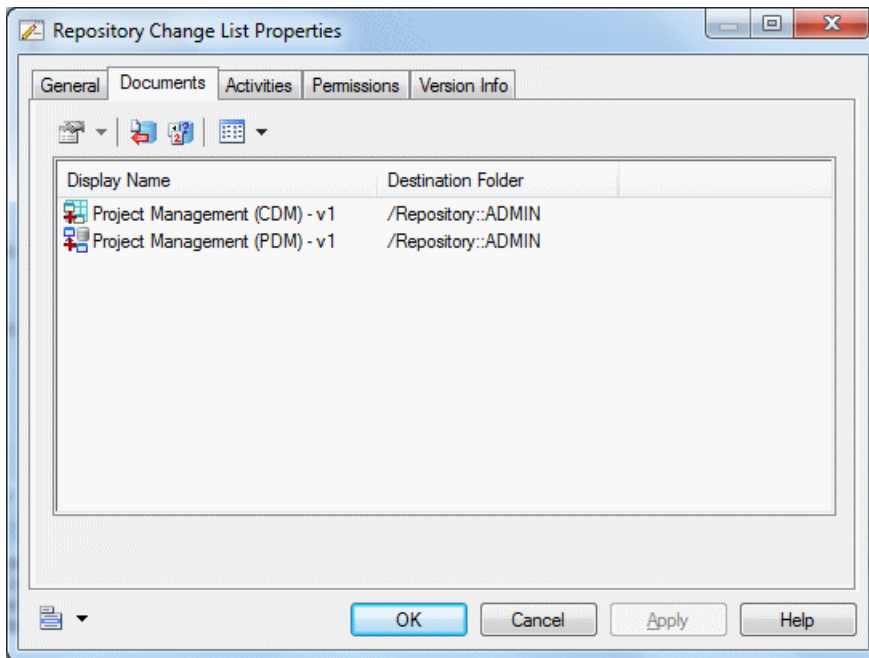
---

**Note:** You can move a document that is not in any branch structure to beneath a branch, but you cannot move a document from beneath a branch to another branch or to outside any branch.

---

## **Change Lists**

Users with the `Submit` permission on a repository folder or model cannot write directly to that location, but must instead check their changes into a change list, to be reviewed by one or more reviewers. You can add one or more models or other documents to a change list all at once or over several check ins. Documents checked into a change list are stored in a special folder in the repository and their contents are not available to other users until they have been approved and integrated into the mainline.

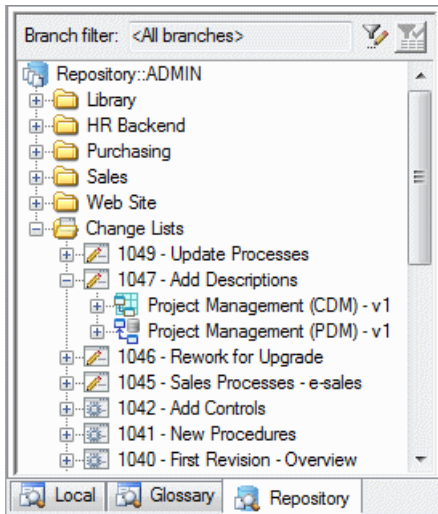


An administrator will determine the policies by which documents can be checked into the repository on a global or folder-by-folder basis (see *Chapter 18, Controlling Repository Access* on page 521). PowerDesigner supports the following kinds of review policy:

- Simple review - Change lists submitted by users with the `Submit` permission are reviewed by a single user with the `Write` or `Full` permission.
- Peer review - Users with the `Write` or `Full` permission voluntarily submit change lists for review.
- Direct check in - The `Submit` permission and change lists are not used, and users all check in changes without review.

You can consult all the open change lists that you have created and those which are awaiting your review under the **Change Lists** folder in the Browser **Repository** tab:





To consult any change list, whether open or closed, containing models for which you have at least Read permission, select **Repository > Change Lists**.

## Creating, Building, and Submitting a Change List

When you check one or more documents into a change list, the change list is created in the repository. You can check further changes to these documents into the change list or add other documents to it. Once you are satisfied with the set of changes contained in your change list, you can submit it for review. After submission, you can no longer edit it.

---

**Note:** If you have only **Submit** permission on a document, you are required to check your changes into a change list, while if you have **Write** permission or higher, you can check the document in directly or choose to create a change list to have your changes reviewed by a peer.

---

1. Choose one or more models, projects, or other documents in your local workspace, right-click them, and select **Check In** (see *Checking Documents into the Repository* on page 291).
2. Choose **New change list** in the **Change list** field, enter a **Comment** to explain your changes, set any other appropriate options (see *Check-In Parameters* on page 297), and click **OK**.

If you are checking in a document that is already stored in the repository, the Merge Changes to Repository Document dialog (see *Resolving Conflicts During Check In* on page 299) may open to let you review the differences between your local document and the version in the repository. When you are satisfied, click **OK** to complete the check in.

The change list is created in the repository, and your model updates are saved to it. You can consult the change list under the **Change Lists** folder in the Browser **Repository** tab, and has a draft icon:



3. [optional] Check in further changes to the documents in your change list or add other documents to it by selecting it in the change list dialog, until you have a complete set of changes that you want to submit for approval.

---

**Note:** The documents that you add to a change list must form a coherent set of changes that can be appropriately reviewed. You can only add documents to a change list if one or more other users has explicit **Write** permission on all the documents included. If you try to add a document that does not share at least one competent reviewer with the documents already included in the change list, then your check in will be canceled and the change list not updated.

---

4. Right-click the change list in the **Repository** tab of the Browser and select **Submit** to open its property sheet.
5. Enter a final comment, and click **Submit** to submit your change list for review.

The icon of the change list changes to show that it has been submitted:



You can no longer edit it or check further changes into it. If an administrator has connected the repository to an SMTP server (see *Connecting to an SMTP Server for Notifications* on page 527), you will receive an email confirming the submission, and any users with **Write** or higher permission on all the documents included in the change list will receive an email inviting them to review it. When the change list is approved, rejected, or returned to you for revision, you will receive a further email.

### Reviewing a Change List

If you have **Write** or higher permission on all the documents included in a change list submitted by another user, then you can review it and determine whether to approve the changes, reject them, or return the change list to the user requesting her to revise it. When you connect to the repository a message in the Output window notifies you if you have change lists to review.

---








**Note:** If an administrator has connected the repository to an SMTP server (see *Connecting to an SMTP Server for Notifications* on page 527), you will receive an email when the user submits the change list, inviting you to review it.

---

1. Open the **Repository** tab of the Browser and expand the Change Lists folder to view all the change lists awaiting your review, which are identified by their "submitted" icon:



2. Double-click a change list to view its properties (see *Change List Properties* on page 310), and read the **Comment** field to understand the reason for the changes.
3. Click the **Documents** tab and review the documents that are included in the change list. The documents in the list display status icons to identify whether further changes have been checked into the mainline version by other users since the change list version was created:

Change List Document Status	No Locks	Mainline Locked by You (Green Padlock)	Mainline Locked by Other (Red Padlock)
Change list creates new document (red cross)		N/A	N/A
Changes in change list version (red checkmark)			
Changes in both change list and mainline versions (yellow exclamation point and red checkmark)			

4. [recommended] Right-click any models that are shown as having subsequent changes on the mainline and select **Update from Mainline** to merge these changes into the change list version (see *Resolving Conflicts During Check In* on page 299).

Merging modifications from the mainline ensures that you are reviewing the change list changes in the most up-to-date context, and will also simplify the approval process.

5. Perform the following actions on a document by right-clicking it or using the toolbar:
  - **Check Out** - Check the submitted version of the document out into your local workspace to review it in more detail (see *Checking Documents Out of the Repository* on page 311).
  - **Compare** - Compare the submitted version of the document in the change list with the mainline version in the repository (see *Comparing Models* on page 223).
  - **Find in Open Change Lists** - Open the List of Change Lists filtered to display only open change lists containing the document.
6. Document your agreement with the changes proposed or explain why you will reject the changes or return them to the submitter for modification in the **Comment** field of the change list.
7. When you have completed your review, if the property sheet of the change list is open, close it in preparation to approve, return, or reject the changes it contains.

## Approving, Returning, or Rejecting a Change List

Once you have reviewed a change list, you can approve it and apply the changes to the mainline, or to reject it or return it to the submitter for modification.

1. Open the **Repository** tab of the Browser and expand the Change Lists folder to view the change list that you want to approve, reject, or return for revision.
2. [recommended] Open the change list property sheet to the **Documents** tab. Right-click any models that are shown as having subsequent changes on the mainline and select **Update from Mainline** to merge these changes into the change list version (see *Resolving Conflicts During Check In* on page 299).

Merging modifications from the mainline ensures that you are reviewing the change list changes in the most up-to-date context, and will also simplify the approval process.

3. If the property sheet of the change list is open, close it, then right-click the change list in the Browser and select:
  - **Approve** - to approve the changes in the included documents and merge them into the mainline to make them available to all users with the necessary permissions. Enter any appropriate final comment and click the **Approve** button. For each PowerDesigner model included in the change list, an Integration dialog is displayed, in which you can review the changes one last time before integrating them into the mainline (see *Resolving Conflicts During Check In* on page 299).

---

**Warning!** Once you begin the approval process, the mainline versions of all the documents in the change list are locked (see *Locking and Unlocking Document Versions* on page 321) to enable the changes to be integrated as a coherent transaction. If you click **Cancel** before having integrated the entirety of the changes in each of the documents, then all the documents will remain locked until you complete the approval process. You can recommence the approval process at any time from the point at which you canceled it.

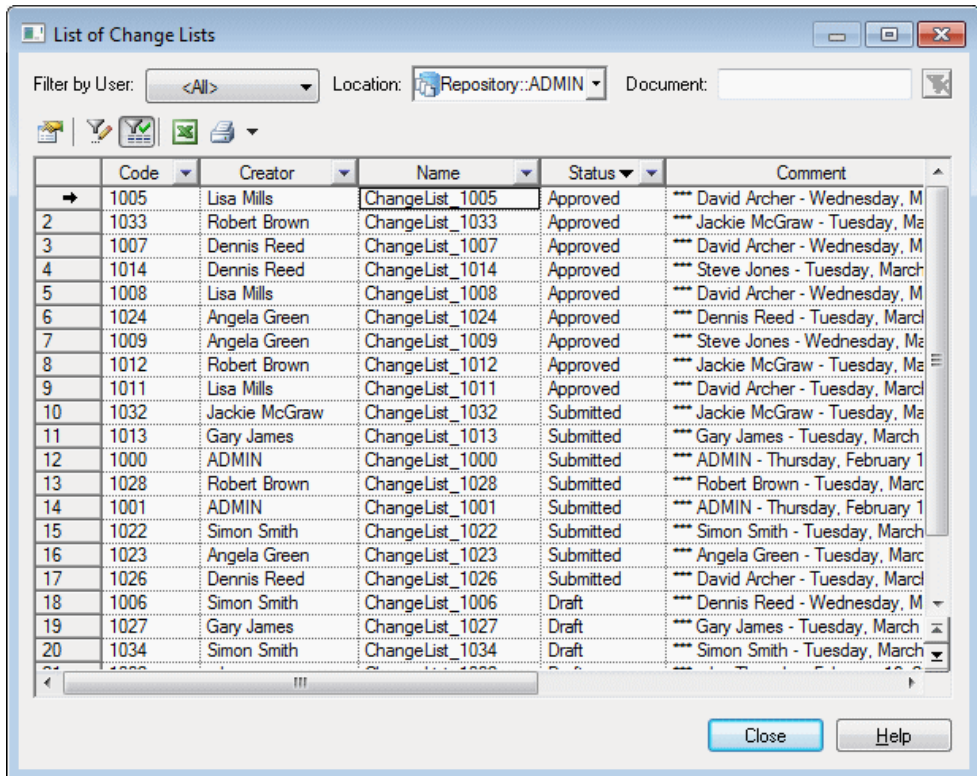
---

- **Return for Revision** - to return the change list to the user with a request to make any changes required for you to approve it. Enter a comment explaining the changes to be made and click the **Return** button.
- **Reject** - to reject the changes submitted in the change list. Enter a comment explaining your reasons for rejecting the change list and click the **Reject** button.

In each case, if an administrator has connected the repository to an SMTP server, the change list owner and any other potential reviewers receive emails notifying them of the approval, rejection, or return of the change list.

## Consulting the List of Change Lists

To consult any change list, whether open or closed, containing models for which you have at least Read permission, select **Repository > Change Lists**.



In addition to the standard in-column filters, this list features the following meta-filters above the list:

- **User** - Shows only change lists for which the selected user is the creator or reviewer.
- **Location** - Shows only change lists containing models or other documents in the selected folder.
- **Document** - Shows only change lists containing documents beginning with the characters entered. The list filters dynamically after you have entered the first few characters.

You can filter on all three criteria in combination and your filter is remembered the next time you open the list. To remove all filters, click the **Clear** button.

**Note:** Though the list displays all relevant results for direct connections to the repository hosted on most DBMSs, when connecting via the proxy or through certain DBMSs, an option is displayed below the list to allow you to restrict the number of results to improve performance:

Displaying first  results

## Change List Properties



Change list property sheets provide information about the change list and give you tools to review the documents it contains.


The **General** tab displays information about the change list itself:

Property	Description
Name / Code	Specify the name and code of the change list. The name is editable, and the change list is listed in the repository browser as <i>code - name</i> (for example 1234 - My Changes).
Comment / Comment History	The comment field contains your comments, including any comments entered when checking in models. The read-only comment history lists the comments entered by all users who have worked with the change list.
Location	Displays the full path to the change list in the repository.
Status	Displays the current status of the change list, which may be: <ul style="list-style-type: none"> <li>• Draft - Not yet submitted for review, or returned for revision.</li> <li>• Submitted - Awaiting review.</li> <li>• Approved - Closed with changes integrated to mainline.</li> <li>• Rejected - Closed with changes rejected.</li> </ul>
Owner	Displays the user who created the change list.

### Documents Tab

The **Documents** tab lists the documents included in the change list. The following management tools are available:

Tool	Description
	Properties - Click the arrow to the right of the tool to open the property sheet of the : <ul style="list-style-type: none"> <li>• Original Mainline Version - the version of the document stored in the mainline at the time of the change list's creation.</li> <li>• Change List Version - the version of the document included in the change list.</li> <li>• Updated Mainline Version - the version of the document stored in the mainline, which includes the changes merged from the change list version.</li> </ul>
	Check Out - Checks out the change list version of the document (see <i>Checking Documents Out of the Repository</i> on page 311).

Tool	Description
	Compare - Opens the Select Models to Compare dialog, initialized to compare the change list version of the selected document with the current mainline version (see <i>Comparing Models in the Repository</i> on page 333).

The following tabs are also available:

- **Activities** - Lists the actions taken on the change list (submission, approval, etc).
- **Permissions** – lists those users and groups with permissions on the change list (see *Granting Access Permissions on Repository Items* on page 534). For draft change lists, the owner has `Full` permission. For submitted change lists, the owner has `Read` permission and reviewers have `Write` permission. For closed change lists, the permissions are restricted to the lowest permission that a user has on all of the included documents.
- **Version Info** - Displays the user who created the change list and the last user to modify it, along with the dates of creation and last modification.

## Checking Documents Out of the Repository

You check out documents from the Repository in order to work on them in your local workspace. You must have at least the `Read` permission on a document (or on one of its packages) to be able to check it out.

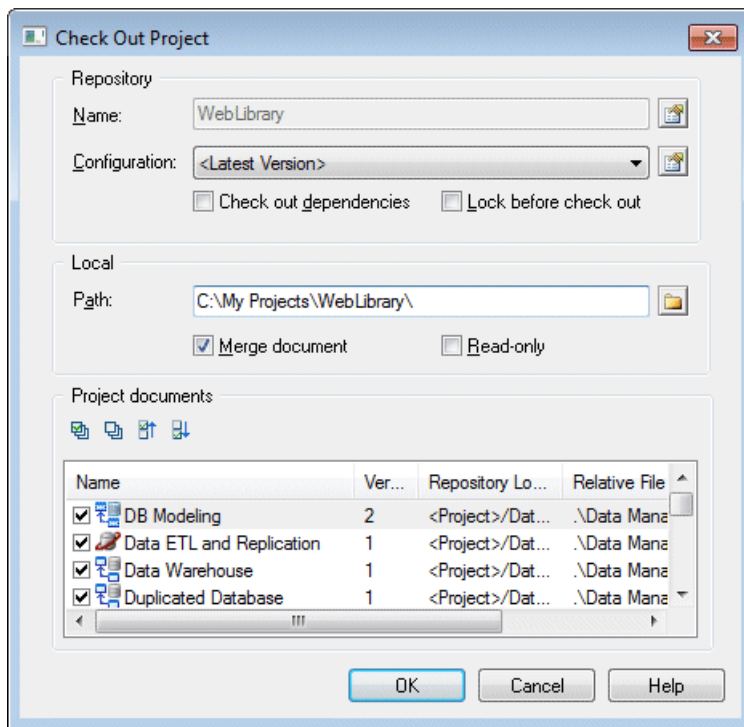
1. To check out a document not currently in your workspace, select the **Repository** tab of the Browser. If you are updating an existing file, select the **Local** tab.
2. Select the documents to check out, then right-click and select **Check Out** to open the:
  - Check Out Project window - if you selected a project (see *Checking out a Project* on page 312).
  - Check Out Document window - if you selected a single model or file (see *Checking Out a Document* on page 312).
  - Check Out Multiple Documents window - if you selected multiple files, the workspace root, or a folder containing multiple files (see *Checking Out Multiple Documents* on page 313).
3. Select the appropriate parameters (see *Checkout Parameters* on page 315), and click **OK** to check out the document.
4. If you are checking out a document that is already present in your workspace (and you have selected the **Merge document** option), the Check Out Document window (see *Resolving Conflicts During Check Out* on page 316) will open to allow you to review the differences between the version in the repository and your local version. When you are satisfied, click **OK** to complete the check out.

## Checking out a Project

The Check Out Project dialog guides you through checking out a PowerDesigner modeling project along with all the models and other documents it contains.

You can arrive here by:

- Right-clicking a project in the **Repository** tab of the Browser, and selecting **Check Out**.
- Right-clicking a project in the **Local** tab of the Browser, and selecting **Update from Repository**.



For information about the parameters available in this dialog, see *Checkout Parameters* on page 315.

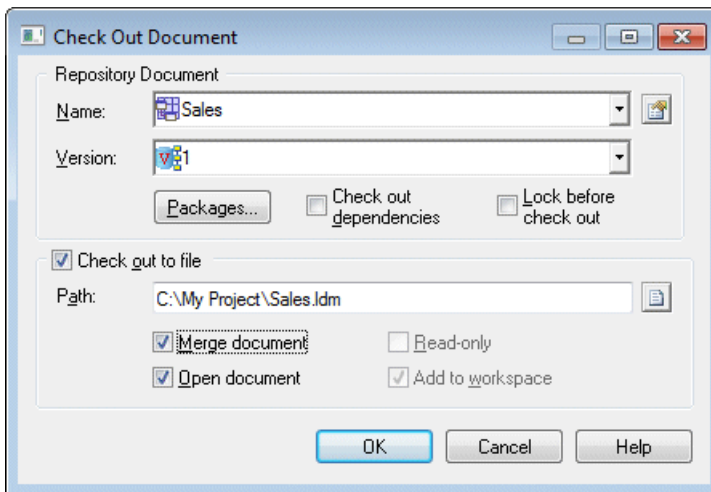
## Checking Out a Document

The Check Out Document dialog guides you through checking out a PowerDesigner model or other document.

You can arrive at this window in any of the following ways:



- Right-clicking a model or file in the **Repository** tab of the Browser and selecting **Check Out**.
- Right-clicking a model or file in the **Local** tab of the Browser and selecting **Update from Repository**.
- Selecting a model or file in the Check Out Multiple Documents window (see *Checking Out Multiple Documents* on page 313) and click the **Settings** tool.
- Clicking the **Add Document** tool in the Check Out Multiple Documents window (see *Checking Out Multiple Documents* on page 313). You must specify the model or file to check out in the **Local Document** group box.
- Select a resource file, and click the **Update from Repository** tool in a resource file list.



For information about the parameters available in this dialog, see *Checkout Parameters* on page 315.

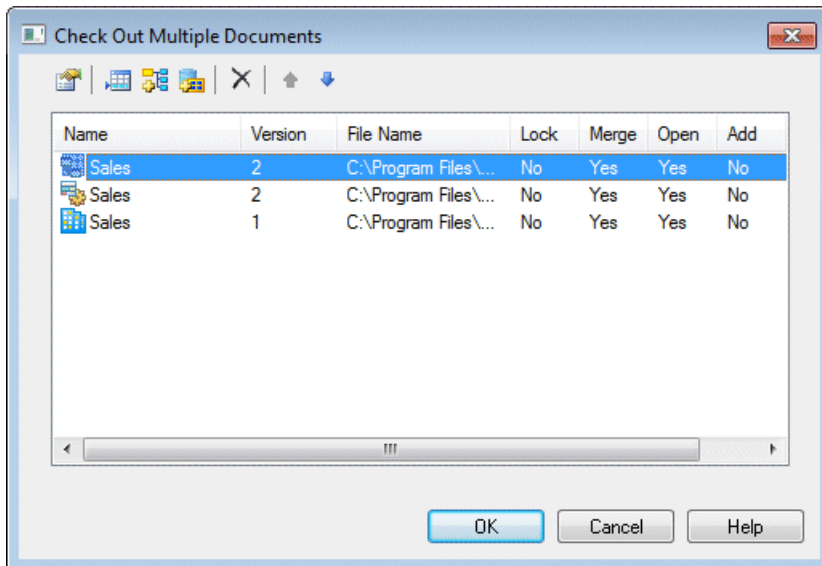
## Checking Out Multiple Documents

The Check Out Multiple Documents dialog is used when you select more than one document for check out.








You can arrive here by:

- Right-clicking the workspace root or a folder containing multiple documents (or manually selecting multiple documents in the **Repository** tab of the Browser, and selecting **Check Out**.
- Right-clicking the workspace root or a folder containing multiple documents (or manually selecting multiple documents in the **Local** tab of the Browser, and selecting **Update from Repository**.
- Selecting **Repository > Check Out** (or pressing **Ctrl+Alt+E**).

**Note:** You cannot select projects, which themselves contain multiple documents (see *Chapter 3, Projects and Frameworks* on page 47), to check out through this dialog.



The following tools are available in this window:

Tool	Description
	Settings – Opens the Check Out Document window to let you specify check out parameters for the selected document (see <i>Checking Out a Document</i> on page 312).
	Add Document Version - Opens the Check Out Document window to let you to specify a document to add to the list (see <i>Checking Out a Document</i> on page 312).
	Add Related Document Versions – Adds all documents related to the selected document through shortcuts or generation links to the check out list.
	Add Document Versions from a Configuration – Opens a selection window allowing you to add all the document versions included in a configuration to the list (see <i>Grouping Document Versions in a Configuration</i> on page 322).
	Delete - Removes the selected document from the list.
	Move Up - Moves the selected document up in the list.
	Move Down - Moves the selected document down in the list.

## Checkout Parameters

The checkout parameters allow you to control details of your check out.

**Note:** You can set default values for some of these parameters (see *Repository Options* on page 265).

The **Repository (Document)** group box contains the following parameters:

Parameter	Description
Name	Specifies the name of the document to be checked out from the repository.
Version	[not for projects] Specifies the version of the document to check out.
Configuration	[projects only] Specifies the configuration containing the project models and files to check out or (if no configuration is specified) the latest project models and files versions held in the repository. You create a project configuration by right-clicking a project node in the Repository tab of the Browser (see <i>Grouping Document Versions in a Configuration</i> on page 322).
Packages	[models only] Click the button to open a package selection dialog box to specify individual packages to check out instead of the entire model (see <i>Checking Out Packages</i> on page 317).
Check out dependencies	[projects and models only] Checks out additional information about cross-model dependencies, to enrich dependency and impact analysis information in future situations where you may be without a repository connection (see <i>Obtaining Cross-Model Dependencies Without a Repository Connection</i> on page 511).
Lock before check out	Locks the selected version of the document before checking it out, to prevent other users from modifying it. This option is available only to users who have the <b>Lock Versions</b> right.

The **Check Out To File** or **Local** group box contains the following parameters:

Parameter	Description
Check out to file	Checks out the model to a file on your local machine. This option can be unselected only for PowerDesigner models, which can be loaded in memory and added to your workspace without creating a file.
Path	Specifies the path of the file or (projects only) folder to which the document will be checked out. Click the <b>Select File</b> tool to the right of this field to browse for a location.

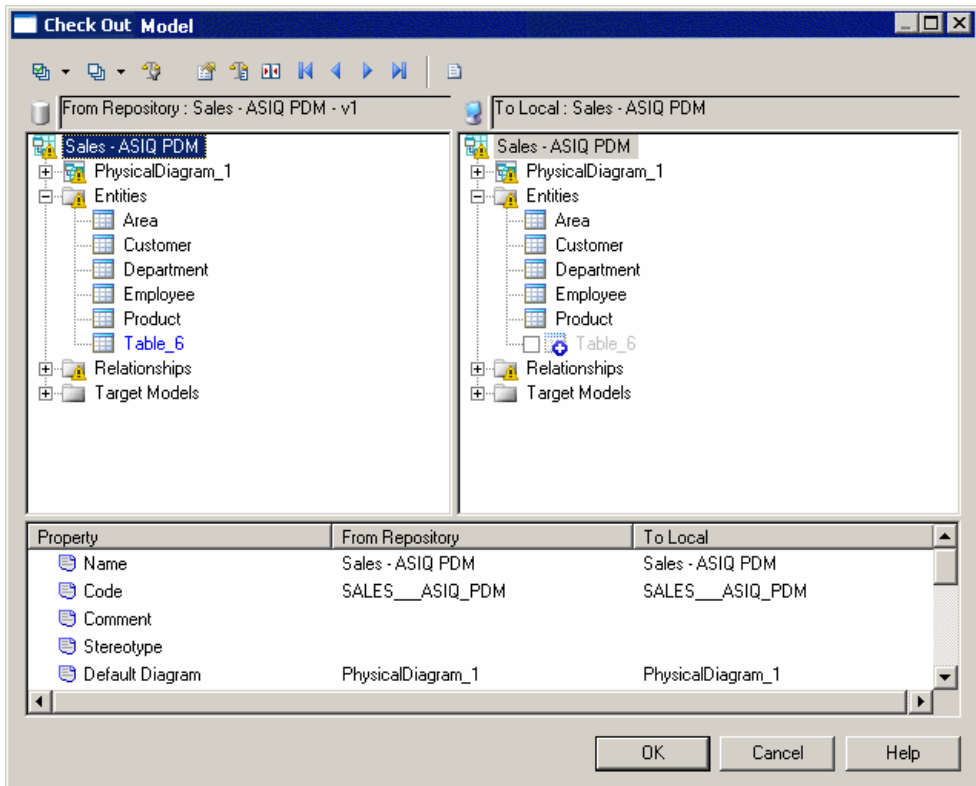
Parameter	Description
Merge document	<p>Opens the Check Out Model window (see <i>Resolving Conflicts During Check Out</i> on page 316), to allow you to compare the local and repository versions of a document, and to review and approve or reject differences for checking out. If you check out multiple documents, they automatically replace the existing document versions, and are not merged with them.</p> <p>This option is available only if you have specified a path to an existing file or folder on your machine.</p>
Read-only	Sets the read-only flag on the file or folder after checking it out.
Open document	[models and files only] Opens the document after checking out, either in the current PowerDesigner workspace or in an external application.
Add to workspace	[models and files only] Adds the checked out document to the current workspace.

The **Project Documents** group box lists the model and file documents associated with the project, and lets you select them to be checked out with the project. Only project documents that are inside the projects are listed here. Documents that are outside the project and only attached to it are not listed and must be checked out separately.

### **Resolving Conflicts During Check Out**

The Merge Changes to Local Document dialog lets you inspect and approve (or reject) all the changes you are checking out of the repository.

This dialog will open if you are checking out a PowerDesigner model to an existing file on your computer and you have selected the **Merge model** option.






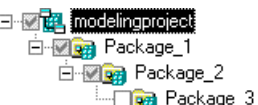
The repository version of the model that you are checking out is displayed in the left pane, and the local version is in the right pane. To filter the tree and show only the changes, click the **Change Filter** tool and select **Show All Changes**. By default, all the changes from the repository are selected to be applied. For detailed information about using this dialog, see *Merging Models* on page 226.

## Checking Out Packages

By default, when you check out a PowerDesigner model, all its packages on which you have Read, Write, or Full permissions are checked out with the model. Packages with List or no permissions cannot be checked out.

If you do not want to check out a complete model, you can select one or more packages to check out from the Select Packages dialog box, which displays the packages on which you have Read, Write, or Full permissions.

If you select a parent package, PowerDesigner automatically extends the selection to sub-packages. If you deselect some sub-packages in the package tree, the selection of the parent packages is grayed to indicate this. If you select a sub-package, PowerDesigner automatically extends the selection to parent packages to preserve the context of the sub-package.

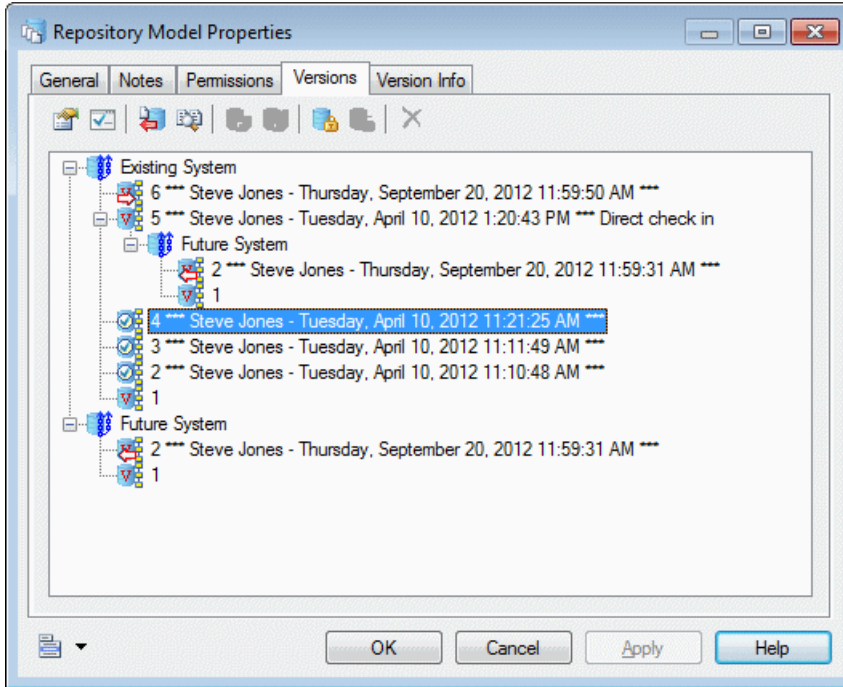
Action	Selection	Impact
Select modelingproject		Package 1, 2, and 3 are automatically selected
Deselect Package 1		Package 2, and 3 are automatically deselected
Select Package 3		Package modelingproject, 1, and 2 are automatically selected
Deselect Package 3		Selection check boxes in package modelingproject, 1, and 2 are grayed

**Note:** When you check out a package containing shortcuts, the package selection is extended to include the target packages referenced by shortcuts even if you do not have the Read permission on these packages.





## Document Versions

The repository provides version tracking for changes made to documents. Details of the current version of the document are displayed on the **Version Info** tab of its repository object

property sheet, and all the previous versions including versions on other branches appear as a tree on the **Versions** tab.










The following version icons can appear on this tab:

Tool	Description
	Branch - You create a new branch in the tree by branching (see <i>Branching Version Trees</i> on page 325).  <b>Note:</b> Branches are displayed twice; both beneath the document version from which the branch was created, and also as a root.
	Version from direct check in - Created directly in the repository without passing by a change list. You create a new version by freezing (see <i>Freezing and Unfreezing Document Versions</i> on page 320).
	Version from change list - Submitted in a change list (see <i>Change Lists</i> on page 303) and approved by a reviewer.
	Version integrated from/to another branch (see <i>Integrating Changes from One Branch to Another</i> on page 328).

In the example above, the document is first checked in directly, and then three versions are checked in via change lists Robert Brown checks in the first version of the document, and Steve Jones checks in a second version which is branched from the Existing System branch to become the first version in the Future System Branch.

The following tools are available on this tab:

Tool	Description
	Properties - Opens the property sheet of the selected version.
	Change List - Opens the property sheet of the change list from which the selected version was approved (see <i>Change Lists</i> on page 303).
	Check Out - Checks out the selected version (see <i>Checking Documents Out of the Repository</i> on page 311).
	Compare - Compares two versions (see <i>Comparing Models in the Repository</i> on page 333).
	Freeze/Unfreeze - Freezes or unfreezes the selected version (see <i>Freezing and Unfreezing Document Versions</i> on page 320).
	Lock/Unlock - Locks or unlocks the selected version (see <i>Locking and Unlocking Document Versions</i> on page 321).
	Delete - Deletes the selected version (see <i>Deleting Documents, Document Versions, and Folders</i> on page 334).

---

**Note:** When you check in a document, the local date is converted to GMT. It is converted again to local time when you check the document out. This is to let you to compare document versions stored in the repository when you are working in different time zones.

---

All repository documents and model objects can be versioned, but repository folders, projects, users, and groups are not versioned. Versions other than the first or baseline version are stored as differences from the previous version. As a rule of thumb, the baseline version of a model stored in the repository takes twice the size as it does when saved as an XML file.

### **Freezing and Unfreezing Document Versions**

Unlike many repository systems, the PowerDesigner repository does not require you to create a new version of a document each time you check it in. You create a version only when you want to, by *freezing* the document.

Freezing a document creates a version in the repository that you can go back to and view its state at the point in time when it was frozen. You could choose to freeze a document (and thus create a new version) each time you check it in, once a day, once a week, or at any other interval.

---

**Note:** To freeze a document, you must have the `Freeze versions` right (see *Granting Rights to Users and Groups* on page 533) and the appropriate permissions on the document.

---

You can freeze a document during check in (see *Checking Documents into the Repository* on page 291) by selecting one or both of the following options:

- **Freeze before check in** - to preserve the state of the model before your changes



- **Freeze after check in** - to preserve the state of the model including your changes (this option can be selected by default if you select the **Freeze after check in** general option (see *Repository Options* on page 265).

If you have the `Write` or `Full` permission on a document that is frozen, you can unfreeze it's most recent version. Unfreezing a document version allows you to make further changes to the existing version, but means that you will no longer be able to go back and view the previously frozen state.

You can freeze a document or unfreeze its latest frozen version at any time by:

- Right-clicking the document, folder, project, or root node and selecting **Freeze** or **Unfreeze**.

---

**Note:** To freeze or unfreeze all the documents inside a folder or branch, right-click it and select **Freeze** or **Unfreeze**. You must have the appropriate permissions on all the contained documents.

---

- By clicking the **Freeze** or **Unfreeze** tool on the property sheet of a:
  - Document - on the **Versions** tab.
  - Configuration - on the **Members** tab.

---



**Note:** You cannot individually control the freezing and versioning of PowerDesigner model objects. Each changed object has its version frozen and version number increased by one each time you freeze its parent model's version.

---

## Locking and Unlocking Document Versions

You can lock a repository document to prevent other users from making changes to it. Only you or a user with the `Full` permission on the document can check in changes to the document until you unlock it. Generally, you will release the lock when you check in the document.

Locked documents display a lock icon in the repository browser:

Icon	Description	Icon	Description
	Blue, if you have set the lock.		Red, if another user has set the lock.

---

**Note:** To lock a document, you must have the `Lock versions` right (see *Granting Rights to Users and Groups* on page 533) and the appropriate permissions on the document.

---

You can lock a document during check out (see *Checking Documents Out of the Repository* on page 311) by selecting the **Lock before check out** option, and remove the lock during check-in (see *Checking Documents into the Repository* on page 291) by selecting the **Unlock after check in** option.

If you have locked a document (or have the `Full` permission on a document locked by another user, you can unlock it. Unlocking a document version allows any user with the appropriate permissions to check in changes to it.

You can lock or unlock a document at any time by






- Right-clicking the document and selecting **Lock** or **Unlock**.

---

**Note:** To lock or unlock all the documents inside a folder or branch, right-click it and select **Lock** or **Unlock**. You must have the appropriate permissions on all the contained documents.

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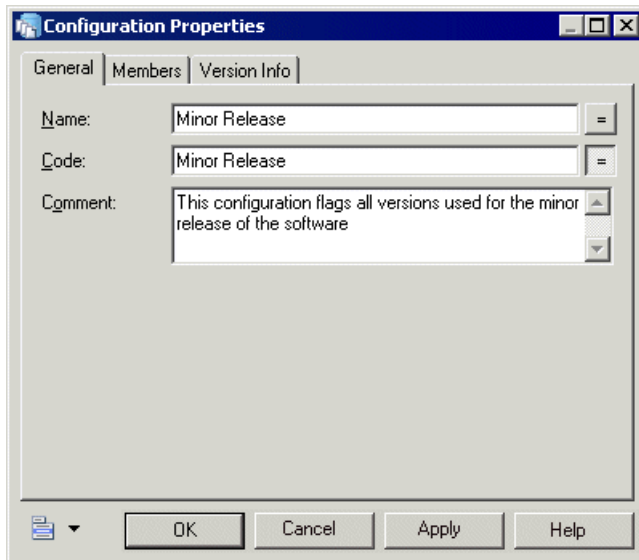
- Clicking the **Lock** or **Unlock** tool on the property sheet of a:
  - Document - on the **Versions** tab.
  - Configuration - on the **Members** tab.
- Selecting **Repository > Administration > Locks** and using the tools available on the List of Locks:

Tool	Description
	Settings – Opens the Lock Document dialog for the selected document, which shows details of the lock upon it.
	Add Lock – Opens the Lock Document dialog. Select a document to lock in the Name list and a comment, and click OK to lock it and return to the List of Locks.
	Add Related Document Versions - [models only] Locks any models that the selected model references through external shortcuts. The related models are automatically added to the List of Locks.
	Add Document Versions from a Configuration – Opens the Select Configuration dialog box, which allows you to select a configuration for locking. Document versions contained within the configuration are locked and added to the List of Locks.
	Delete – Unlocks the selected document, and deletes it from the List of Locks. Note that this tool does not delete the document version.









## Grouping Document Versions in a Configuration

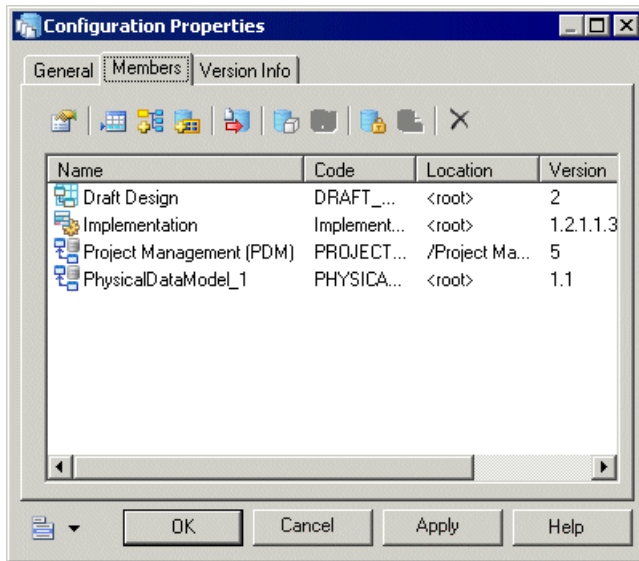
A *configuration* is a container for grouping a set of repository documents versions together to mark a particular point in a project, such as a release or other project milestone. You must have the `Manage Configurations` right to create configurations.

1. Select **Repository > Configurations** to open the List of Configurations.
2. Click the **Add a Row** tool to create a new configuration, and then click the **Properties** tool to open its property sheet.
3. Enter an appropriate Name, Code, and Comment to describe the configuration.



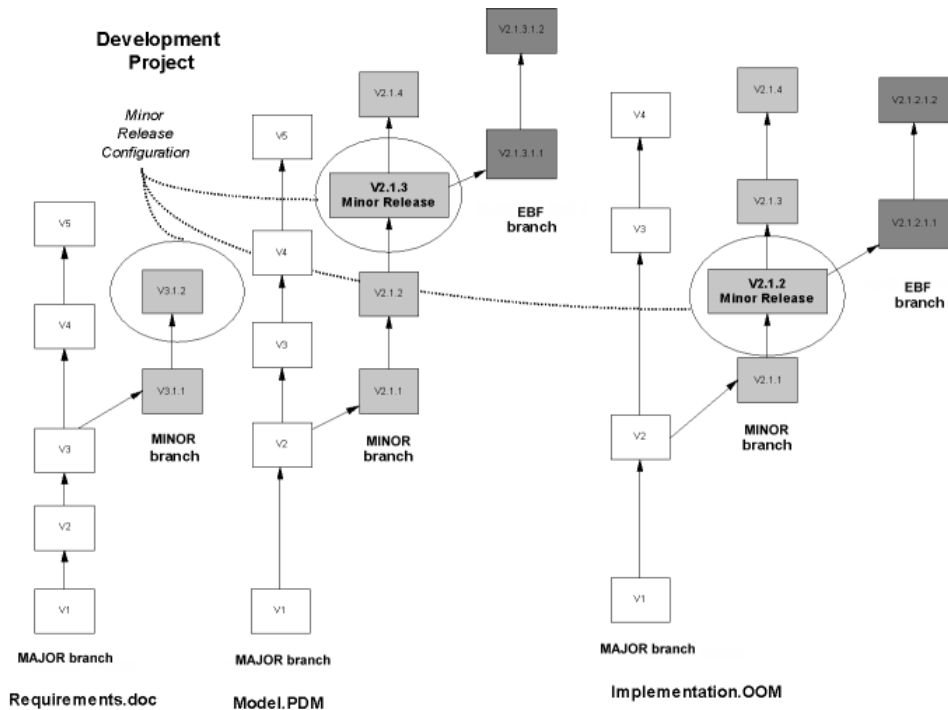
4. Click the **Members** tab to add document versions to the configuration, using the following tools.

Tool	Description
	Properties – Opens the selected repository document property sheet.
	Add Document Version – Opens the Add Document to Configuration dialog, which allows you to specify the version of a document to add to the configuration.
	Add Related Document Versions – [models only] Adds any models that the selected model references through external shortcuts. The related models are automatically added to the configuration.
	Add Document Versions From a Configuration – Opens the Select Configuration dialog, which lets you select a configuration, whose members will be added to the configuration.
	Check Out – Checks out the selected version (see <i>Checking Documents Out of the Repository</i> on page 311).
	Freeze/Unfreeze - Freezes or unfreezes the selected version (see <i>Freezing and Unfreezing Document Versions</i> on page 320).
	Lock/ Unlock - Locks or unlocks the selected version (see <i>Locking and Unlocking Document Versions</i> on page 321).
	Delete – Deletes the selected version from the configuration (see <i>Deleting Documents, Document Versions, and Folders</i> on page 334).



5. Click **OK** to return to the List of Configurations.

In the following example, the versions used for a minor release are included in a configuration called Minor Release:



## **Creating a Configuration from a Project or Folder**

You can quickly create a configuration from the current versions of all the documents in a project or repository folder by right-clicking it and selecting **Create Configuration**.

The property sheet of the new configuration opens. You can modify the default name and add a comment on the **General** tab and modify the document versions it contains on the **Members** tab (see *Grouping Document Versions in a Configuration* on page 322).

## **Checking Out a Configuration**

When you check out a configuration, you check out all the document versions it contains.

1. Select **Repository > Check Out** to open the Check Out Multiple Documents dialog (see *Checking Out Multiple Documents* on page 313).
2. Click the **Add Document Versions from a Configuration** tool, select the configuration to check out, and click **OK** to add the document versions it contains to the list.
3. Click **OK** to check out the documents.

---

**Note:** When you check out a configuration containing resource files, these files may overwrite any modifications in your local resource files. If you need to preserve your changes, modify the path to which the configuration will be checked out.

---

## **Branching Version Trees**

Users with the `Manage Branches` right can create branches in the repository to support concurrent development of multiple versions of documents. Standard permissions control read and write access to individual branches (including integrating changes made in one branch into another).

---

**Note:** Prior to v16.1, the repository browser only supported displaying a single branch at a time. When you upgrade an existing repository to v16.1 or higher, all branches will become, by default, visible for all users. You may wish to simplify viewing the repository by deleting documents and branches that are no longer used, by using permissions to hide certain branches from users or groups who have no need of them, or by migrating active models to a new repository (see *Installation Guide > Installing the Repository > Upgrading the Repository*).

---

You can branch the contents of any folder in the repository, but we strongly recommend creating at least one level of sub-folders beneath the repository root and creating your branches on one of these sub-folders.

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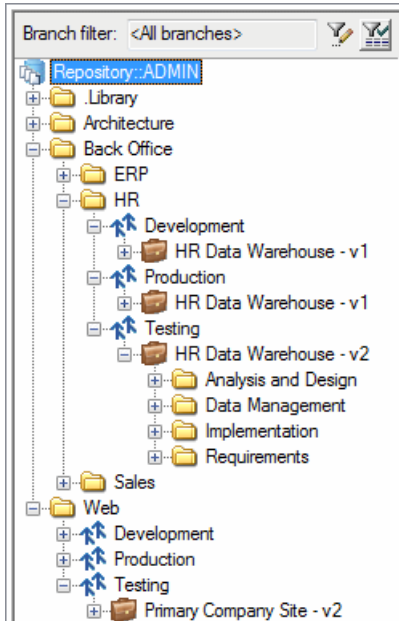
**Warning!** Once you have branched a folder, you cannot add a new folder directly beneath the branched folder as a sibling to the branches, because the entire contents of the folder is now branched and every document and folder must necessarily belong to one or more of the branches. If you branch the repository root, you will not be able to create any other sub-folders

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## CHAPTER 10: The Repository

at the root level and will be constrained to placing all of your repository documents inside a single global branch structure.

---



Branch names must be unique for the folder, but may be reused in another folder. In the example above, three branches (Development, Testing, and Production) are created in the folder /Repository/Back Office/HR, and branches with the same names are also created in the folder /Repository/Web

Users can filter the Browser **Repository** tab to display only the Branches that interest them (see *Browsing the Repository* on page 287).

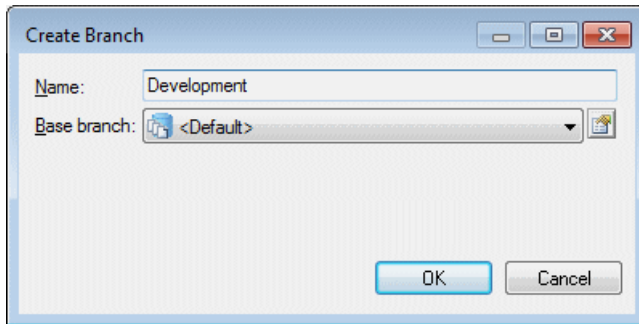
1. Right-click the folder that you want to branch (and on which you have at least Write permission), and select **New > Branch**.

---

**Note:** You cannot create sub-branches under a branch and nor can you create branches inside a project.

---

2. Enter a name for the branch and select a base branch from which to copy the initial contents of the new branch:



The base branch can be any of the sibling branches (or `Default` if this is your first branch in this location), and all the contents of the base branch will be copied to the new branch. Alternatively, you can select `None` to create an empty branch.

The selected base branch is the default branch selected when you integrate items from the new branch to another branch (see *Integrating Changes from One Branch to Another* on page 328).

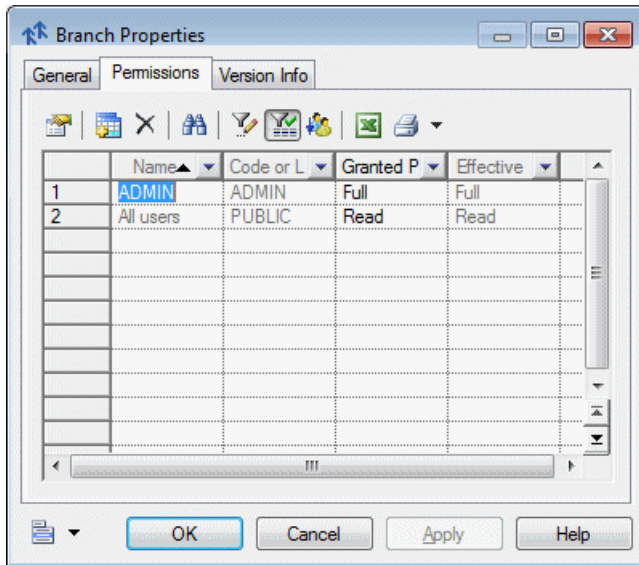
3. Click **OK** to complete the creation of the branch.

The new branch is displayed in the Browser. If it is the first branch created in this location, then a `<Default>` branch is created next to the new branch. You can change the name by right-clicking the branch and selecting **Properties**.

## **Controlling Branch Permissions**

Administrators and users with the `Full` permission on a folder containing branches can grant permissions on the branches from the **Permissions** tab of its repository property sheet.

1. Right-click a branch in the repository browser and select **Permissions** to open the branch property sheet at the **Permissions** tab:



2. Click the **Add** tool to select any users or groups that should have access to the branch for adding to the list, and then click **OK**.
3. Set the **Granted Permission** for each user and group to an appropriate level (see *Granting Access Permissions on Repository Items* on page 534).
4. Select any users or groups in the list that should not have even **List** access to the branch and click the **Delete** tool.

---

**Note:** Users can filter the Browser **Repository** tab to display only the Branches that interest them (see *Browsing the Repository* on page 287).

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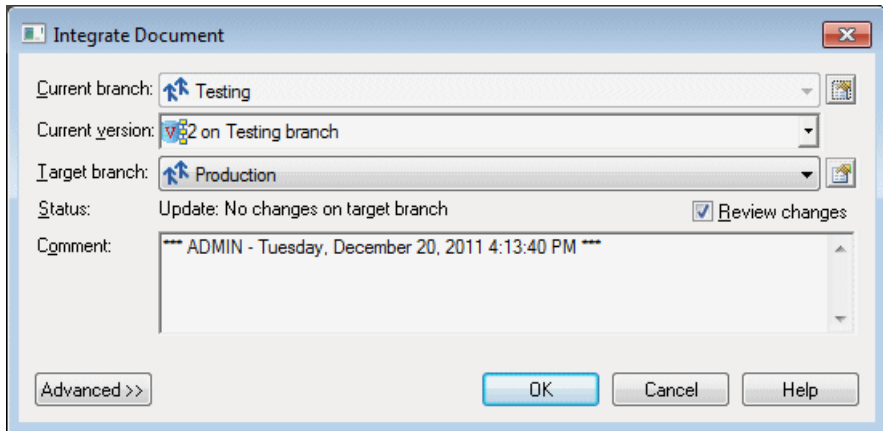
5. Click **OK** to complete the changes to the branch permissions.

## Integrating Changes from One Branch to Another

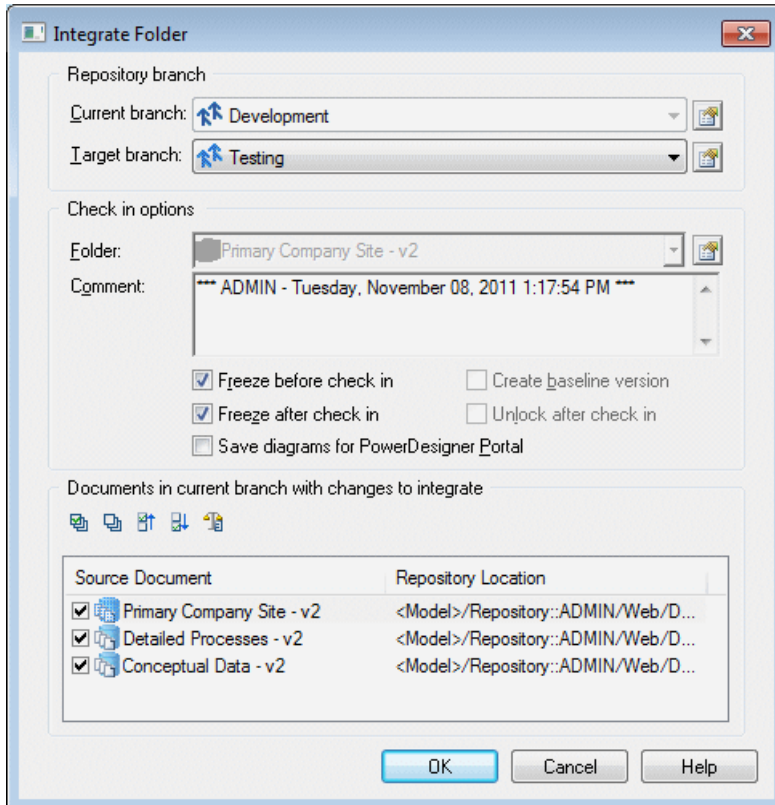
You can integrate changes made to a model or other document (or to a project or the contents of a folder) in one branch to another branch. You must have at least Write permission on the branch to which you want to integrate the changes. You can select individual changes to integrate on an object-by-object basis, and your choices are retained as defaults for subsequent integrations.

1. Right-click the document, project, or folder in the branch containing the changes you want to merge to another sibling branch and select **Integrate**. Depending on the item selected, one of the following dialogs will open:
  - For a single document, you must select the version of the document you want to integrate and the target branch to integrate your changes to. You can optionally enter a comment, and click the **Advanced** button to access the same options as are available in the Check In Document dialog (see *Check-In Parameters* on page 297):





- For a folder or project, you must select a target branch to integrate your changes to and can optionally enter a comment:

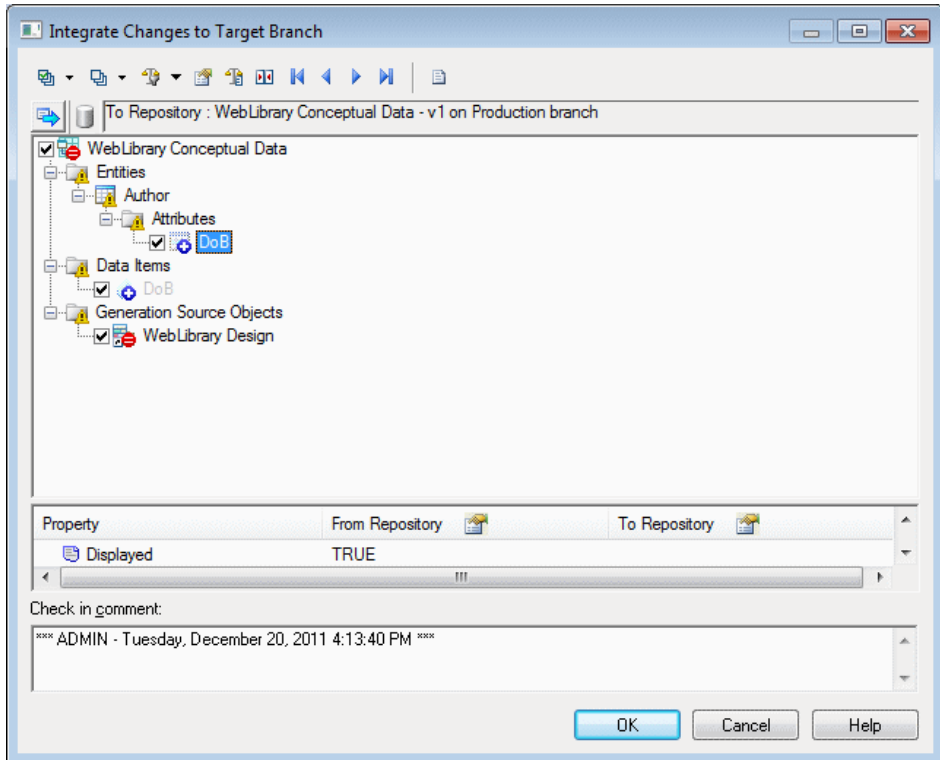


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**Note:** Only documents with changes since the creation of the branch (or the last integration) are listed and you can deselect documents in the list to exclude them from the integration.

---

- Click **OK** to begin merging changes from the current branch to the target branch. For PowerDesigner models, a merge dialog (see *Merging Models* on page 226) opens to allow you to review changes to individual objects:



- Select or reject each change as appropriate and then click **OK** to merge the selected changes from the current branch model to the target branch model.  
If you are integrating a project or folder, an additional merge window will open for each of the models to be integrated, to allow you to inspect and select or reject their changes. When the final model merge window is closed, the integration is complete.

### Deleting a Branch

Administrators and users with the `Manage Branches` right can remove unused branches by right-clicking them and selecting **Delete**.

Before deleting a branch, you must delete all its contents (see *Deleting Documents, Document Versions, and Folders* on page 334).

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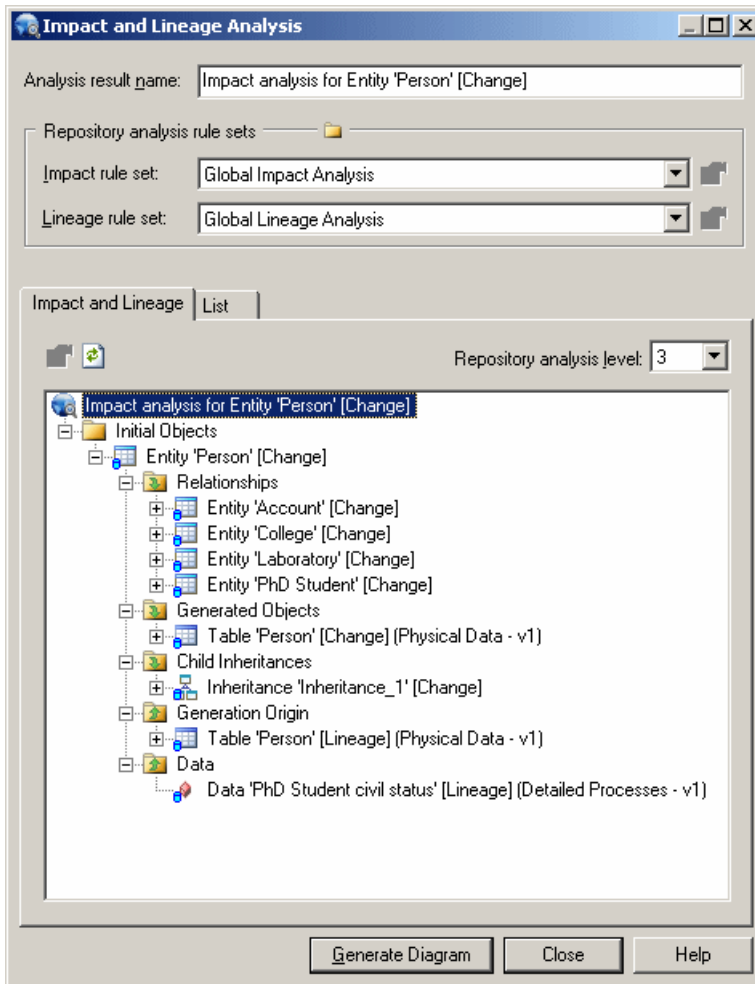
**Warning!** Deleting a branch cannot be undone.

---

## Impact and Lineage Analysis in the Repository

You can analyze the impact of a change to an object (*impact analysis*) and identify the objects that take part in the definition of the object (*lineage analysis*) on any model object in the repository by right-clicking it in the **Repository** tab of the Browser and selecting **Impact and Lineage Analysis**.

By default, the analysis descends to only three levels of dependencies, but you can select more or fewer levels by selecting a number in the **Repository analysis level** list.



For detailed information about using this dialog, see *Chapter 17, Impact and Lineage Analysis* on page 499. For information about the limitations of repository analyses, see *Repository Rule Set Limitations* on page 518.

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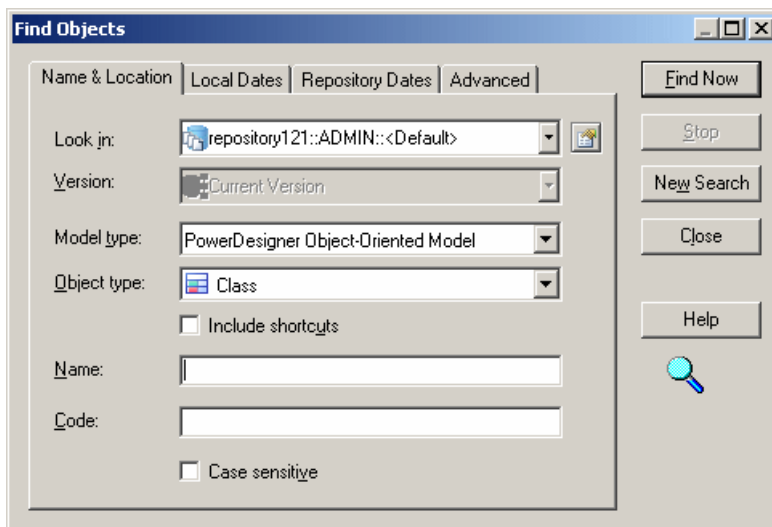
**Note:** By default, analyses launched from the Repository tab use the standard Global Impact Analysis and Global Lineage Analysis rule sets delivered with PowerDesigner and available in the Library folder. You can check additional rule sets into the library or into another repository folder (see *Checking Rule Sets into the Repository* on page 517). To change the folder where PowerDesigner looks for rule sets for selection in the dialog, use the **Choose Path** tool above the rule set fields.

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## Finding Objects in the Repository

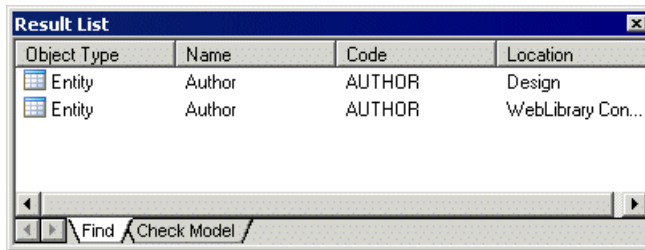
You can search for PowerDesigner model objects in the repository. You do not need special user rights and the List permission is sufficient for searching.

1. Press **Ctrl+Alt+F**, select **Repository > Find Objects**, or right-click the repository root, a folder, or model in the Repository tab of the Browser and select **Find Objects** to open the Find Objects dialog:



2. Specify the appropriate parameters in the different tabs of the dialog box.  
For detailed information about these tabs, see *Find Parameters* on page 128. The repository Find Objects dialog allows you to search by both local and repository dates.
3. Click the **Find Now** button. You can stop the process at any time by clicking the **Stop** button.

Progress is reported in the Output pane, and the dialog remains open until the process completes and the Result List displays the result.



If you right-click an object in the Result list you can select:

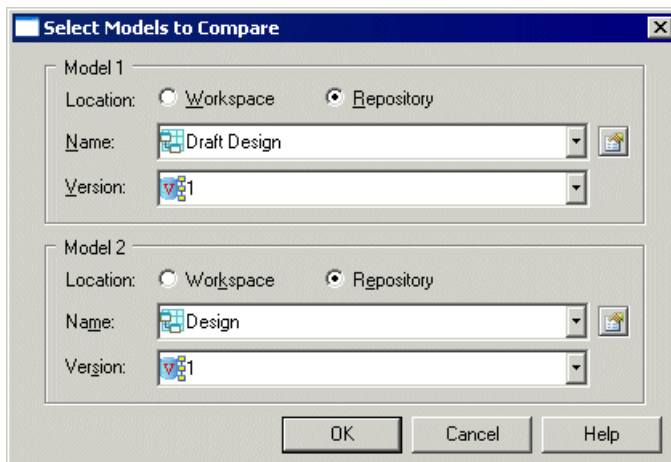
- **Properties** - to display the properties of the found objects.
- **Check Out Model** - to check out the model containing the found object.

## Comparing Models in the Repository

You can compare two PowerDesigner models to obtain a detailed list of the differences between them. You can compare two versions of the same repository model, two different repository models, or one repository model and one local model.

**Warning!** You can only compare models of the same type (for example, PDM, OOM, EAM).

1. Press **Ctrl+Alt+M**, select **Repository > Compare**, or right-click a model in the Repository tab of the Browser, and select **Compare**.

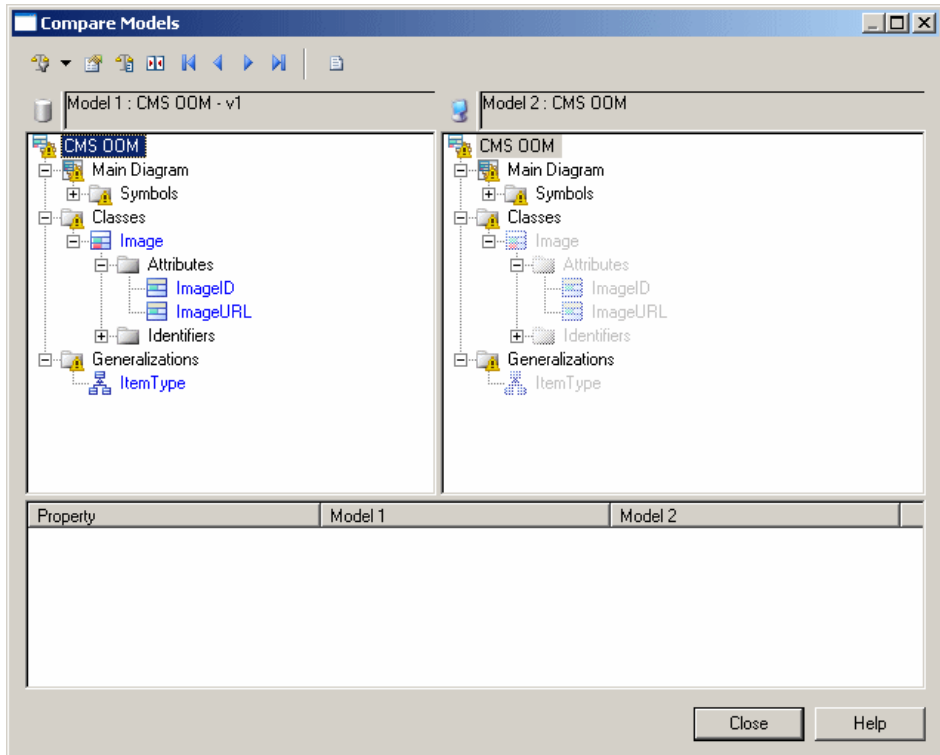


2. For each of **Model 1** and **Model 2**, select:
  - A **Location** to specify whether the model to compare is located in your local workspace or in the repository.

- The **Name** of the model to compare. Click the **Properties** tool to open the property sheet of the selected model. Select the same model in both lists if you want to compare different versions.
- The **Version** of the model to compare – the most recent version is selected by default.

**Note:** The **Version** list includes only the versions in a particular branch (see *Branching Version Trees* on page 325). To select a version in another branch, select the model in the **Name** list and then select a version.

3. Click **OK** to open the Compare Models dialog:



For detailed information about using this dialog, see *Comparing Models* on page 223.

## Deleting Documents, Document Versions, and Folders

If you have the **Full** permission on a document, you can delete the most recent version of the document or delete the document (and all its versions). When you delete a document, you also delete all the objects it contains. If you have **Full** permission on a folder and all its contents, you can delete it and all the versions of all the documents it contains.

---

**Warning!** Deleting a version, document, or folder (see *Repository Folders* on page 288) cannot be undone. If you delete a document that contains objects referenced by shortcuts in other models, these shortcuts will be shown as unresolved.

---

You can delete the latest version of a document by:

- Right-clicking the document in the Browser Repository tab and selecting **Delete Version**.
- Opening the repository document property sheet to the **Versions** tab (see *Document Versions* on page 318), selecting the latest version of the document (or the latest version in a branch), and clicking the **Delete** tool.

To delete all the versions of a document in a branch, right-click the document and select **Delete Document**.

To delete a folder, right-click it and select **Delete**. You must have `Full` permission on the folder and all its contents.





## CHAPTER 11      The PowerDesigner Portal

The PowerDesigner Portal allows you to view the contents of your PowerDesigner repository in your web browser. You can share your models with a wide audience, including those who are not PowerDesigner users. Users with the appropriate rights can edit object descriptions directly in the Browser.

---

**Note:** Before you can access the PowerDesigner Portal, an administrator must install and configure it and provide you with a user name and password. For information about installing the PowerDesigner Portal, see *Installation Guide > Installing the PowerDesigner Portal Server*.

---

For information about the PowerDesigner repository, see *Chapter 10, The Repository* on page 287.

### Logging into the PowerDesigner Portal

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In order to log into the PowerDesigner Portal, you must have a repository user account, and obtain the appropriate address for the site from your administrator. Your administrator must also advise you which connection profile to use to connect to your repository.

1. In your web browser navigate to the web site address provided by your administrator (for example `http://server:3030/cmr`):



The screenshot shows the Sybase PowerDesigner Portal login interface. At the top, there is a blue header bar with the 'SYBASE' logo on the left, the text 'PowerDesigner Portal' in the center, and a database cylinder icon on the right. Below the header, the main content area has a light blue background. It contains the text 'Sign in to Sybase PowerDesigner Portal. To sign in, select a connection profile, enter user name and password.' Below this text is a form with a 'Connection profile:' label and a dropdown menu currently showing 'LOCAL'. There are two links, 'Show profile information' and 'Advanced options', below the dropdown. Further down are input fields for 'User name:' and 'Password:'. To the right of the password field is a 'Ligon' button with a user icon and a 'Help' link.

2. Select the connection profile recommended by your administrator and enter your repository user name and password.

Click **Show profile information** to display details of the selected profile or **Advanced options** to manually enter a host name and port instead of using a profile.

### 3. Click **Logout** to go to the PowerDesigner Portal home page.

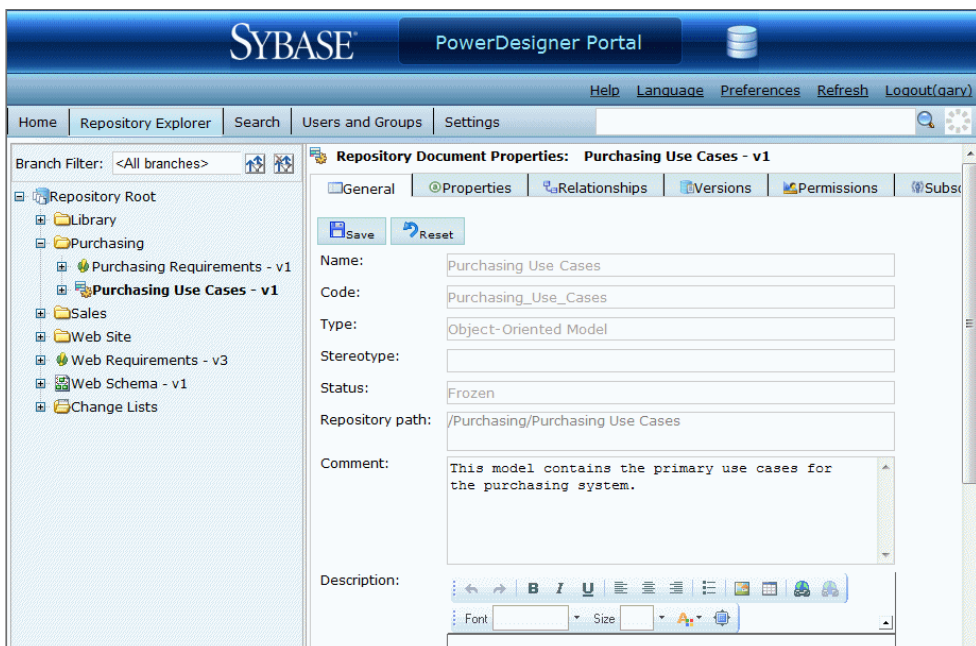
Each PowerDesigner Portal page includes the following links in the top-right corner of the screen:

- Help – to access this help document
- Language – to change the interface language
- Preferences – to review your connection parameters and change your password
- Refresh – to refresh the display
- Logout - to logout

## PowerDesigner Portal Repository Explorer

The Repository Explorer is the main page of the PowerDesigner Portal, which contains a tree view of the contents of the repository ( with a Branch Filter at the top) and, on the right, the properties of the selected item.

To filter the Explorer tree by branch (see *Branching Version Trees* on page 325), click the **Filter by Branch** tool and select the branches you want to view in the **Branch Filter Selection** dialog. The filter works simply by name, so that branch names that are reused in different folders are treated as the same. You can toggle the use of the filter with the **Enable/Disable Branch Filter** tool.



The explorer can contain the following types of node.

- Repository root - Displays the repository name.
- Folders - Subdivide and organize the documents in the repository.
- Branches - Allow concurrent development of multiple versions of documents.
- Projects – Group related models and other documents.
- Documents – Projects, models, multi-model reports, and external application files such as MS Office files, or graphic files.
- Packages - Subdivide and organize model objects in models.
- Object categories - Organize model objects in models.
- Diagrams - Requires that models are checked in with the **Save diagrams for the PowerDesigner Portal** option (see *Check-In Parameters* on page 297). You can click on object symbols in the diagrams to go to the relevant object. Dependency matrices cannot be viewed in the Portal.
- Model objects - Tables, classes, etc.

## **Repository Document and Object Properties**

Click any document or model object in the repository explorer to view its property sheet.

The following tabs are available:

- **General** - displays basic information about the object. Users with the appropriate rights can edit the object comment, description, and annotation. For shortcuts, click the entry in the **Target object** field to open the object that the shortcut references.
- **Properties** - [models, packages, and model objects] displays the properties of the object.
- **Diagram** - [diagrams] displays the diagram. Requires that models are checked in with the **Save diagrams for the PowerDesigner Portal** option (see *Check-In Parameters* on page 297). Click on symbols in the diagram to go to the related object.
- **Sub-objects** - [objects] displays a list of this type of sub-object (for example, table columns, keys, or indexes, or class attributes or operations).
- **Relationships** - [objects] displays lists of the other objects with which the object is related.
- **Versions** - displays the various versions of the document stored in the repository, along with information about the current version of the document, its creation and last modification. For external application files, click the icon in the **Download** column to download the file.
- **Analysis** - displays the impact of a change to the object (impact analysis) and identifies the objects that take part in the definition of the object (lineage analysis) (see *Impact and Lineage Analysis in the PowerDesigner Portal* on page 341).
- **Permissions** - [models, packages and other documents] lists those users and groups with permissions on the document (see *Adding User or Group Permissions for a Repository Item* on page 340).
- **Compare** - [models and objects] allows you to compare different versions of models and objects (see *Comparing Model and Object Versions* on page 341).

- **Subscriptions** - [projects, folders, and models] allows you to subscribe to email notifications of changes to the object (see *Subscribing to Change Notifications* on page 340).

### **Adding User or Group Permissions for a Repository Item**

You can change access permissions on an item from the PowerDesigner Portal.

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**Note:** These permissions can also be controlled through PowerDesigner (see *Granting Access Permissions on Repository Items* on page 534).

---

1. Click the object in the repository explorer to display its property sheet, and then click the **Permissions** tab.
2. Click **Add** to open a selection box listing all the available users and groups.
3. Select one or more users and groups, selecting the appropriate permission for each from the drop down list box in the **Granted Permission** column. The following permissions are available:
  - **List** - View the document or folder in the browser and in search results, and display read-only property sheets. Users who do not have even this permission on an item cannot see it in the repository Browser.
  - **Read** - Additionally compare documents, and check documents out from the repository.
  - **Submit** - Additionally check the document into a changelist for review by a user with **Write** permission.
  - **Write** - Additionally check in (with or without a changelist), freeze, and lock document versions.
  - **Full** - Additionally manage permissions granted to users or groups and remove locks on documents.
4. [optional – for projects, folders, models] Select **Cascade permission changes to folder contents** to apply your changes to children of the node.
5. Click **Save** to save your changes and return to the **Permissions** tab.

The **Granted Permission** column shows the permissions explicitly granted to groups and users, and **Effective Permission** column displays their actual permissions, the most extensive permission granted either explicitly or by way of membership in a group.

### **Subscribing to Change Notifications**

You can subscribe to be notified of changes made to any project, model, external application document, or folder on which you have at least Read permission.

1. Navigate to the project, model, or folder for which you want to subscribe in the Repository Explorer, and then click on the **Subscriptions** tab.

2. Select the Email checkbox against your name in the **Notification Method** column, and then click **Save**.

---

**Note:** If you have the Manage users right, click **New** on the **Subscriptions** tab to open a list of users and groups, select all those whom you want to subscribe to change notifications, and then click **Save**.

---

## **Comparing Model and Object Versions**

You can compare two versions of a PowerDesigner model or object in the PowerDesigner Portal to obtain a detailed list of the differences between them.

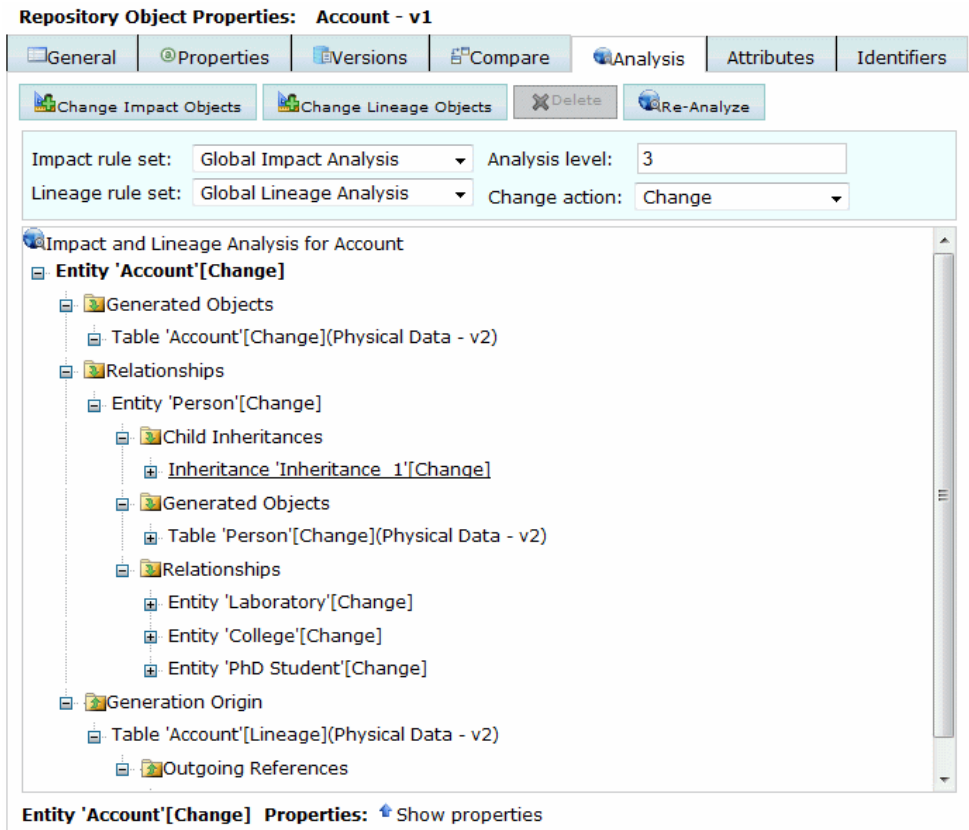
1. Click the object in the repository explorer to display its property sheet, and then click the **Compare** tab.
2. Select the branches and versions numbers of the two versions of the model or object that you want to compare.
3. [optional] Click **Expand All** to open all the nodes.
4. [optional] Click any of the child nodes to view changes to their properties.

For detailed information about working with this feature, see *Comparing Models* on page 223.

## **Impact and Lineage Analysis in the PowerDesigner Portal**

You can analyze the impact of a change to an object (impact analysis) and identify the objects that take part in the definition of the object (lineage analysis) on any model object in the repository by selecting it in the **Repository Explorer** and clicking the **Analysis** tab.

By default, the analysis descends to only three levels of dependencies, but you can select more or fewer levels by selecting a number in the **Analysis level** list.




---

**Note:** By default, impact and lineage analyses launched from the PowerDesigner Portal use rule sets checked into the **Library** folder at the root of the repository.

---

For detailed information about using this feature, see *Chapter 17, Impact and Lineage Analysis* on page 499.

## Editing Object Comments and Descriptions

Users with the **Submit**, **Write**, or higher permission on a model can edit the **Comment**, **Description**, and **Annotation** properties of its objects directly in the PowerDesigner Portal.

---

**Note:** For information about object permissions, see *Adding User or Group Permissions for a Repository Item* on page 340.

---

1. Navigate to the object whose properties you want to edit in the Repository Explorer and select the **General** tab.
2. Make any appropriate modifications directly in the text-only **Comment** field and the RTF **Description** or **Annotation** fields.

The RTF fields provide integrated toolbars to allow you to modify the font (Arial, Comic Sans, Courier New, Tahoma, Times New Roman, and Verdana), font size, and appearance, to change justification and add bulleted lists, images (BMP, JPEG, non-animated GIF, and PNG), tables, and links.

3. Click the **Save** button to save your changes.

---

**Warning!** If you navigate to another object without clicking **Save**, all of your changes will be lost.

---

If you have the `Write` permission or higher, your check in is completed and is immediately available to other users.

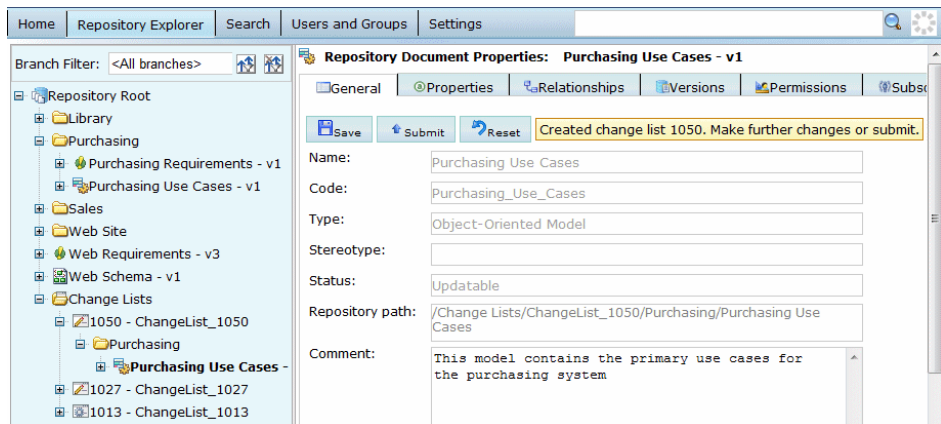
4. [if you have the `Submit` permission] A message box warns that you may not directly submit changes to the model and invites you to create a change list for review. Click **OK** to proceed with creation of the change list.

---

**Note:** If you click **Cancel** your proposed changes will be lost.

---

The change list is created, and the new version of the model is created under the change list.



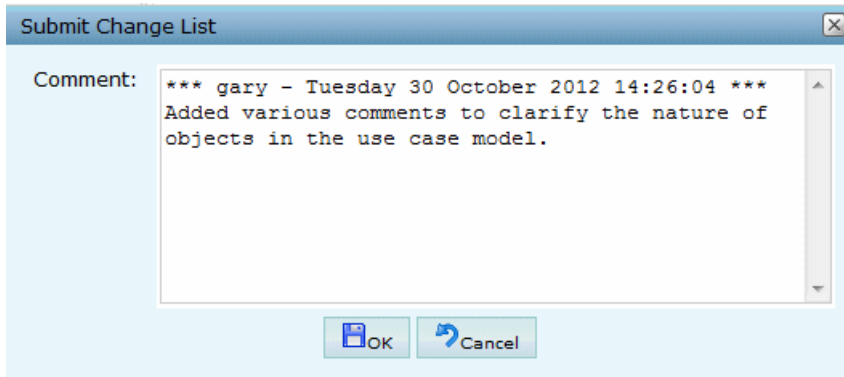
5. [optional] Make further edits to the objects in the model in the change list.

---

**Note:** Only one model can be added to a change list created in the PowerDesigner Portal.

---

6. When all your changes to the model have been completed, click the **Submit** button on the change list or any object in the model, enter a comment to describe the changes contained in the change list, and click **OK**.



The change list is now submitted and you can no longer make edits to the model contained in it. The change list will be reviewed by a user with the `Write` permission or higher and, if approved, integrated into the mainline, where your changes can be seen by other users.

For general information about change lists, see *Change Lists* on page 303.

## PowerDesigner Portal Search

You can search for PowerDesigner model objects in the PowerDesigner Portal via the Search box in the header. You cannot search external application documents. You must have at least the `Read` permission to find objects.

1. Enter your search string in the search field.



The following special operators are supported:

Example	Returns
sales	Objects containing the text sales.
sales AND account (or +sales +account)	Objects containing the text sales and account.
sales AND NOT account (or +sales -account)	Objects containing the text sales but not account.
sales OR account (or sales account)	Objects containing the text sales or account.



Example	Returns
sales~	Objects containing text like sales.
"sales account"	Objects containing the exact string sales account.
sal?s	Objects containing text such as sales or salts (? represents a single wild card character).
sal*s	Objects containing text such as sales or salaries (* represents one or more wild card characters).

2. Click the **Quick search** button to display your results in the **Search** tab:

The screenshot shows the PowerDesigner Portal Search interface. At the top, there is a search bar containing the text "account AND NOT admin" and a "Quick search" button. Below the search bar, there are tabs for "Search in:" and "Advanced search". The "Search in:" tab is selected, and it shows a dropdown menu with "pdf" selected, a "Report" button, and a "Search within Results" button. The "Advanced search" tab is also visible. Below the search bar, there is a table with the following columns: Name, Object Type, Resource Path, and Text View. The table contains 10 rows of search results for the query "account AND NOT admin". The results are as follows:

Name	Object Type	Resource Path	Text View
Account	Table	/Web/Production/Primary Company Site/Physical Data	Code:account Name:Account
Account	Edition	/Web/Testing/Primary Company Site/Web Site	Code:Account Name:Account
Account	Class	/Back Office/HR/Testing/HR Data Warehouse/Implementation/WebLibrary Java Implementation	Name:Account Code:Account
Account	Class	/Back Office/HR/Development/HR Data Warehouse/Implementation/WebLibrary Java Implementation	Code:Account Name:Account
Account	Class	/Back Office/HR/Development/HR Data Warehouse/Analysis and design/WebLibrary Design	Code:Account Name:Account
Account	Article	/Back Office/HR/Testing/HR Data Warehouse/Data Management/Data ETL and Replication	Remote Table:DUPLICATED_ACCOUNT Name:Account Code:ACCOUNT
Account	Entity	/Back Office/HR/Development/HR Data Warehouse/Analysis and design/WebLibrary Conceptual Data	Name:Account Code:ACCOUNT
Account	Class	/Back Office/HR/Testing/HR Data Warehouse/Analysis and Design/WebLibrary Design	Name:Account Code:Account
Account	List	/Web/Development/Primary Company Site/Web Site	Name:Account

At the bottom of the search results, there is a pagination bar showing "Page: 1" and a "Go" button. There is also a "Show properties" button.

Click on a result line to display the object's property sheet.

## Advanced PowerDesigner Portal Search

You can perform searches with more complicated and multiple criteria from the **Search** tab. To use a saved search, click its **Run** button.

The screenshot shows the PowerDesigner Portal Search interface. At the top, there is a search bar with a dropdown menu for "Search name" and a "Filter" button. Below the search bar, there are buttons for "Delete" and "New Search". Below these buttons, there is a section titled "Saved Searches:" which contains a table with the following columns: Search Name, Owner, Search type, Description, and Run. The table contains one row of saved searches:

Search Name	Owner	Search type	Description	Run
Site Project Requirements	ADMIN	Requirements Model:Requirement	Requirements selected for development.	Run

1. Click the **Search** tab and then click **New Search**.
2. [optional] Select a node in the Repository Explorer tree such as a branch, project, or model to restrict the scope of your search. By default, you search the entire repository.

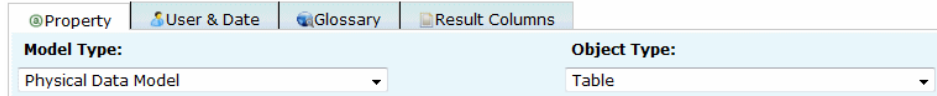
---

**Note:** Searching the entire repository may take a long time. You should, wherever possible, try to restrict the scope of your search.

---

3. [optional] Select a model type and an object type to search. By default, you search all model types and all object types.

In this example, I select **Physical Data Model** and **Table**:



The screenshot shows a search interface with four tabs: 'Property', 'User & Date', 'Glossary', and 'Result Columns'. Below the tabs, there are two dropdown menus. The first is labeled 'Model Type:' and has 'Physical Data Model' selected. The second is labeled 'Object Type:' and has 'Table' selected.

4. Select a property, operator and value to search against. Depending on the property that you select, the choice of operator may be restricted and/or values may be suggested. Note that the case sensitivity of your searches depends on your repository DBMS.

When using the **Contains** operator, the following special characters allow you to use basic regular expressions for text searches:

- \* - none to any number of characters  
For example: W\* finds "Work" and "Washington"
- ? – exactly one character  
For example: ???ER finds "Writer" and "Seller" but not "inner"
- \ - escapes \*, ?, or \
- true/false - Boolean value (True is when the check box is selected in the interface)

5. Click the **Add** button to add the complete search clause to the **Search clause** table.

In this example, I choose to search for tables that are selected for generation:

@Property   User & Date   Glossary   Result Columns

**Model Type:**  
 Physical Data Model

**Object Type:**  
 Table

**Attributes:**

Dimensional Type	ENUM
Element	STRING
End Script	STRING
Generate	BOOL
Initial rows	DOUBLE
Modification Date	DATE
Modifier	STRING

**Values:**  
 true  
false

NOT  
☒ =  
☐ <  
☐ >  
☐ Contains  
☐ IS NULL

Generate = true

+ Add   - Delete   🔍 Search   ☐ Include shortcuts

**Search type:** Physical Data Model:Table

	Attribute	Operator	Value	And/Or
<input type="checkbox"/>	Generate	=	true	

6. [optional] Create additional search clauses and add them to the **Search clause** table, choosing one of the following conjunctions:

- AND – results must satisfy all clauses
- OR – results must satisfy one of the clauses

In this example, I refine my search to look only for tables that are estimated to have more than 100 records:

@Property   User & Date   Glossary   Result Columns

**Model Type:**  
 Physical Data Model

**Object Type:**  
 Table

**Attributes:**

Modification Date	DATE
Modifier	STRING
Name	STRING
Number of Records	DOUBLE
Number of Test Records	INT
Options	STRING
Partition range	INT

**Values:**  
 100

NOT  
☐ =  
☒ <  
☐ >  
☐ Contains  
☐ IS NULL

Number of Records > 100

+ Add   - Delete   🔍 Search   ☐ Include shortcuts

**Search type:** Physical Data Model:Table

	Attribute	Operator	Value	And/Or
<input type="checkbox"/>	Generate	=	true	AND
<input type="checkbox"/>	Number of Records	>	100	

7. [optional] Click the **User & Date** tab and specify additional search clauses based on user names and creation and modification dates.

8. [optional] Click the **Glossary** tab and specify additional search clauses based on glossary objects (terms, related terms, synonyms, and keywords) with which objects may be associated.
9. [optional] Click the **Result Columns** tab and select the columns that you want to display on the result page. By default, only the object type and name are shown.
10. [optional] Select the **Include Shortcuts** check box to include shortcuts to objects in your search results.
11. Click the **Search** button to start your search.

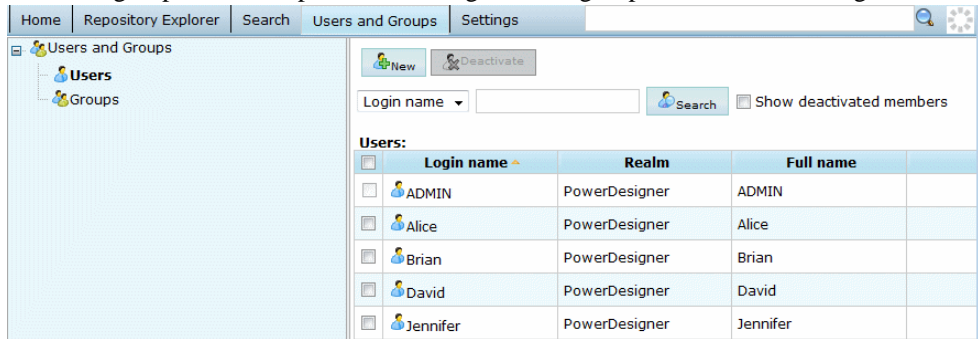
Your search results are displayed. Click on an object to display all its available properties:

<input type="text"/> <input type="button" value="Quick search"/>		
Search in: /		
<input type="button" value="Back"/>	pdf	<input type="button" value="Report"/>
All Properties		<input type="button" value="Search within Results"/>
21 results.		
Name	Object Type	Resource Path
Account	Table	/Web/Production/Primary Company Site/Physical Data
Account	Table	/Web/Testing/Primary Company Site/Physical Data
Account	Table	/Web/Development/Primary Company Site/Physical Data
Matriculation file	Table	/Web/Development/Primary Company Site/Physical Data
Matriculation file	Table	/Web/Production/Primary Company Site/Physical Data
Matriculation file	Table	/Web/Testing/Primary Company Site/Physical Data
Person	Table	/Web/Production/Primary Company Site/Physical Data
Person	Table	/Web/Development/Primary Company Site/Physical Data
Person	Table	/Web/Testing/Primary Company Site/Physical Data
PhD	Table	/Web/Production/Primary Company Site/Physical Data

12. [optional] After performing a search, you can:
  - Select either pdf or xls and click the **Report** button to generate an Excel or PDF version of your results.
  - Select an attribute, enter a value in the search box at the top of the screen and click the **Search within results** button to further refine your search.
  - Click the **Back** button and:
    - Modify your search string.
    - Enter a Saved search name and description and then click the **Save** button to make your search available for reuse on the Search page.

## PowerDesigner Portal Users and Groups

Repository users with the **Manage users** right can view, create, modify, and deactivate users and groups, and manipulate their assignment to groups via the PowerDesigner Portal.



Users and groups can be created here or through PowerDesigner (see *Chapter 18, Controlling Repository Access* on page 521).

### Creating a Repository User

You can create users on the **Users and Groups** tab.

1. Click the **Users and Groups** tab and click on **Users** on the left of the screen to display the list of users.
2. Click **New**, select to create a PowerDesigner or external user, and enter a login name.

**Note:** External users and groups are those for whom authentication is delegated to an LDAP server. Note that remote users and groups can be added to local groups, but local users and groups cannot be added to remote groups.

3. [local users only] Enter a full name, email, and description for the user. An email address is required if the user is to receive change notifications.
4. [optional] Click the **Parent Groups** tab and add the user to any appropriate groups (see *Adding a Member to a Group from the Member's Property Sheet* on page 351).
5. [optional] Click the **Rights** tab and assign the user any appropriate rights (see *Granting Rights to Users and Groups* on page 350).

**Note:** When you create a user, make sure you grant him/her access rights on repository documents, either by inserting this user into a group, or directly. If a user connects to the repository without access rights, he cannot see any documents in the browser.

6. Click **Save** to create the user and return to the list of users.

## **Creating a Repository Group**

You can create groups on the **Users and Groups** tab.

1. Click the **Users and Groups** tab and click on **Groups** on the left of the screen to display the list of groups.
2. Click **New**, select to create a local or remote group, and enter a group and full name.
3. [optional] Enter an email address and/or a description for the group.
4. [optional] Click the **Members** tab and add any appropriate users to the group (see *Adding a Member to a Group from the Group's Property Sheet* on page 351)
5. [optional] Click the **Rights** tab and assign the group any appropriate rights (see *Granting Rights to Users and Groups* on page 350)

---

**Note:** Rights granted to a group are inherited by its members. If a user connects to the repository without access rights, he cannot see any document in the browser.

---

6. Click **Save** to create the group and return to the list of groups.

## **Granting Rights to Users and Groups**

Each repository user and group has a set of *rights* that govern its interactions with the repository. A new user has only the **Connect** right assigned by default, and a new group has no rights. You can assign rights to users and groups on the **Rights** tab of their property sheets.

User and group rights can be associated with permissions on documents to define the actions a user or group can effectively perform on a document.

1. Click the **Users and Groups** tab, select Users or Groups on the left of the screen, and click the appropriate entry in the list to go to its property sheet.
2. Click the **Rights** tab and select the check boxes corresponding to the rights you want to assign. The following rights are available:
  - **Connect** - To connect to the repository.
  - **Freeze** - To freeze document versions.
  - **Lock** - To lock document versions.
  - **Edit PowerDesigner Portal Objects** - To edit objects in a Web browser (see *Editing Object Comments and Descriptions* on page 342).
  - **Manage branches** - To create, modify, and delete branches.
  - **Manage configurations** - To create, modify, and delete configurations.
  - **Manage all objects** - To create, check in, check out, unlock, unfreeze, define permissions, and delete any document version.

---

**Note:** This right is typically granted to data administrators, and implicitly includes **Full** permission on all repository documents to allow them to check in, freeze, lock, and delete any document.

---

- **Manage users** - To create, modify and delete repository users and groups, grant rights to users and groups, and add users or groups to a group.
  - **Manage repository** - To create, upgrade, and delete the repository database.
3. Click **Save** to save your changes and return to the list of users or groups.

### **Adding a Member to a Group from the Member's Property Sheet**

You can add a user or a group to a group from the prospective member's property sheet. When the member is added to the group he will benefit from the rights associated with that group.

1. Click the **Users and Groups** tab, select **Users** or **Groups** on the left of the screen, and click the appropriate entry in the list to go to its property sheet.
2. Click the **Groups** tab to display the list of available groups and the list of groups to which the user or group belongs:

**User properties : gemma**

General Parent Groups Rights Subscriptions Permissions

**Available groups:**  
Select groups to which to add the user.

Name  Search

<input type="checkbox"/>	Group name	Realm
<input type="checkbox"/>	ADMN	PowerDesigner
<input type="checkbox"/>	Development	PowerDesigner
<input type="checkbox"/>	Documentation	PowerDesigner
<input type="checkbox"/>	QA	PowerDesigner

**Parent groups:**  
The user belongs to the following group(s).

Name  Search

<input type="checkbox"/>	Group name
<input type="checkbox"/>	PUBLIC

3. Select one or more groups from the Available groups list, and then click the right-pointing arrow to move them to the Parent groups list.
4. Click **Save** to save your changes and return to the list of users or groups.

### **Adding a Member to a Group from the Group's Property Sheet**

You can add a user or a group to a group from the receiving group property sheet. When the member is added to the group he will benefit from the rights associated with that group.

1. Click the **Users and Groups** tab, select **Groups** on the left of the screen, and click the appropriate entry in the list to go to its property sheet.
2. Click the **Members** tab to display the list of available members and the list of child members:

**Group properties : Development**

Save Reset

General Members Parent Groups Rights Subscriptions Permissions

**Available members:**  
Select members to add to the group.

Name  Search

<input type="checkbox"/>	Name	Realm
<input type="checkbox"/>	ADMIN	PowerDesigner
<input type="checkbox"/>	gemma	PowerDesigner
<input type="checkbox"/>	Marc	PowerDesigner
<input type="checkbox"/>	Olivier	PowerDesigner
<input type="checkbox"/>	rob	PowerDesigner

**Child members:**  
The following member(s) belong to the group.

Name  Search

<input type="checkbox"/>	Name
--------------------------	------

3. Select one or more members from the Available members list, and then click the right-pointing arrow to add them and move them to the Child members list.
4. Click **Save** to save your changes and return to the list of groups.

### Deactivating a User

The repository administrator or a user with the **Manage Users** right can deactivate users, canceling their rights and permissions in the repository. A user cannot deactivate himself.

1. Click the **Users and Groups** tab, and select **Users** on the left of the screen to display the list of users.
2. Select a user in the list, click the **Deactivate** button, and then confirm the deletion by clicking **OK**.

The user remains in the List of Users but his rights and permissions are canceled. Select the **Show deactivated members** checkbox above the list of users to see users who are no longer active. You cannot add a new user with the same username as a deactivated member.

### Deleting a Group

The repository administrator or a user with the **Manage Users** right can delete groups from the repository. When you delete a group you do not delete the members (either users or groups) of the group.

1. Click the **Users and Groups** tab, and select **Groups** on the left of the screen to display the list of groups.
2. Select a group in the list, click the **Delete** button, and then confirm the deletion by clicking **OK**.

The group is removed from the list. Deleting a group has the following effects:

- The users who belonged to the group lose the group rights
- All permissions on documents granted by the group and subscriptions via the group are canceled



- The group is removed from the groups to which it belonged
- The group is no longer displayed in the list of groups

## PowerDesigner Portal Settings

---

The Settings tab lists various parameters that administrators can use to control the server and client components of the PowerDesigner Portal.

### PowerDesigner Portal Client Settings

The PowerDesigner Portal provides a number of client settings that you can modify on the **Settings** page.

#### *Logging*

The following settings allow you to control logging:

Setting	Description
Log file name	Specifies the name to give to the log file.
Log level	Specifies the minimum level of importance for the messages to be written to the log file.
Rollover by	Specifies how the log file should be rolled over. You can choose between: <ul style="list-style-type: none"> <li>• Time/Date – the file rolls over after a certain time. Specify the duration and the format of the log file name in the date pattern field below.</li> <li>• File size – the file rolls over when it reaches a certain size. Specify the maximum file size in the field below.</li> </ul>
Truncate the log file after the server starts	Specifies to create a new log file each time the server is restarted.

To view the log file directly in the browser, select the level of message that you want to view and, optionally, a keyword to search on, and then click the Search button. Click the View button to view the file in a separate window.

#### *SSL Connection*

The following settings allow you to control SSL connections. You must log out and log back in again for changes to take effect:

Setting	Description
Keystore file name	Specifies the name of the keystore file, a database used by the security provider to store public and private key certificates, used by the security socket connection. A default client.keystore file is provided for the test environment.
KeyStore file path	Specifies the path to the keystore file. The default is CMR_HOME/keystore.
TrustStore password	Specifies the TrustStore password, used to access the keystore file. The default for the test environment file is "changeit". We recommend that you change the TrustStore password and regenerate the certificates and keystore files.

### Theme

The following settings allow you to control the look of the site:

Setting	Description
Color theme	Specifies the color scheme used for the site pages.
Logo picture	Specifies the logo image used in the site title bar. Use the <b>Browse</b> button to locate an image to use, and the <b>Upload</b> button to upload it to the site.
Logo title	Specifies the title used in the site title bar.

### Creating a New Color Theme

You can create new color themes for the PowerDesigner Portal. To do so, you will need to be comfortable editing image and css files.

1. Go to `install_dir\Tomcat\webapps\cmr\theme` and make a copy of one of the existing color theme directories to use as the basis of your new theme.
2. Rename the copied directory to the name that you want to see in the Color theme list on the Settings page.
3. Go to `new_theme_dir\images\css-images\dgm` to view all the component images that are used to construct the PowerDesigner Portal site.
4. Open each of the images in turn in your image editor, make appropriate, consistent changes to their color schemes, and then save them back into the folder.
5. Go to `new_theme_dir\css` and open `cmr.css` in your text editor to view the css code that controls the look of other elements of the PowerDesigner Portal site.
6. Make appropriate changes to the background-color and color statements and then save your changes.
7. Navigate to the PowerDesigner Portal site in your Web browser and click the Settings tab. Click **Refresh** to ensure that your changes are taken into account by the server.
8. Click **Settings > Client settings > Theme** and select your new color theme from the list.

9. [optional] Select an image to use as your site logo and enter a new logo title for your site.

10. Click **Save** to apply your changes.

## PowerDesigner Portal Server Settings

The PowerDesigner Portal provides a number of server settings that you can modify on the **Settings** page.

### General

The following general settings are available. You must restart the PowerDesigner Portal for changes to take effect:

Setting	Description
Name	Specifies the name of the repository.
Comment	Describes the repository.
Session timeout (min)	Specifies the amount of time that the browser session is permitted to be idle before it is automatically logged out.
Max users	Specifies the maximum number of users that may connect to the PowerDesigner Portal at any one time.
Object cache size (MB)	Specifies the amount of memory assigned to object caching. The default is 128MB. Increasing this value will improve performance.

### LDAP

The following LDAP settings are available and can be set here or through PowerDesigner (see *Connecting to an LDAP Server for User Authentication* on page 524). You must restart the PowerDesigner Portal for changes to take effect:

Parameter	Description
Server type	<p>Specifies the type of the LDAP server and sets default values for the server. The following types are available:</p> <ul style="list-style-type: none"> <li>Active Directory - if your environment supports anonymous binding, you may be able to connect without further configuration. Click the <b>Test Connection</b> button and follow the instructions on the dialog.</li> <li>Netscape Directory Server</li> <li>OpenLDAP</li> <li>Oracle Directory Server</li> <li>Other</li> </ul> <p>If you edit any parameters and want to revert to the defaults, click the <b>Default Settings</b> button.</p>

Parameter	Description
Provider URL	<p>Specifies the URL for the LDAP provider. By default, for Active Directory, PowerDesigner will automatically detect the nearest LDAP server and use this for authentication, initializing this field to:</p> <pre>LDAP://_ldap.domain:389</pre> <p>For other servers, this field is initialized to:</p> <pre>LDAP://ldap.domain:389</pre> <p>and you should replace <code>ldap</code> with the name or IP address of your LDAP server.</p>
Use Secure Socket Layer (SSL)	<p>Instructs PowerDesigner to connect to the LDAP server using SSL, changing the LDAP provider port to the standard secure 636. If you have deployed the PowerDesigner Portal, you must obtain and register a certificate authority certificate in the Java installation (see <i>Importing an LDAPS Certificate for the PowerDesigner Portal</i> on page 360).</p> <hr/> <p><b>Note:</b> In most corporate environments using Active Directory, the necessary certificate is already registered on client machines. If this is not the case, or for other LDAPS servers, users installing PowerDesigner will need to contact their administrator to obtain a certificate and use <code>\Windows\System32\certmgr.msc</code> to register it. Right-click <b>Trusted Root Certification Authorities</b> and select <b>All Tasks &gt; Import</b>, then follow the wizard instructions.</p> <hr/>
Default search base	<p>Specifies the level at which the query begins its search for users in the LDAP tree. By default this is initialized to the domain components (DCs) of the LDAP server. For example:</p> <pre>dc=sybase, dc=com</pre> <p>You could include the location of the User directory such as <code>OU=Users, dc=devpd, dc=local</code>. If the location of the User directory is not specified here, then you must include it in the <b>Authentication Search Base</b>.</p>
Anonymous bind	<p>[default] Specifies that the LDAP server supports anonymous access. If you deselect this parameter, you must specify a bind user distinguished name (DN) and password for an account that has permissions to query the LDAP server.</p> <hr/> <p><b>Note:</b> If the Bind user DN is in the same DN as the <b>Authentication search base</b> then you can simply enter the user id for the search. Otherwise, you must enter the full DN for that account. For example, if the <b>Default search base</b> is <code>ou=people, dc=Onebridge, dc=qa</code>, and you have a user <code>cn=csitest, cn=users, dc=Onebridge, dc=qa</code>, then the Bind DN must be <code>cn=csitest, cn=users, dc=Onebridge, dc=qa</code>.</p> <hr/>

Parameter	Description
Auto-create user accounts in repository	Specifies that any users corresponding to the LDAP authentication search filter can connect to the repository, and will have an account created for them in the repository when they do so. If you do not select this option, then an administrator must create an account for each user before they can connect.
Search filter	<p>Specifies the LDAP query that selects users for authentication. By default this is initialized to (for Active Directory):</p> <pre>(&amp;(objectClass=person)(userPrincipalName={uid}))</pre> <p>and for other servers:</p> <pre>(&amp;(objectClass=person)(cn={uid}))</pre> <p>To determine an alternative filter, you must know the properties of the users defined in the Active Directory, and which property (for example, name or samAccountName) is being used as the login name.</p>
Search base	Specifies the location of the User list in your LDAP server. By default this is initialized to the same value as the <b>Default search base</b> . If the default search base does not include your users you must specify an appropriate search base here. Users may be in a common node such as <code>cn=Users</code> or an organization unit such as <code>OU=Users</code> . To determine the correct search base, you should use an LDAP browser to look at the full distinguished name of a user. Note that your Bind DN may be a user in a different node in the tree than general users so it is very important that you have the correct information for each.
Search scope	<p>Specifies the scope of the authentication search. You can choose between:</p> <ul style="list-style-type: none"> <li>• subtree - [default] the search begins at the level of the Search base and also searches any subnodes.</li> <li>• onelevel - only the level specified in the the Search base is searched</li> </ul>
Authentication method	<p>Specifies the method to use for authentication requests. You can choose between:</p> <ul style="list-style-type: none"> <li>• simple - [default] clear text authentication. If SSL is enabled, then the password will be encrypted.</li> <li>• DIGEST-MD5 - hashed password authentication. If you select this option, you must specify a digest format.</li> </ul>

### Logging

For information about the Logging settings, see *PowerDesigner Portal Client Settings* on page 353.

*Database*

The following database settings are available. You must restart the PowerDesigner Portal for changes to take effect:

Setting	Description
Database type	Specifies the type of DBMS that hosts the repository.
Database driver	Specifies the driver used to connect to the repository database.
Host	[required] Specifies the name of the host machine for the repository database.
Port	[required] Specifies the port number of the host machine through which the repository database is available.
Database name	Specifies the name of the repository database.
User name	Specifies the database user name that the repository uses to access the DBMS.
Password	Specifies the database password that the repository uses to access the DBMS.
Isolation level	Specifies the isolation level used to isolate transactions in a multi-user environment. By default, level 1 is used for ASA databases and level 2 for ASE. See your DBMS documentation for information about the behavior of each level in your environment.
Initial pool size	Specifies the initial number of connections in the connection pool. The default is 1.
Min idle	Specifies the minimum connection idle time.
Max idle	Specifies the maximum connection idle time.
Max wait (msec)	Specifies the maximum connection wait time.
Max active	Specifies the maximum permitted number of connections to the database.
Charset	[ASE only] Specifies the character set used by the database.

*Search*

The following search settings are available. You must restart the PowerDesigner Portal for changes to take effect:

Setting	Description
Index Information	Specifies the last time the search index was rebuilt, the next time it will be built, its location, size, and the number of attributes indexed.

Setting	Description
Index rebuild interval	Specifies the interval between rebuilds of the search index in minutes. By default, the index is rebuilt every 120 minutes. Click the <b>Rebuild Index</b> button to perform an immediate rebuild.

### Security

The following password policy settings are available and can be set here or through PowerDesigner (see *Defining a Password Policy* on page 528). You must restart the PowerDesigner Portal for changes to take effect:

Setting	Description
Password length	Specifies the minimum and maximum permitted length of passwords. This option cannot be disabled. The minimum length for a password is 6 characters.
Password must contain	Specifies that passwords must contain at least one of each of the character types selected.
Disallow reuse of previous $x$ passwords	Prevents users from reusing the specified number of old passwords.
Enforce changing of passwords after $x$ days	Requires that users change their passwords after the specified number of days.
Block inactive users after $x$ days without connection	Blocks users if they try to log in after the specified number of days of inactivity.
Temporarily block users for $x$ minutes after $y$ failures to log in	Blocks users for the specified number of minutes if they submit an invalid combination of username and password the specified number of times.
Temporary passwords issued by an administrator are valid for $x$ days	Specifies the period for which temporary passwords (which are issued when a user is created or unblocked) are valid. Users attempting to use a temporary password after this time will be blocked.

### Notification

The following change notification settings are available and can be set here or through PowerDesigner (see *Connecting to an SMTP Server for Notifications* on page 527):

Setting	Description
SMTP host	Specifies the host name of the SMTP server used to send mail.
SMTP port	Specifies the port number of the SMTP server used to send mail.

Setting	Description
Sender's email address	Specifies the email address from which to send mails.
Use Secure Socket Layer (SSL)	Specifies to connect to the SMTP mail server through SSL.
Server requires authentication	Specifies that the SMTP server requires authentication. If you select this option, then you must specify an SMTP account and password, and can instruct PowerDesigner to use Secure Password Authentication (SPA).

In addition, you can control the content of notification emails by selecting items in the **Mail template** list and overriding the default text associated with them.

### **Importing an LDAPS Certificate for the PowerDesigner Portal**

If you are required to connect to your LDAP server using SSL, then you must request a certificate from the LDAP server administrator and import it into your PowerDesigner Portal installation. Importing the certificate allows the PowerDesigner Portal to contact the LDAPS server to authorize users wanting to connect.

This procedure explains the process for importing the certificate into the default Tomcat keystore file at `install_dir/keystore/common.keystore`. For security purposes, we recommend that you generate your own key and keystore file. The keystore information is saved in the following file: `install_dir/keystore/config/cmrcommon.xml`.

1. [recommended] Create a backup of the JRE certificates file, `$JAVA_HOME\jre\lib\security\cacerts`.
2. Copy the LDAP server certificate to `$JAVA_HOME\jre\lib\security`.
3. Import the certificate into the keystore with the command:  

```
keytool -import -file certificate_name.pem -keystore cacerts
```
4. Enter the keystore password to complete the import.
5. Restart the PowerDesigner Portal to allow it to obtain the certificate.

### **PowerDesigner Portal Server Status Settings**

The PowerDesigner Portal provides a number of server status settings that you can modify on the **Settings** page.

Setting	Description
Server Information	Displays the host name, port, version, and status of the server, along with the number of users currently logged in. Click the Restart button to restart the PowerDesigner Portal service.



Setting	Description
Change Notification Information	Displays the SMTP host, port, and status of the notification service. Click the Suspend button to suspend the notification service. Click the Resume button to resume the notification service. When resuming, you can optionally select the Include suspended notification items checkbox to send all notifications that would have been sent during the period since the suspension.

## **Troubleshooting the PowerDesigner Portal**

These sections contain information to help you troubleshoot problems with the PowerDesigner Portal.

### **Unicode Encoding with Sybase SQL Anywhere V10**

If you are using a SAP® Sybase® SQL Anywhere® v10 database to store your repository information in a unicode format, you must create the database with the -z option set to an appropriate value.

For example, to create a database to correctly store Japanese characters, you should use the following option:

```
-z 932JPN -zn UTF8BIN
```

For a list of the -z options for all the supported languages, see the SQL Anywhere documentation, available at: <http://sybooks.sybase.com/nav/detail.do?docset=1333>

### **Increasing Tomcat Memory**

By default 256MB of memory is allocated to Tomcat. If you will be browsing large models (20MB or more) or if you anticipate many concurrent users, you may need to increase this amount to 512M or 1GB. See your Tomcat documentation for information about how to modify this allocation.



## CHAPTER 12      **Reports**

PowerDesigner reports allow you to publish information about your models in HTML or RTF format.

You can create the following types of report:

- A *model report* – provides information about all or some of the objects in a model, and is shown in the Browser in the Reports folder beneath its parent model (see *Creating a Model Report* on page 363).
- A *multi-model report* – provides information about one or more models, and is shown in the browser as an independent item, saved as a *.mmr* file (see *Creating a MultiModel Report* on page 376).
- A *list report* – provides information about a single type of object, and is shown in the Browser in the List Reports folder beneath its parent model (see *Creating a List Report* on page 370).

This version of PowerDesigner supports two kinds of model and multi-model reports:

- Legacy reports - use the traditional Report Editor, which is deprecated and will be removed from a future version (see *The Legacy Report Editor* on page 398).
- New format reports - use the new graphical Report Editor, which provides synchronized Design and Outline views, seamless inclusion of model extensions, simplified WYSIWYG formatting, and modernized HTML and RTF generation (see *The Report Editor* on page 377).

---

**Note:** The initial version of the new Report Editor has the following limitations:

- No global selection of objects to display in the report - Define any appropriate selections on object books.
  - Not available in the plugin for Eclipse.
- 

### **Creating a Model Report**

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You can create a model report using the Report Wizard or manually, refine it in the Report Editor, and generate it in HTML or RTF format, or print it at any time.

1. Create the report in your model using the Report Wizard (see *Creating a Report with the Report Wizard* on page 364) or from the list of reports (see *Creating a Report from a Template or an Empty Report* on page 369).
2. [optional] Refine the content and format of your report in the report editor (see *The Report Editor* on page 377).

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**Note:** The report is saved as part of its model. If your model is very large, you may want to create the report as a multi-model report, which is saved separately (see *Creating a MultiModel Report* on page 376).

---

3. Generate the report as HTML or RTF, or print it directly (see *Generating a Model Report* on page 415).

## Creating a Report with the Report Wizard

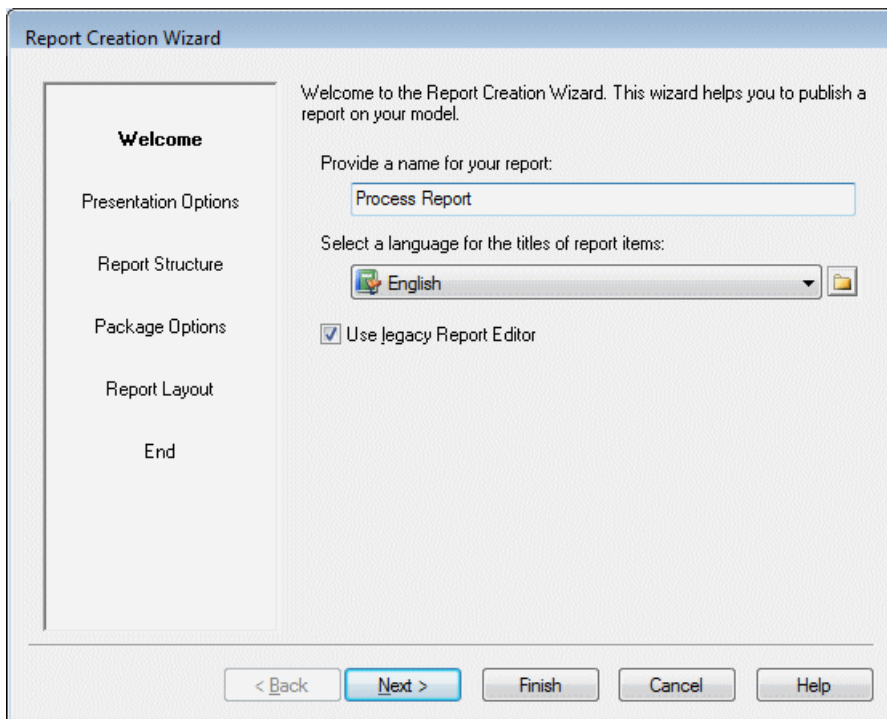
The Report Wizard provides an easy way to create a report, select model objects and format them. The wizard can be launched from your model to create a new report, or from the Report Editor to configure an existing report. You can complete as much of the Wizard as you want. At each step, you click **Next** to advance to the next stage, or **Finish** to create a report based on your selections so far.

1. Select **Report > Report Wizard** (or select **Report > Reports** to open the List of Reports, and then click the **Report Wizard** tool) to launch the wizard.
2. Specify a name for the report and the language in which you want its titles to appear, and then click **Next**.

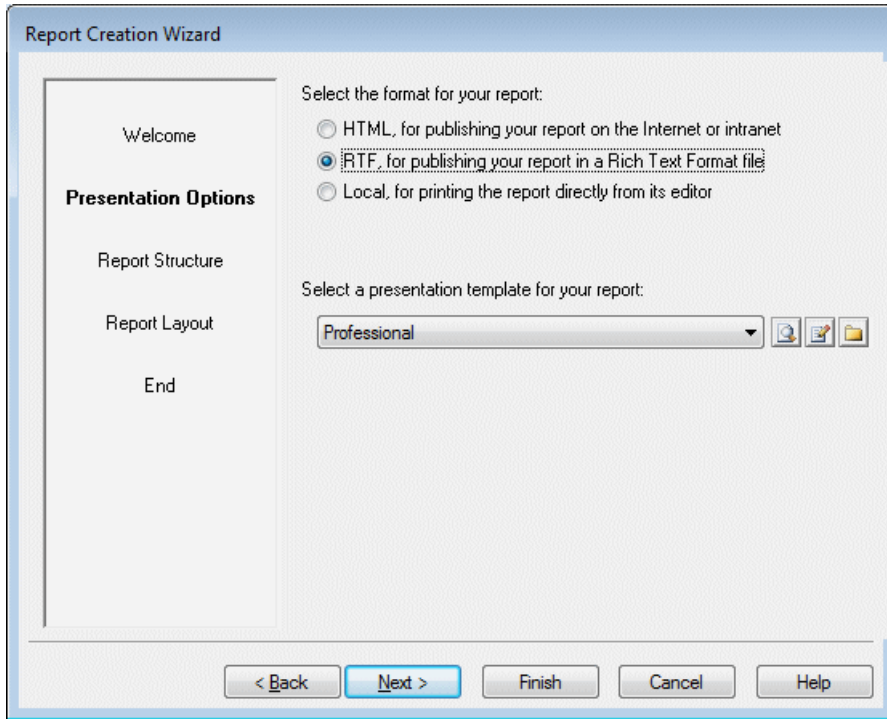
---

**Note:** [optional] To use the new report format and editor (see *The Report Editor* on page 377), deselect **Use legacy Report Editor**.

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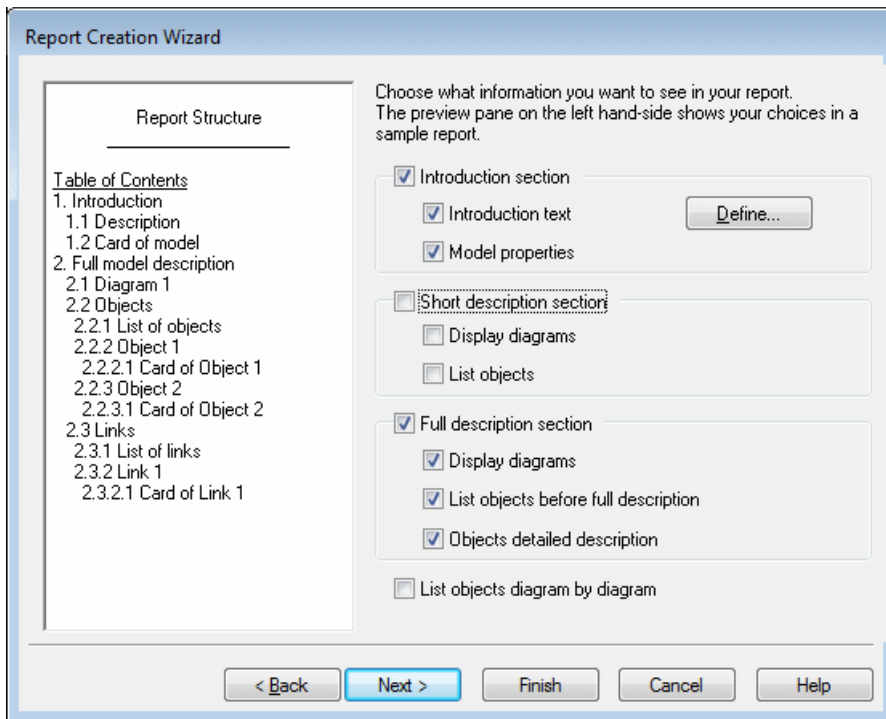


3. Select whether you want to prepare your report for publishing as HTML or RTF, or for direct printing, select a presentation template, and then click **Next**.



**Note:** For HTML and RTF reports, you can use the tools to the right of the template field to preview and edit the template and to change the folder in which to search for templates.

4. Specify the types of information that you want to appear in your report, and click **Next**.



The preview pane on the left hand-side displays a sample report that changes dynamically according to your selections. You can select any or all of the following options:

- **Introduction section** – Inserts a page break followed by an introduction section, which can contain a paragraph of **Introduction text** (click the **Define** button to enter text), and a card listing the **Model properties**.
- **Short description section** – Inserts a page break followed by a short description section, which can **Display diagrams** (including the Diagram book with a picture of each diagram with its description and annotation) and **List objects** (with a list for each type of object in the model).

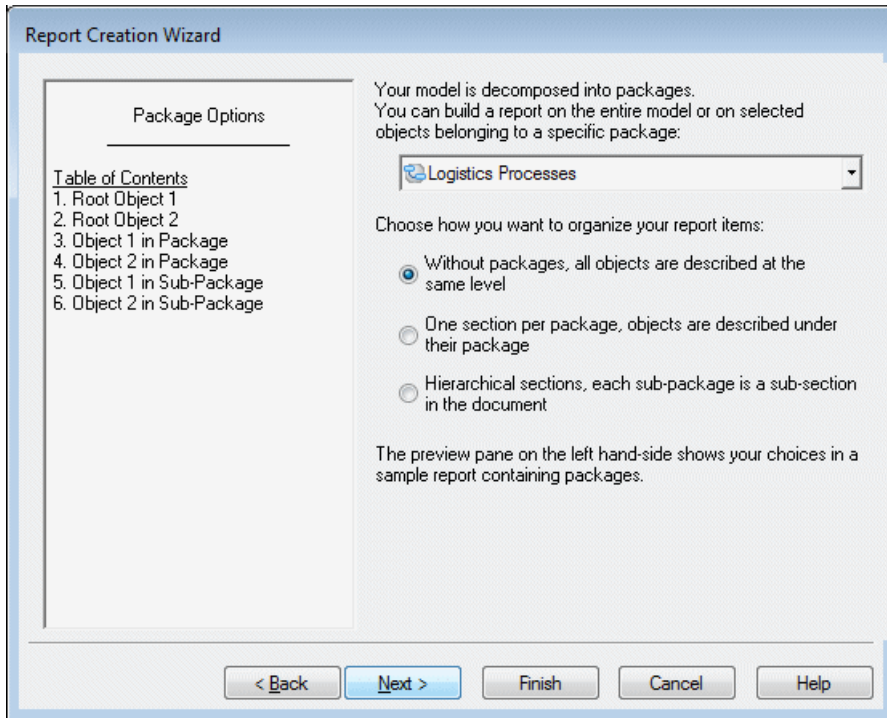
---

**Note:** RQM views are not diagrams and cannot be published graphically.

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- **Full description section** – Inserts a page break followed by a full description section sub-heading, which can display all the elements from the short description section plus the **Objects detailed description** (a book item for each object type).
  - **List objects diagram by diagram** - [except RQM] Instead of a flat display of object types, displays objects sorted by the diagram in which they are displayed. Global objects, such as business rules, do not belong to a specific diagram, and are therefore listed in their own section under the root.
5. [if your model contains packages] Specify whether you will report on the whole model or only a package and whether you will ignore the package structure, or organize objects

under a flat list of packages or a hierarchical list of packages (where sub-packages are children of their parent package), and then click **Next**.



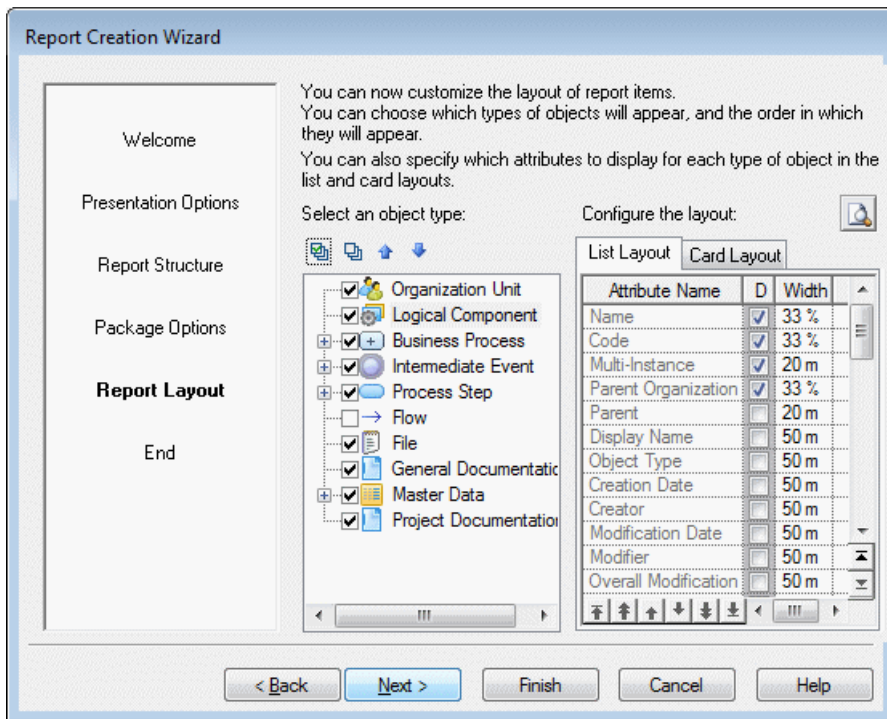
The preview pane (on the left hand-side) changes dynamically in order to preview your selection.

---

**Note:** Global objects, such as business rules, are always included, even if you select a package, and composite objects, such as OOM activities or processes, are always displayed hierarchically, even if you have selected a different package option. Only the hierarchical structure is supported for HTML reports or RQM reports.

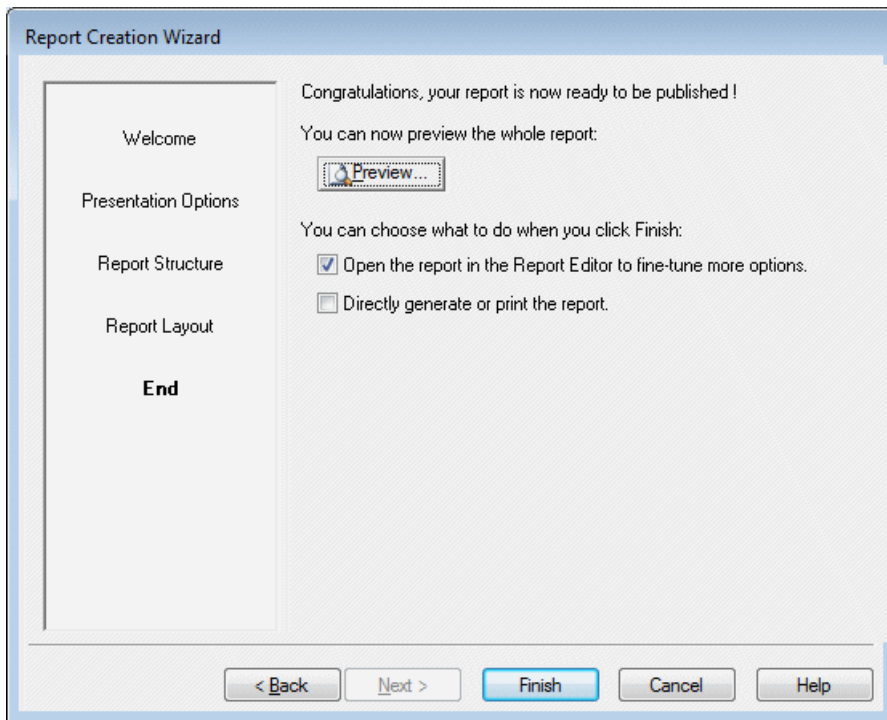
---

6. Specify the types of object that will be included in your report, along with the properties that will be displayed in each of their list and card report items, and then click **Next**.



- To include an object type in the report, select its check box in the list. You must select at least one object type. Click on the plus sign to the left of an object to select sub-objects. Use the **Move Up** and **Move Down** tools to reorder the list (sub-objects cannot leave their parent scope). New types of objects defined in extensions (stereotypes used as metaclasses) are listed after their parent object type.
  - To control the properties included for an object type in lists and cards, select the **List Layout** or **Card Layout** tab and use the following columns
    - **Attribute Name** – Use the arrows at the bottom of the list to reorder the list.
    - **D[isplayed]** – Select the check box to display the attribute.
    - **Width** [List Layout] – Specify the width of the column either as a percentage or in millimeters.
7. Optionally preview your report, and select to open it in the report editor and or directly generate or print it, and then click **Finish**.





## Creating a Report from a Template or an Empty Report

You can create a model report directly from one of the standard report templates without making any object or format selections. Whether you choose a template or create an empty report, you can modify it in the Report Editor.

1. Select **Report > Reports** to open the List of Reports, and click the **New Report** tool.
2. Enter a **Report name**, and select a **Language** for the report's titles and other framing text.
3. [optional] Select a report template from the list to prepopulate the report. The following standard templates are available:
  - **Full** – provides lists of all the types of objects in the model, together with detailed information on each main and sub-object.
  - **List** – provides lists of all the types of objects in the model.
  - **Standard** – provides lists of all the types of objects in the model, together with detailed information on each main object.
  - **<None>** – creates an empty report.

---

**Note:** For more information about report templates, including how to create your own, see *Report Templates* on page 417.

---

4. [optional] To use the new report format and editor (see *The Report Editor* on page 377), deselect **Use legacy Report Editor**.
5. Click **OK** to create the report and open it in the Report Editor (see *The Report Editor* on page 377).
6. [optional] Generate or print the report by clicking the appropriate toolbar tool.

---

**Note:** Report templates can also be applied at generation time (see *Generating a Model Report* on page 415).

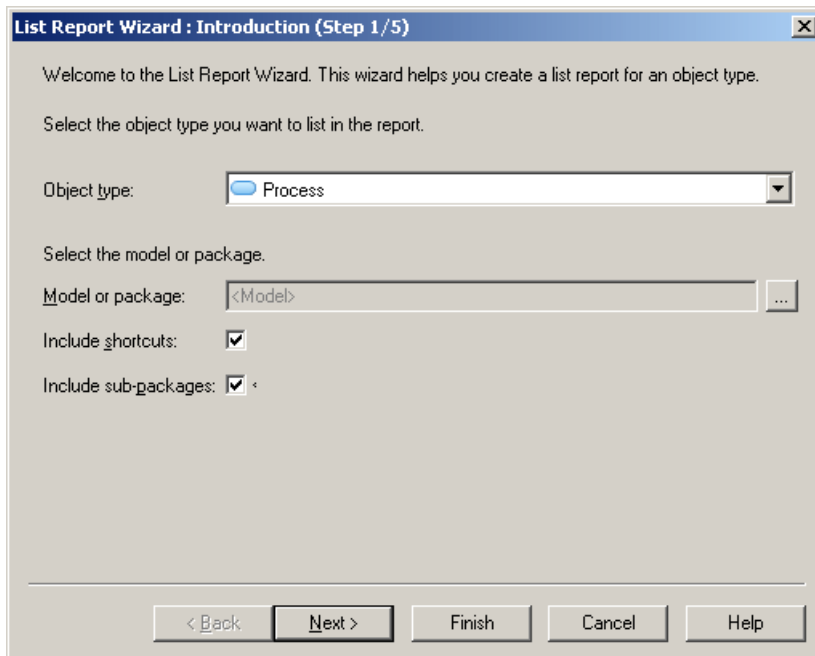
---

## Creating a List Report

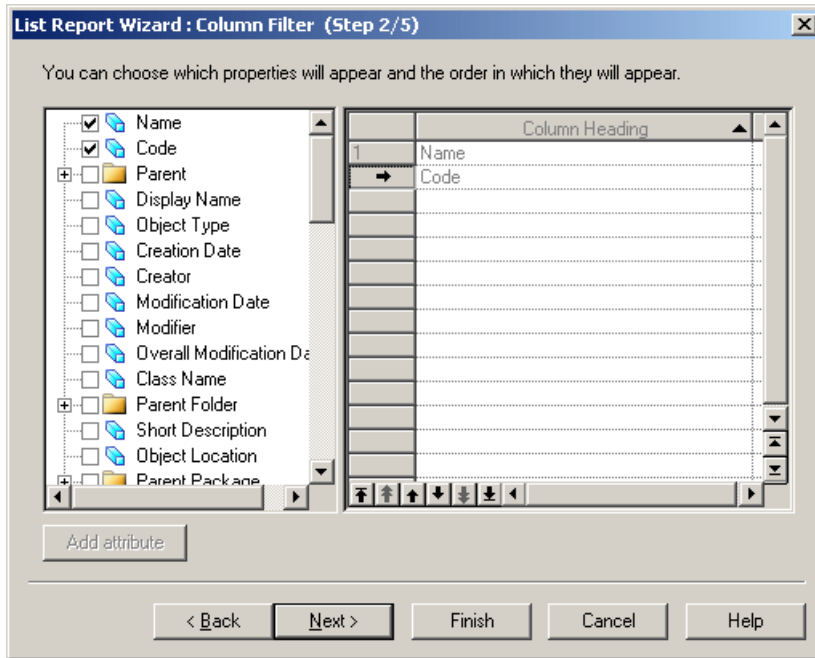
A *list report* documents a single object type within a model, and is displayed as a customizable list with columns and rows that you can filter as necessary. A list report is saved in the model and can be exchanged between models of the same type.

You can create snapshots (called *result sets*) of a list report to keep a history of the execution of a list report in your model. Result sets are listed in the browser beneath their parent list report, and are saved with the model (see *Creating Result Sets* on page 374).

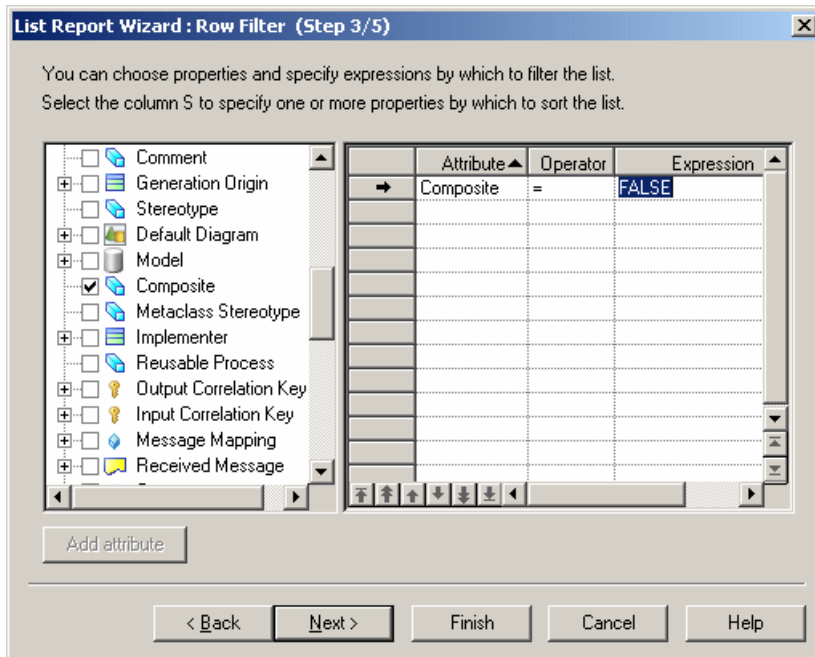
1. Launch the List Report Wizard by selecting **Report > List Report Wizard**, and select the object for which you want to create the report. By default the list report is based on the model and excludes shortcuts and sub-packages:



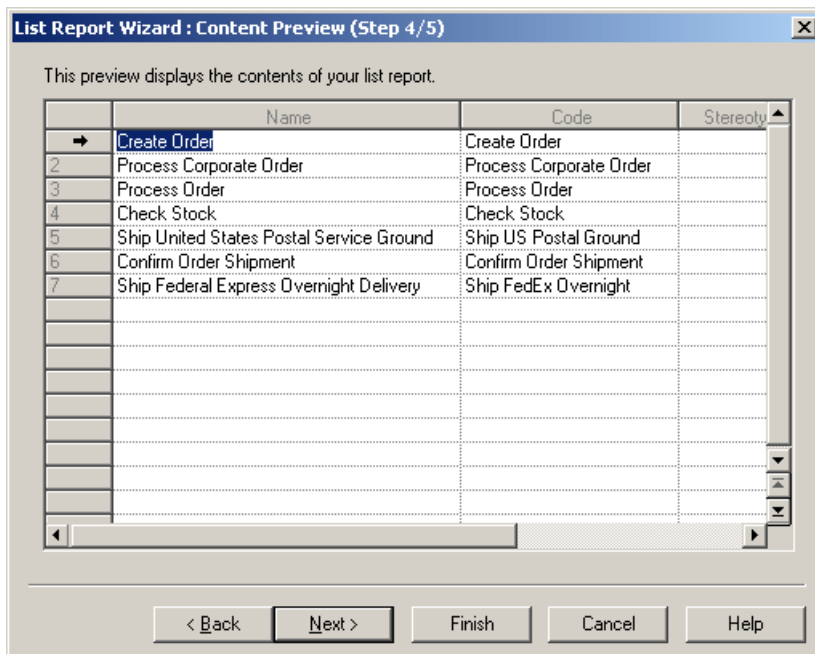
2. Click **Next** to go to the Column Filter page, which allows you to specify which of the object's properties will be included in the list report. Select a property in the left-hand pane to add it to the list in the right-hand pane. You can promote or demote properties in the list using the arrows at the bottom of the pane:



3. Click **Next** to go to the Row Filter page allows you to specify filters to restrict the objects that will be included in the list report. Select a property in the left-hand pane to add it to the list in the right-hand pane, select an operator, and then enter an expression to filter by (see *Defining a Filter Expression* on page 116). You can specify to sort the list on the values of a property by selecting the S[ort] checkbox.



- Click **Next** to go to the Content Preview page allows you to visualize the results of your choices so far:



To alter the definition click the **Back** button.

5. Click **Next** to go to the End page, which allows you to specify a name and code for the list report, and to add a comment. You can also specify whether to generate the report to an external file.

6. Click **Finish** to exit the wizard and create the report.

The list report is added to the model and listed in the Browser under the List reports folder. If you have selected to generate the report to an external file, you will be asked to specify a file name.

## List Report Properties

You can modify an object's properties from its property sheet. To open a list report property sheet, double-click its Browser entry in the List Reports folder or in the List of List Reports. By default, the property sheet of a list report always opens on the Content tab.

The General tab contains the following properties:

Property	Description
Name	Specifies the name of the list report.
Code	Specifies the code of the list report.
Comment	Descriptive comment for the object.

Property	Description
Object type	Specifies the type of the object the list report will be based on. You must select an object type to have any content in your list report.
Model or Package	Specifies the model or package from which the objects will be drawn. Package selection is unavailable for global objects such as users.
Include shortcuts	Specifies whether the list report includes shortcuts.
Include sub-packages	Specifies whether the list report includes sub-packages. This option is unavailable for global objects such as users.

The following tabs are also available:

- **Column Filter** - Lets you choose the object properties to be used as column titles in the list report and the order in which they will be displayed.
- **Row Filter** - Lists the filters that restrict the rows included in the list report. Select a property in the left-hand pane to add it to the list in the right-hand pane, select an operator, and then enter an expression to filter by (see *Defining a Filter Expression* on page 116). You can specify to sort the list on the values of a property by selecting the S[ort] checkbox.
- **Content** - Displays the current values for the list report. Properties selected in the **Column Filter** tab are displayed as column headings and property values in rows must satisfy filter expressions defined in the **Row Filter** tab. You can open the property sheet of any object included in the list report by clicking the **Properties** tool.

Note that data displayed on this tab does not dynamically change when you perform a change to your model that may affect your list report. To update the data, you must click the **Refresh List Report** tool.

Use the generation tools to generate a list report result set as an RTF, HTML, XML, or XLS/CSV file (see *Generating a List Report* on page 375).

- **Result Sets** - lists the result sets stored for the list report (see *Creating Result Sets* on page 374). Click the **Properties** tool to open a result set for generation.

## Creating Result Sets

A result list is a snapshot of the content of a list report at a given system date and time. You can create as many result sets as you want for the same list report, in order to keep a history of a given list report for future reference.

You can create a result set in any of the following ways:

- Open the property sheet of a list report, click the **Result Sets** tab, and then click the **Create Result Set** tool.
- Right-click a list report in the Browser and select **New > List Report Result Set** from the contextual menu.

Result sets are stored within the model and display under the list report to which they are related in the Browser:



### Result Set Properties

You can modify an object's properties from its property sheet. To open a result set property sheet, double-click its Browser entry in the List Reports folder just beneath the list report to which it applies. The following sections detail the property sheet tabs that contain the properties most commonly entered for result sets.

The General tab contains the following properties:

Property	Description
List Report	Name of the list report to which the result set applies.
Report Date	Date and time when the result set was created.
Comment	Descriptive comment for the result set that allows you to identify it.

The Content tab shows the contents of the result set. Use the generation tools to generate the result set as an RTF, HTML, XML, or XLS/CSV file.

## Generating a List Report

You can generate a list report to a CSV, XLS, RTF, HTML, or XML file.


- Right-click the list report in the Browser and select **Generate > Format**.
- Open the property sheet of the list report, select the Content tab, and click the Generation *Format* tool.
- Select **Report > Generate List Report** to open the Generate List Report dialog box.



You can also right-click a result set in the Browser and select **Preview** or **Print**.

## Importing and Exporting List Report Files

It can be useful to exchange list report files between models of the same type. For example, you may want to compare the properties of a certain subset of classes in two OOMs. You can import and export list reports to and from your model using the List of List Reports (**Report > List Reports**).

The following tools are available on the List of List Reports:

Tool	Description
	List Report Wizard - Launches the List Report Wizard (see <i>Creating a List Report</i> on page 370).

Tool	Description
	Import List Report from File - Opens a standard Open dialog, which allows you to browse to the list report file to import. A list report file has a .LRT extension.
	Export List Report to File - Opens a standard Save As dialog, which allows you to browse to the location to save the list report.

## Creating a MultiModel Report

A *multimodel report (MMR)* is a PowerDesigner report that can document any number of models together and show the links between them. To create such a report, you must have at least one model open in the workspace, and you can add additional models at any time.

1. Select **File > New Model** and choose Multi-Model Report.

This item may be in the left or right hand pane, depending on the configuration of your New Model dialog (see *Creating a Model* on page 9). It is not available if you do not have at least one model open in your workspace.

2. Enter a **Report name**, specify the **Language** to use for report titles and other framing text, and select a model from the **Model name** list as the basis for the first section of the report.
3. [optional] Select a template (see *Creating a Report from a Template or an Empty Report* on page 369) for this first section from the Report Template list.

**Note:** If you choose a template in a language different from the one specified for the report, standard report titles and framing text will be presented in the report language and any user-defined text in the template will be in the template language.

4. [optional] To use the new report format and editor (see *The Report Editor* on page 377), deselect **Use legacy Report Editor**.
5. Click **OK** to create the multimodel report and open it in the Report Editor.
6. [optional] To add a second model open in the workspace, select **Report > Add Section**, select the model to add (and, optionally, a template), and click **OK**.

Each model in the report belongs to a separate *section*. You can only add models that are currently open in the workspace, but once a model has been added, you can edit the report even if the source model has been closed.

**Note:** To add a section to a legacy report, use the report property sheet **Sections** tab (see *Report Properties* on page 418).

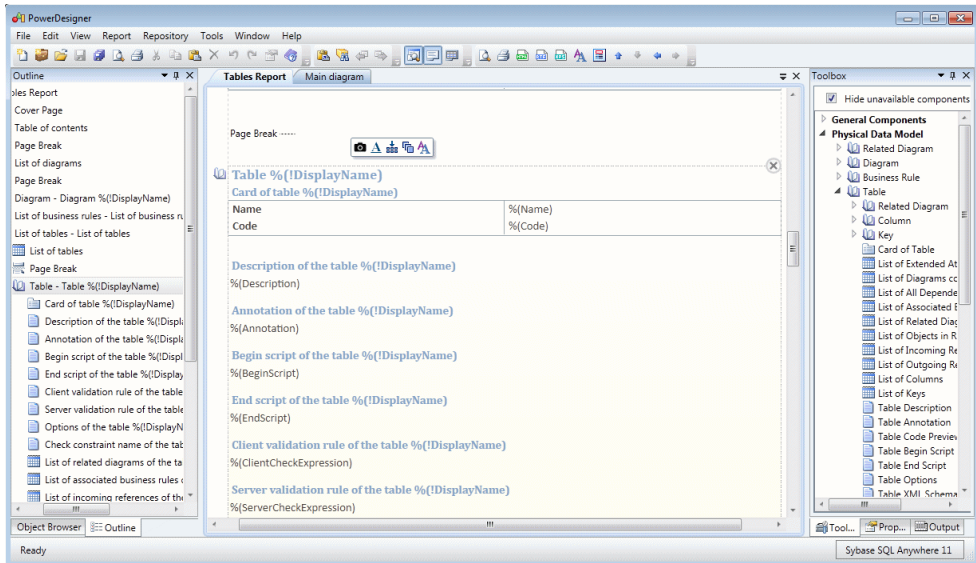
7. [optional] Launch the Report Wizard to populate and format the section (see *Creating a Report with the Report Wizard* on page 364).
8. [optional] Edit the report in the Report Editor (see *The Report Editor* on page 377).
9. [optional] Generate the report (see *Generating a Model Report* on page 415).



## The Report Editor


You can edit model reports, multi-model reports, and report templates in the Report Editor. To open a report in the editor, double-click its entry in the Browser or select **Report > Reports**, select your report in the list, and click the **Edit Report** tool.





Reports are composed of report items, which provide various ways of documenting model objects (books, cards, lists) and other report ornamentation such as a table of contents, page breaks, and free text (see *Adding Items to a Report* on page 379).



The Report Editor provides four views:






- **Outline** (left) - Provides an overview of the tree structure of your report, and supports reordering by drag and drop and various other operations by right-clicking items.
- **Design** (center) - Provides a detailed graphical view of the report, and supports wysiwyg editing of item layout and formatting. The following tools are available on the command bar, which appears when you select a report item in the Design view or by right-clicking an item in the Design or Outline views):


Tool	Description
	<b>Quick View</b> - Previews the item (see <i>Previewing a Report or Report Item</i> on page 397).
No Tool	<b>Up / Down</b> - Moves the item up or down one place in the report.
No Tool	<b>Promote / Demote</b> - Moves the item up or down one level in the report.

Tool	Description
	<b>Properties</b> - Selects properties to display in cards or lists, and reorder them (see <i>List and Card Report Items</i> on page 382).
	<b>Collection</b> - [books, cards, lists] Changes the type of object that will be published to the item.
	<b>Selection</b> - [books, cards, lists] Specifies the individual objects that will be published to the item (see <i>Selecting Objects to Display for a Report Item</i> on page 393).
	<b>Format/Styles</b> - Modifies the specific format for the item or the default styles for all items of this type (see <i>Specifying Global Styles and Local Formats for Report Items</i> on page 391).
No Tool	<b>Show Title</b> - Toggles the display of the item's title in the body of the report.
No Tool	<b>Hierarchical Display</b> - [composite object books] Toggles the organization of composite object book items, such as those representing packages, OOM activities, or BPM processes between List (where they are all displayed on one level as siblings) and Hierarchical (where child objects are displayed inside their parent).
No Tool	<b>Show Title in HTML TOC/Show Contents in HTML TOC</b> - Toggles the display of the book item title and the the book's sub-item titles in HTML report table of contents.
No Tool	<b>Delete</b> - Hover over an item and then click the X in its upper right corner to delete the item.

- **Toolbox** (right) - Lists the report items you can add to your report by double-clicking or dragging and dropping them onto the Design or Outline views (see *Adding Items to a Report* on page 379). By default, only items associated with objects present in your model are displayed. To show all items, deselect the **Hide unavailable components** check box at the top of the Toolbox.
- **Properties** (right, hidden) - Lists the properties of the report item selected in the Design or Outline views.

The following tools are available from the Report toolbar:

Tool	Description
	<b>Print Preview/Print</b> - (see <i>Previewing a Report or Report Item</i> on page 397).
	<b>Generate HTML/RTF/XPS</b> - Generates the report in the specified format.
	<b>Styles</b> - Opens the Default Styles dialog (see <i>Specifying Global Styles and Local Formats for Report Items</i> on page 391).
	<b>Show/Hide Header/Footer</b> - Toggles the display of the report header and footer (see <i>Modifying Report Section Headers and Footers</i> on page 395).
	<b>Up / Down</b> - Moves the selected item up or down one place in the report.

Tool	Description
	<b>Promote / Demote</b> - Moves the item up or down one level in the report.








## Adding Items to a Report


You can add report items by double-clicking or dragging and dropping tools in the report Toolbox. Generic report items are available under the General Components section of the report Toolbox, while items instantiated for the objects present in your model are available under the Model section. Standard and extended objects and properties are all available for selection. You can insert the same item multiple times in a report.

To add an item to a report:

- Below the selected item - double-click the appropriate tool in the Toolbox.
- Anywhere in a report - drag the tool from the Toolbox and drop it in the appropriate position in the Design or Outline views. When the cursor is over an existing report item in the Design view, arrows appear to guide the placement of the new item. To place the item next to, above, or below the existing item, drop it on the left, right, top, or bottom arrow. To add the item as a child of the existing item, drop it on the center guide arrows.









The following tools are available to insert report items to document model objects:

Icon	Description
	Book – Groups together cards, lists, and text items to display all or most of the properties of an object and may contain sub-books to describe any sub-objects (see <i>Book Report Items</i> on page 381).  <b>Note:</b> To display packages or other composite objects (such as BPM processes that can contain other processes) hierarchically with children shown beneath their parent instead of all at a single level, add the appropriate book item, right-click it, and select <b>Hierarchical Display</b> . HTML reports always use hierarchical display.
	Card – Displays a configurable subset of properties of an object in a two-column table with the property name in the left column and the value in the right column (see <i>List and Card Report Items</i> on page 382).
	List - Displays a list of objects in a multi-column table with one property in each column. (see <i>List and Card Report Items</i> on page 382).
	Text – Displays an object property or free text (see <i>Text Property and Free Text Report Items</i> on page 383).
	Diagram - Inserts a PowerDesigner diagram (see <i>Diagram Report Items</i> on page 384).
	Chart - Inserts a chart to visualize statistics about a collection of objects (see <i>Chart Report Items</i> on page 384).
	Matrix - Inserts a dependency matrix (see <i>Dependency Matrices</i> on page 180).

Icon	Description
	Section - Inserts a section. Sections are only supported in multimodel reports, where each section contains a report relating to a specific model (see <i>Creating a MultiModel Report</i> on page 376).

**Note:** By default, a report item will generate information for every object of the appropriate type in the model. For example, the Table book will generate information for every table in your model. To generate for only a subset of objects defined by name or criteria, use the **Selection** tool in the item's command bar (see *Selecting Objects to Display for a Report Item* on page 393).

The following tools are available to add miscellaneous additional report items:

Icon	Description
	Cover Page - Inserts a set of text items followed by a page break to create a cover page:  <div style="border-left: 2px solid #0070C0; padding-left: 10px; margin-left: 10px;"> <p>[Enter your company name]</p> <p style="font-size: 24pt; font-weight: bold; color: #0070C0;">[Enter a report name]</p> <p>[Enter a report subtitle]</p> </div> <p>Page Break -----</p>
	Image File - Displays an image, selected via a file chooser.
	Column Panel - Inserts a container element that holds two report items side-by-side. A column panel is automatically created when you drag an item onto the Design view and drop it on the left or right guiding arrow of an existing item.
	Page break – Inserts a page break. Right-click the inserted item and deselect Generate in HTML to disable it when generating HTML reports.
	Table of contents – Inserts a table of contents followed by a page break.
	Text – Inserts a text item. This can be a free text paragraph or, if you specify a data source, the value of a property.
	Text file – Inserts the contents of a text file, selected via a file chooser.
	Title - Inserts a titled container. Add items to the container, which inherits the scope of its parent item, as necessary.

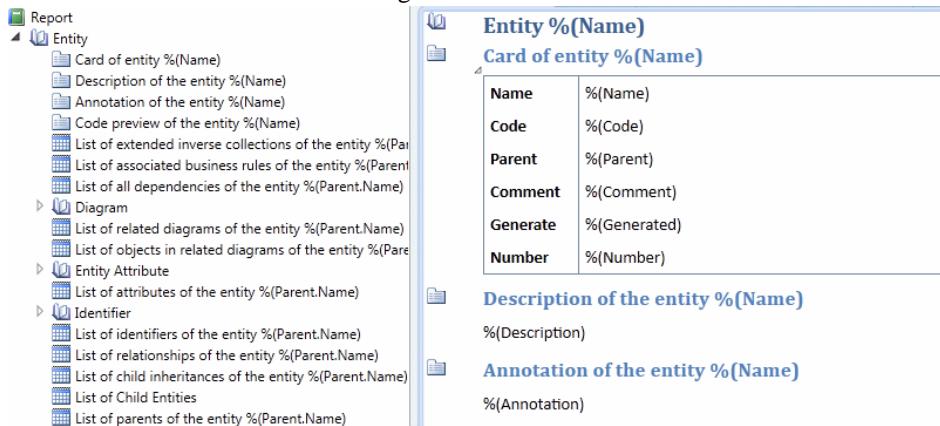
**Note:** You can move items from one report to another report of the same type of model by drag and drop. Press the **Ctrl** key while dragging and dropping to copy the item to the second report.

## Book Report Items

Book report items can contain cards, lists, text items, and sub-object books to give detailed information about your model objects.

1. To insert a book item, click in the Design or Outline view in the position where you want to add the item and then double-click or drag and drop the appropriate Toolbox item.

A book is displayed in the Outline view as a node with a number of subitems, and the same series of items are shown in the Design view:



2. To remove unwanted sub-items from the book, select them in the Outline view and press **Delete** or hover over them in the Design view and click the X in the upper-right corner of the item.
3. To reorder sub-items inside the book, drag and drop them in the Outline or Design view.
4. For composite objects (such as packages that can contain other packages or BPM processes or OOM classes that can contain other processes or classes) you can choose between two presentations:
  - List Display - [default] Objects, their children, grandchildren, and subsequent descendants are all generated at the same level.
  - Hierarchical Display - Children are generated as sub-items inside the parent object book, grandchildren are generated as sub-items inside the child book, and so on to any level of decomposition. Select the **Hierarchical Display** option in the Properties view.
5. To modify the selection of objects that will be generated in the report from this book and how they will be sorted, click the command bar **Selection** tool and specify filter and sorting criteria or a manual selection of objects (see *Selecting Objects to Display for a Report Item* on page 393).

- To modify the default styles for a sub-item, click its icon to display the command bar, and then click the **Styles** tool (see *Specifying Global Styles and Local Formats for Report Items* on page 391). To override the default styles for this instance, click the **Format** tool.

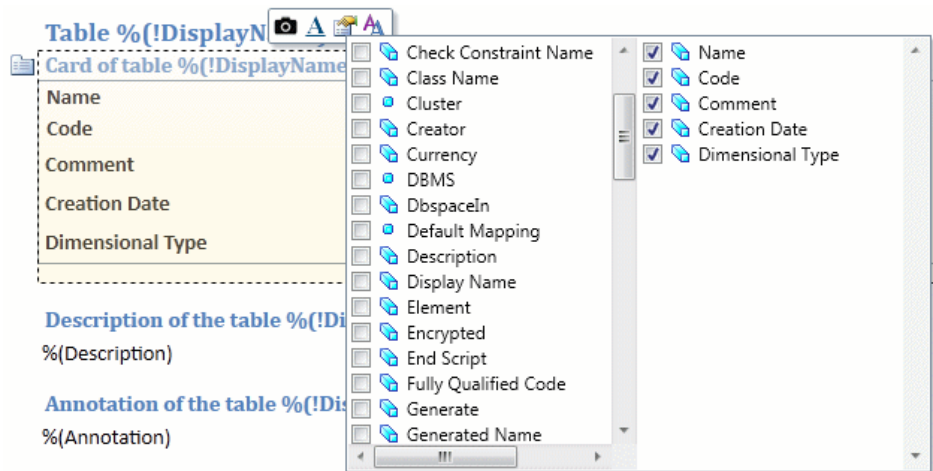
## List and Card Report Items

List and card report items are generated as tables. A list displays all objects, with one column per property and one row per object. A card displays a single object, with one row per property. You can specify which attributes will be displayed, in which order, and the width of the columns.

- To insert a list or card item, click in the Design or Outline view in the position where you want to add the item and then double click or drag and drop the appropriate Toolbox item.

**Note:** Cards and lists are commonly added to the report as part of a book (see *Book Report Items* on page 381).

- To modify the properties displayed, click the card or list icon in the Design view to display the command bar, and then click the **Properties** tool to display a list of available properties, with properties selected for display on the right, and unselected properties listed in alphabetical order on the left:



3. Select or deselect properties as appropriate and then click outside the list to close it. Properties selected will be added as columns in a list or rows in a card.

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**Note:** All properties, including extended attributes are available for selection in this list.

4. To reorder list columns or card rows click in a list column header or card row header to select it, and then click again and drag and drop it to the desired position.
5. To modify the width of list columns or the column separating the card row header from the property values, hover over a dividing line until the double-arrow cursor appears, and then click and drag to increase or decrease the width.
6. To modify the default styles for a list or card item, click its icon to display the command bar, and then click the **Styles** tool (see *Specifying Global Styles and Local Formats for Report Items* on page 391). To override the default styles for this instance, click the **Format** tool.

## Text Property and Free Text Report Items

Multi-line text properties, such as the Comment or Code Preview, are provided by default as text items. You can also add free text items wherever necessary.

1. To insert a text property report item, click in the Design or Outline view in the position where you want to add the item and then double click or drag and drop the appropriate Toolbox item.

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**Note:** Text properties are commonly added to the report as part of a book (see *Book Report Items* on page 381).

2. To edit a free text item, double-click the item in the Design view and enter text as appropriate.
3. To modify the property referenced by a text property item, enter the name of the property in the format `%(Property)`.

4. To modify the default styles for a text item, click its icon to display the command bar, and then click the **Styles** tool (see *Specifying Global Styles and Local Formats for Report Items* on page 391). To override the default styles for this instance, click the **Format** tool.

### Diagram Report Items

Diagram report items are generated as images. If a report is generated as HTML, diagram symbols are clickable targets, with links to the corresponding object card.

1. To insert a diagram item, click in the Design or Outline view in the position where you want to add the item and then double click or drag and drop the appropriate Toolbox item.



**Note:** You can display objects organized by the diagram in which they appear by dropping the appropriate book, card, or list items and dropping them onto a diagram item.

2. To modify the default styles for a diagram, click its icon to display the command bar, and then click the **Styles** tool (see *Specifying Global Styles and Local Formats for Report Items* on page 391). To override the default styles for this instance, click the **Format** tool.

The zoom option offers the following settings:

- Fit to page - Shrinks the diagram to fit on a single report page.
- Custom zoom - Zooms by the given percentage.
- Keep diagram layout - Each diagram page appears full size on its own report page.

### Chart Report Items

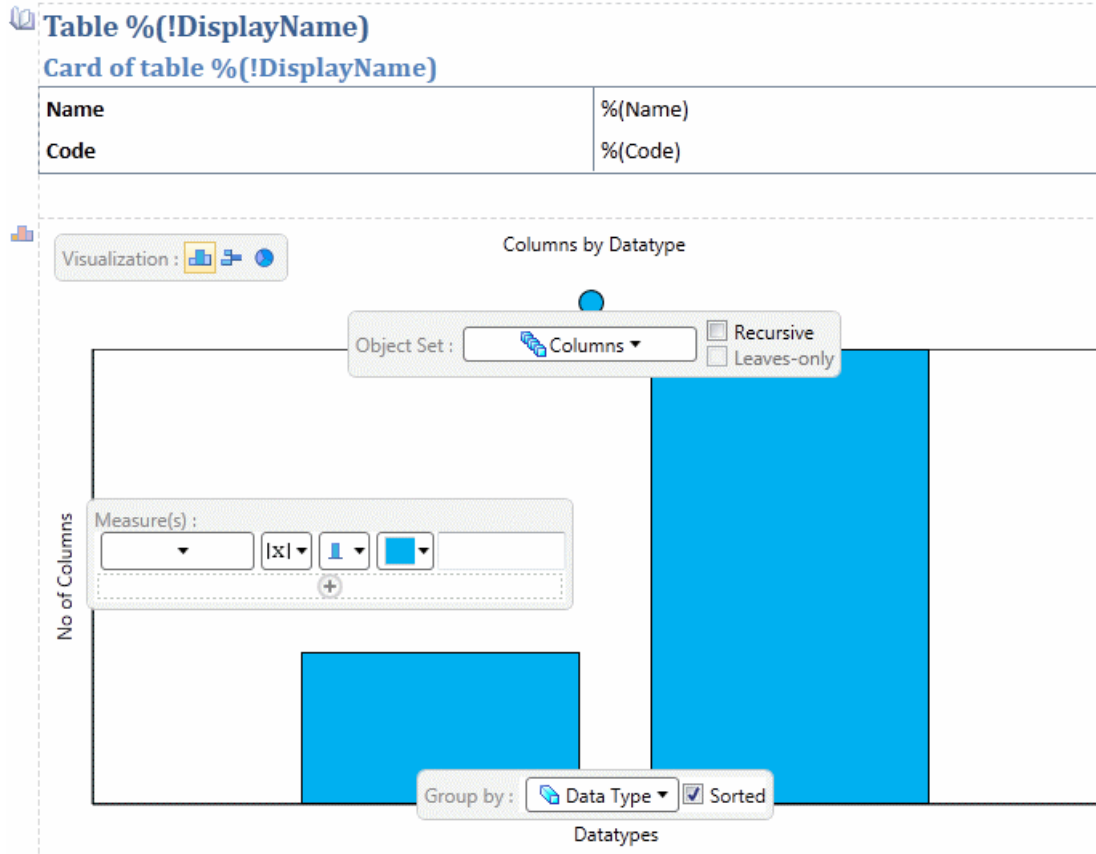
Chart report items provide a way to visualize statistics about a collection of objects as a column, bar, or pie chart.

1. To insert a chart item, click in the Design or Outline view in the position where you want to add the item and then double-click or drag and drop the **Chart** tool.

The position in which you drop the chart determines the statistics that you can visualize. In this example, the chart is a child of the Table book, which provides access to the Columns sub-object collection. To analyze tables or any other collection of standard objects, you should drop the chart at the top level of your report. You can base a chart on any of the standard collections in the PowerDesigner metamodel, or create your own extended or calculated collection to analyze (see *Customizing and Extending PowerDesigner* >



*Extension Files).*



2. Select the type of visualization to use. You can choose between:
  - Column chart - vertical columns and/or line graphs.
  - Bar chart - horizontal bars or and/or line graphs.
  - Pie chart - a circle divided into sectors.
3. Specify the parameters of the chart:
  - **Object set** - Specifies the collection of objects that the chart will analyze.
    - **Recursive** - Specifies that the chart should include all sub-objects in the case of composite objects such as EAM architecture areas or BPM processes, and objects in packages. In the case of composite objects, selecting the **Leaves-only** sub-option restricts the data set to only those final objects in the tree that are not further decomposed.

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**Note:**

- **Group by** - Specifies the property that will be used to categorize objects for display. If you select nothing or the Name property, then one bar or segment will be displayed for

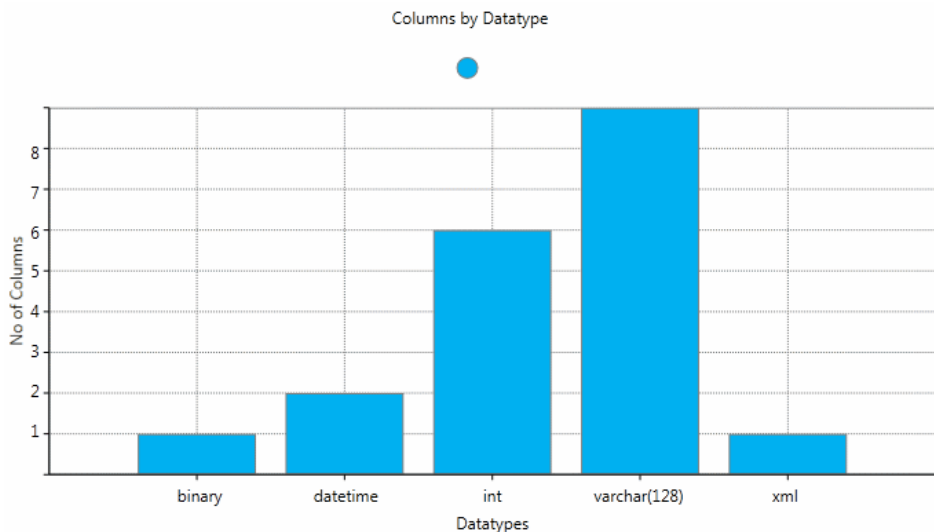
each object. If you select a property of type date, you can choose to group by day, week, month, quarter, or year.

- **Measure(s)** - Specifies how the size of bars or segments will be calculated. While a pie chart can only support one measure, column and bar charts can support multiple measures. For each measure, you can also specify:
    - The measure type - Count is always available, and sum and average are available for numeric properties.
    - The base color from which the color scheme is determined and the label to give to the measure. For column or bar charts, you can also specify whether the measure is represented as bars/columns or as a graph line.
4. Replace the placeholder text to the left of, below, and above the chart to give labels to the x and y axes and to provide a title for the chart. You can specify to print the column or bar names diagonally using **Primary** and **Secondary Axis Labels Rotation Angle** properties in the **Properties** view.

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**Note:** The graphic displayed in the Design view is for illustration purposes only. To preview your chart with actual data, click the chart background and then click the **Quick View** tool.

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5. To modify the default styles for a chart item, click its icon to display the command bar, and then click the **Styles** tool (see *Specifying Global Styles and Local Formats for Report Items* on page 391). To override the default styles for this instance, click the **Format** tool.

### **Example: Creating Charts for Hardware Servers**

In this example, we will create three charts to visualize information about a set of hardware servers modeled in an enterprise architecture model. We will analyze the distribution of

servers by geographic site, the operating system split, and the quarterly spend on servers (using extended attributes).

Before creating the report, the EAM model was created and populated with hardware servers assigned to various sites, and two new properties were added to the Hardware Server property sheet (see *Adding New Properties to an Object* on page 154) as extended attributes:

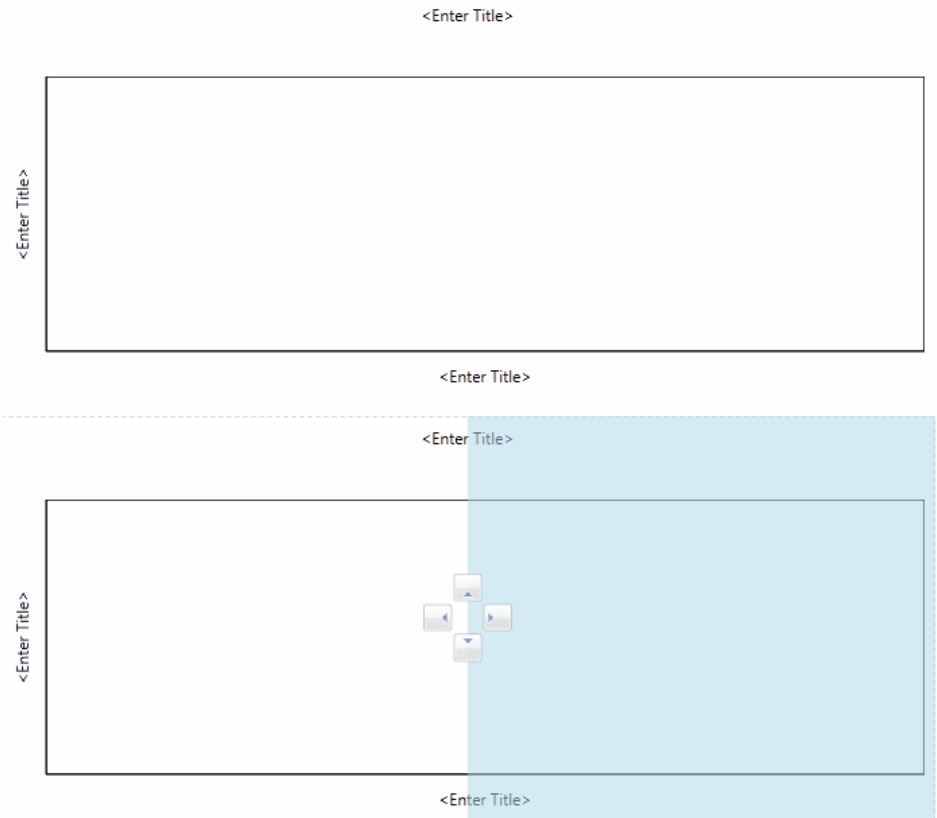
Name	Data Type
Purchase Date	Date
Purchase Cost	Integer

1. Create a report, expand the General Components category in the report Toolbox, and double-click the Title tool to add a title. Click the default title text and enter `Hardware Servers`.
2. Click the Chart tool and drag and drop it onto the center of the guide arrows on the title item to create a chart in the Hardware Servers item:



3. Drag the Chart tool again and drop it onto the bottom guide arrow on the first chart item to create a new chart underneath it. Then drag the Chart tool a third time and drop it on the right guide arrow on the second chart to create a new chart next to it:

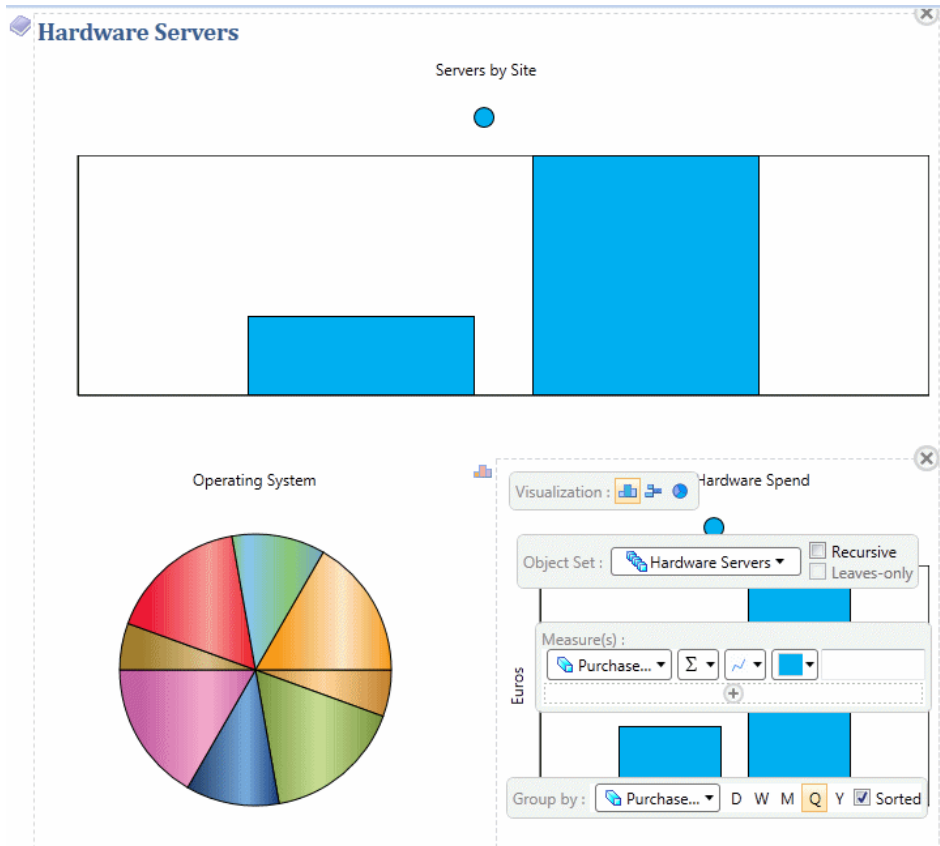
**Hardware Servers**



4. Enter the following chart parameters:

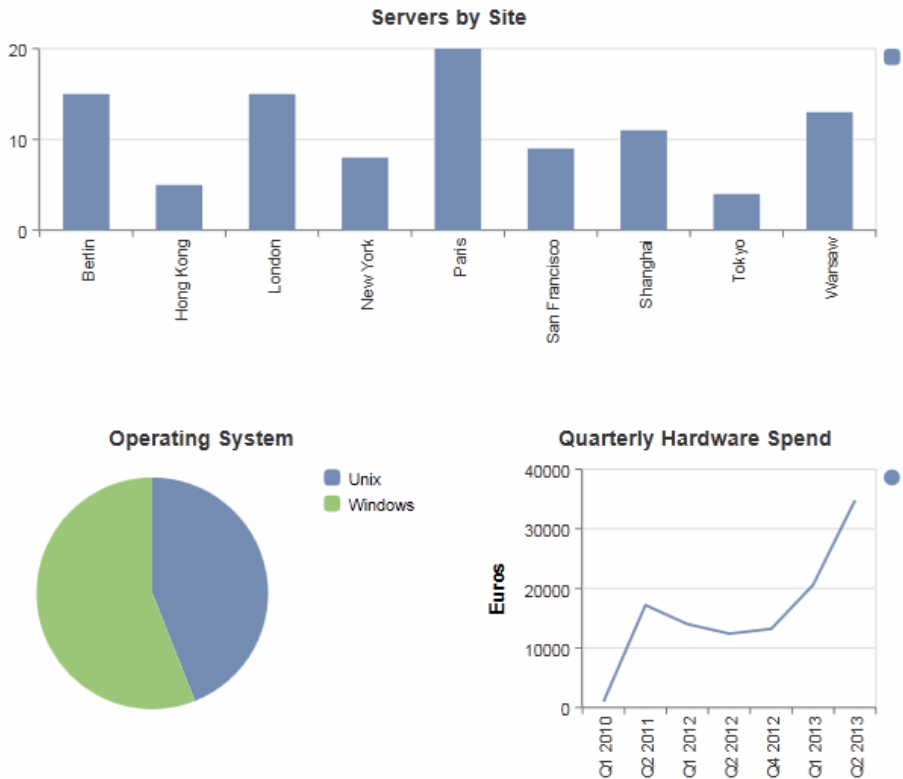
Parameter	First Chart	Second Chart	Third Chart
Visualization	Column	Pie	Column
Object Set	Hardware Servers	Hardware Servers	Hardware Servers
Group by	Site	Operating System	Purchase Date/ ([Q]uarter)
Measure	[None]/Count/Bar	[None]/Count	Purchase Cost/Sum/ Line
Top Title	Servers by Site	Operating System	Quarterly Hardware Spend
Left Title	[Space]	N/A	Euros
Bottom Title	[Space]	N/A	[Space]

**Note:** The representation of the chart in the Design view does not change as you complete the parameters. You can, at any time, click the background of a chart and then click the **Quick View** tool to preview it with the data from your model.



5. Click the **Generate Web Report (HTML)** tool in the report tool bar and select to open it in your browser:


## Hardware Servers



## Dependency Matrix Report Items

Dependency matrix report items are generated as tables with one row per object and one column per dependent object with an X or other value in matrix cells to indicate a dependency.

1. To insert a dependency matrix item, click in the Design or Outline view in the position where you want to add the item and then double click or drag and drop the appropriate Toolbox item.

 **Dependency Matrix**

	%(Name)
%(Name)	%(GetCellValue(%(CurrentRow), %(CurrentColumn), "X"))

**Note:** Dependency matrices are commonly added to reports as part of the Dependency Matrix book item, which also describes the properties of the matrix. To add only the matrix itself, expand the matrix book and then double-click or drag and drop the matrix item.

2. To modify the default styles for the matrix cells, column header, or row header, click in the appropriate field to display the command bar, and then click the **Styles** tool (see *Specifying*



*Global Styles and Local Formats for Report Items* on page 391). To override the default styles for this instance, click the **Format** tool.

3. To modify or override the default styles for row and column header dividers, the horizontal and vertical cell dividers and the overall format of the matrix, click in the top left field and then click the **Styles** or **Format** tool.

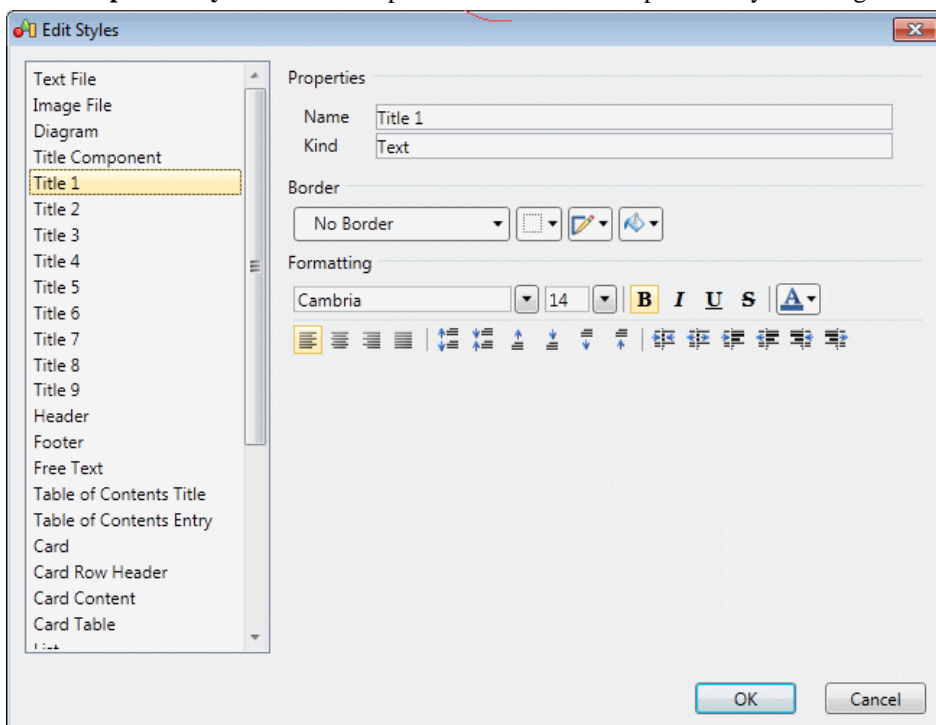
## Specifying Global Styles and Local Formats for Report Items

The formatting of your report is highly customizable. You can set global default styles and override them for individual report items by specifying local formats.

Use the following tools on the Design view command bar to access global default styles and individual formats:












Tool	Description
	<b>Format</b> - Specifies the format for the selected report item
	<b>Styles</b> - Specifies the default global style for all report items of this type.

1. Select **Report > Styles** from the Report Editor window to open the Styles dialog:




2. Select the report item element for which you want to specify a default style in the left pane. The following elements are available:

- Text / Image File
  - Title Component - Control the borders, fill, and spacing around the container headed by a title report item.
  - Title 1-9
  - Header / Footer
  - Free Text
  - Table of Contents Title / Entry
  - Card / List / Matrix - Control the borders, fill, and spacing around the item (including its title).
  - Card Row Header / List Column Header / Matrix Row / Column Header - Control the font and spacing of the header cells.
  - Card Content / List Content / Matrix Content. - Control the font and spacing of the content cells.
  - Card Table / List Table / Matrix Table - Control the borders and spacing of the table and the internal dividers between the header and the cells and between the cells.
3. Specify the default styles for the selected element using the following tools. Changes are visible immediately in the Design window:

Tool	Description
	Font
	Font Size
	Bold / Italic / Underline / Strikethrough
	Font Color
	Align Left / Center / Right / Justify
	Borders / Border Color / Fill
	Increase / Decrease Vertical Spacing - Increase or decrease the spacing above and below the element equally.
	Increase / Decrease Top / Bottom Spacing - Increase or decrease the vertical spacing above or below the element.
	Increase / Decrease Horizontal Spacing - Increase or decrease the spacing to the left and right of the element equally.
	Increase / Decrease Left / Right Spacing - Increase or decrease the horizontal spacing to the left or right of the element.
	Row / Column Header Divider - Toggle the display of a dividing line between the table row or column header and the content cells.

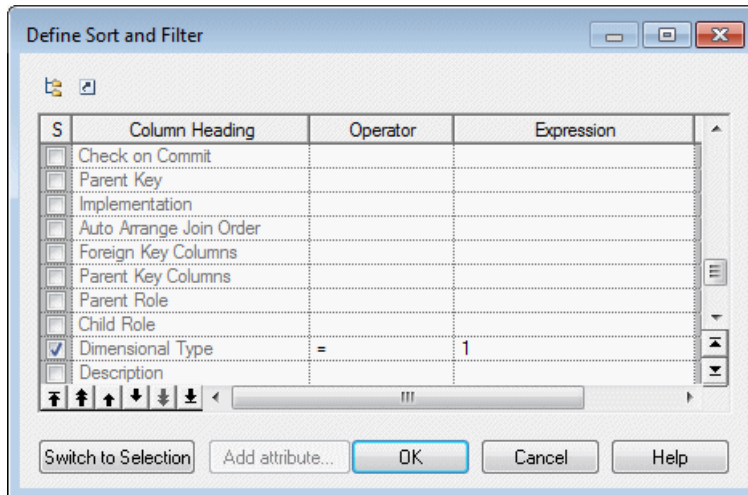


Tool	Description
	Horizontal / Vertical Cell Dividers - Toggle the display of dividing lines between the table content cells.

## Selecting Objects to Display for a Report Item

You can refine the selection of objects for individual report items and control their order by criteria or by selecting individual objects from the list of objects included in the report. For example you can have a list of all the tables in your PDM, but you need detailed information about only some of them, and so specify a selection for the Table Book.

1. Right-click a book or list item and select **Selection** (or, for matrix items, **Row Selection** or **Column Selection**) to open the Define Sort and Filter dialog.
2. To define a filter and sorting criteria:
  - Select columns to sort on - by checking the [S]ort column checkbox.
  - Reorder the columns in the list - by using the arrows at the bottom left of the dialog. To move all the selected rows to the top of the list, press **SHIFT+ENTER**.
  - Define one or more filter expressions - by selecting an operator in the **Operator** column and entering an expression to filter by in the **Expression** column. For information about the operators and expression syntax, see *Defining a Filter Expression* on page 116.

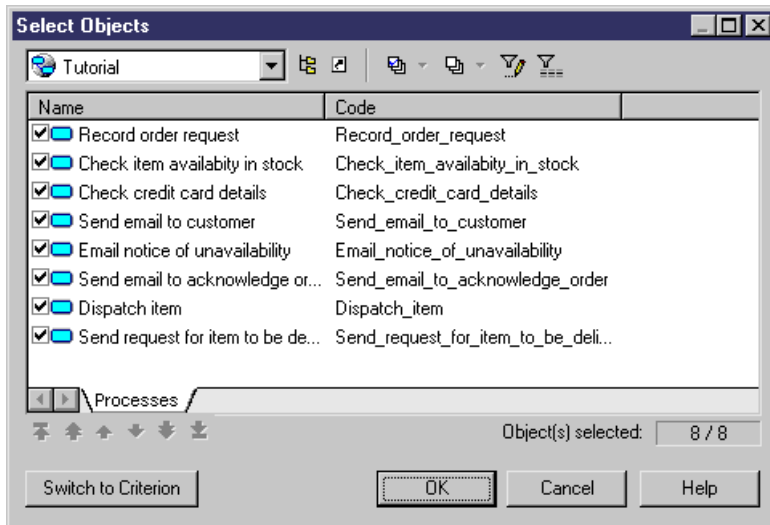


The [U]sed checkbox is automatically selected when you enter a filter expression. To disable the expression but keep it in memory, clear the checkbox.

**Note:** For lists containing multiple types of objects, to display properties other than those that are common to all the object types, click the **Add Attribute** button (see *Customizing Columns in Lists Containing Multiple Types of Objects* on page 113).

3. To select individual objects from the list of objects included in the report, click the **Switch to Selection** button:

**Warning!** You can specify either a filter or a selection, but not both. When you click this button, any information entered in the Define Sort and Filter dialog will be lost.



**Note:** If you have made a selection of objects at the report level (see *Selecting Objects to Display in the Report* on page 403), objects excluded there will not be available for selection at the report item level.

4. By default, all the objects are selected. Select the objects that you want to display using this report item. You can reorder the objects in the list by using the arrow buttons at the bottom of the dialog.

**Note:** If you define a selection of ordered objects on a package for which you have selected the **Hierarchical Display** option (see *Adding Items to a Report* on page 379), any reordering you do here is ignored.

5. When you are satisfied with your filtering or selection, click **OK** to return to the Report Editor. Note that only the last of the filter or selection from which you clicked **OK** will be applied.

## Modifying or Suppressing the Titles of Report Items

Most report items are preceded by a title item. To modify the title, select the item and then click the title text to enter edit mode. To suppress an item title from the body of the report, right-click the item and deselect the **Show Title** option.

You can reference object properties using the syntax `%(Property)`. For example, you could modify the title of the table card and use reference the Code property instead of the Name property:

Before	After
Card of Table %(Name)	Table %(Code) Card

**Note:** You can edit the default titles of all report items in the report language resource file that is attached to your report. For more information, see *Customizing and Extending PowerDesigner > Translating Reports with Report Language Resource Files*.

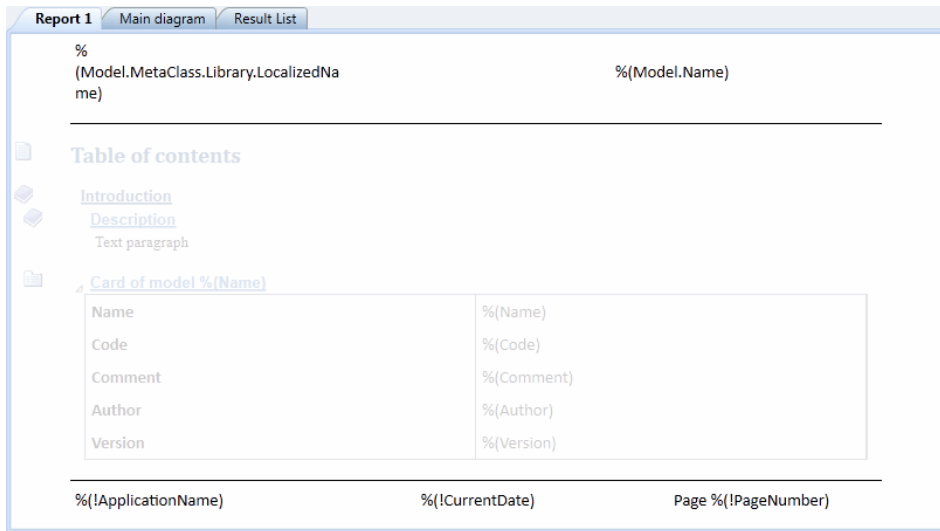
## Modifying Report Section Headers and Footers

You can review and modify the report header and footer in the Report Editor Design view. In multi-model reports, you can specify a different header and footer for each section (model).

For more information about the default header and footer, including specifying separate headers and footers for each section of your RTF report, see *Report Properties* on page 418.

1. Click the **Header & Footer** tool to display the header and footer at the top and bottom of the Design view:

Both the header and footer contain left, center, and right fields, which can contain a mixture of text and variables.



2. Click once in a field to display the command bar, from which you can launch a preview of the field or modify its format. Click again to edit the contents of the field, including modifying the variables referenced (see *Referencing Object and Model Properties* on page 396).
3. [optional] Click the Preview tool in the command bar to review your changes.
4. Click the **Header and Footer** tool to return to your report.

## Referencing Object and Model Properties

You can reference object and model properties in your reports using their public names as defined in the PowerDesigner Public Metamodel.

To reference object properties, use the following syntax:

```
% (Property)
```

For example, to reference the object code, use:

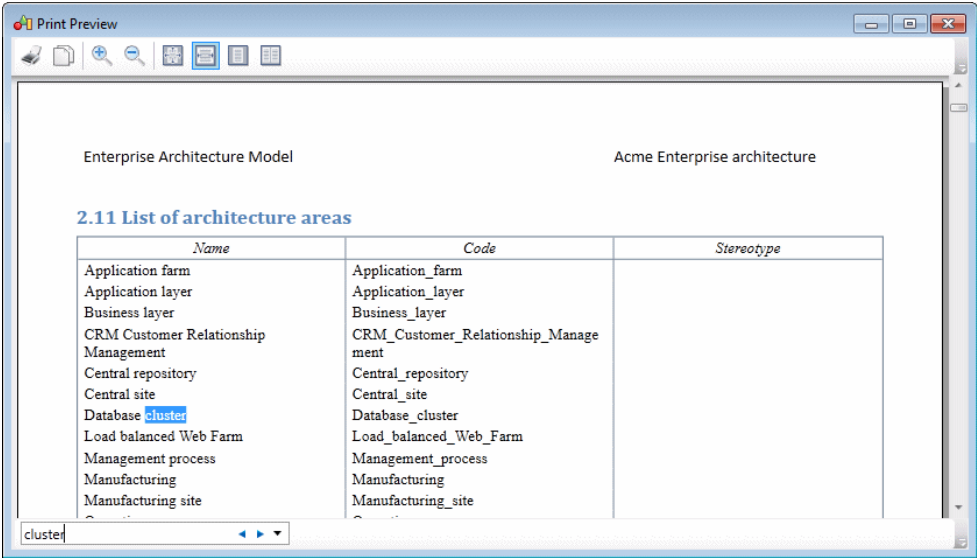
```
% (Code)
```

The following additional report variables are available:





Variable	Description
%(!CurrentDate)	Report date defined in report property sheet.
%(!CurrentTime)	Report generation time.
%(Model.Name) %(Model.Code)	Model name or code of a report section.
%(Model.Metaclass.Library.LocalizedName)	Module name of a report section.
%(!ApplicationName)	Application name (PowerDesigner).
%(!PageNumber)	[RTF] Current page number.

# **Previewing a Report or Report Item**

You can preview your report by selecting **Report > Print Preview** or by clicking the **Preview** tool in the End page of the Report Creation Wizard. You can preview a report item by selecting it in the Design or Outline view and clicking the **Quick View** tool.



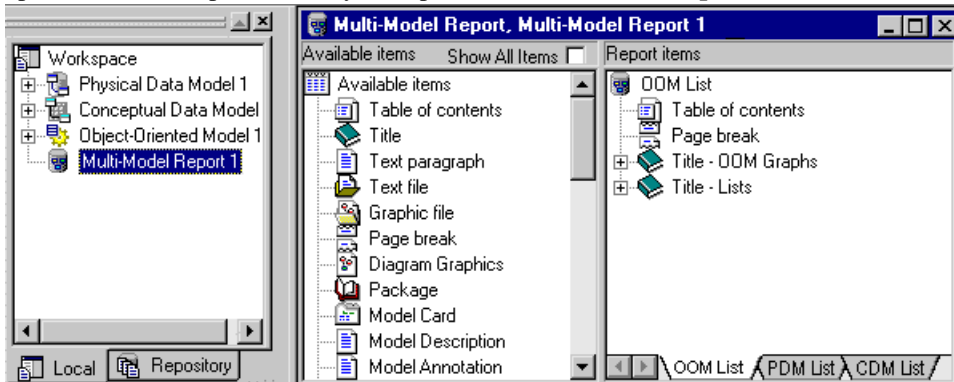
The following tools are available in this window:

Tool	Goes to preview
	<b>Print</b> - Prints the report.
	<b>Copy</b> - Copies the selected text.
	<b>Zoom In/Zoom Out.</b>
	<b>Zoom to:</b> <ul style="list-style-type: none"> <li>• <b>100%</b></li> <li>• <b>Page Width</b></li> <li>• <b>One Page</b></li> <li>• <b>Two Pages</b></li> </ul>

To search for text in your preview, enter the string in the search box at the bottom of the window and click the right or left arrow to search forward or backward.

## The Legacy Report Editor







You can edit model reports, multi-model reports, and report templates in the Report Editor. To open a report in the Report Editor, double-click it in the Browser or select **Report > Reports** to open the List of Reports, select your report and click the **Edit Report** tool.







The left pane, **Available Items**, lists the items you can include in the report, while the right pane, **Report Items**, displays the structure of your report.

The **Available Items** pane lists only the report items that correspond to objects that exist in the current model. For example, if you have not created any interfaces in your OOM, then the List of Interfaces and Interface book will not be listed. Select **Show All Items** at the top of the pane to display all the report items available for this kind of model. By default, in the Multi-Model Report Editor, all available report items are displayed if the associated model is not open in the workspace.

The following tools are available from the Report toolbar:

Tool	Description
	Report Wizard - Opens the Report Wizard (see <i>Creating a Report with the Report Wizard</i> on page 364).
	Print Preview - Displays a report print preview (see <i>Previewing Your Report (Legacy Reports)</i> on page 413)
	Print - Prints the report.
	Generate RTF - Generates the report as an RTF file.
	Generate HTML - Generates the report as an HTML file.
	Add Item - Adds an item to the Report Items pane.

Tool	Description
	Up One Level - Moves item up one level.
	Down One Level - Moves item down one level.
	Raise Level - Moves item at the same level as the book item (item that contains other items) that precedes.
	Lower Level - Moves item within the book item that follows.






## **Adding Items to a Report (Legacy Reports)**






The Available Items pane of the Report Editor lists the items that you can add to your report.

You can add an item to the Report Items pane in any of the following ways:

- Double-click the item in the Available Items pane to place it below the currently selected item in the Report Items pane.
- Drag the item from the Available Items pane and drop it at the desired position in the Report Items pane. Use the **Ctrl** or **Shift** key to select multiple items. If the pointer becomes a barred circle, that means the drop target is unauthorized. Note that you can drag and drop an item only when the Report Items pane already contains at least one item.
- Right-click the item in the Available Items pane and select Add from the contextual menu

The following kinds of report items are available:

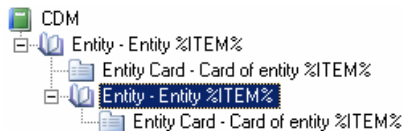
Icon	Description
	Table of contents – Inserts a table of contents. PowerDesigner automatically inserts a following page break.
	Title - Free text to introduce what is next.
	Paragraph – the following types are available, depending on the context: <ul style="list-style-type: none"> <li>• Text paragraph – free text that can be inserted anywhere</li> <li>• Description – contents of the Description sub-tab of the Notes tab of the model or object property sheet</li> <li>• Annotation – contents of the Annotation sub-tab of the Notes tab of the model or object property sheet</li> <li>• Other – text paragraphs are available as necessary to display code preview, scripts, validation rules, etc</li> </ul>
	Text file – Inserts the contents of a text file, selected via a file chooser.
	Graphical file - Inserts the contents of a graphics file, selected via a file chooser.

Icon	Description
	Page break – Inserts a page break. Right-click the inserted item and deselect Generate in HTML to disable it when generating HTML reports.
	Card – Inserts a table listing the properties of the model or package. Right-click the item after insertion and select Layout to control the properties listed (see <i>Controlling the Layout of Card Report Items (Legacy Reports)</i> on page 410)
	List - Inserts a table listing the objects of a given type belonging to the model or another object. Right-click the item after insertion and select Layout to control the properties listed (see <i>Controlling the Layout of List Report Items (Legacy Reports)</i> on page 409)
	Graphics – Inserts an image of a diagram.
	Book – Inserts a set of sub-items to report on a particular type of object. May contain cards, lists, text items, graphics, and other books as necessary.  When you add a book item to a report, you automatically add its dependent items. You can delete any dependent item that you do not need.

When you add an item to the Report Items pane, the item remains in the Available Items pane. You can insert the same item several times in the same report contents.

Notes:

- Composite objects - BPM processes can contain other processes, OOM activities can contain other activities, and CDM entities can contain other entities. Such composite object hierarchies are not included by default in the report, but you can display them by adding a second instance of the appropriate report item inside the first. In the following example, the second Entity book is added inside the first Entity book to display child entities inside their parent entities:



- Package and composite object hierarchy - When you add a package or composite object book item to a report, you can select the Hierarchical Display command in the item contextual menu to display the package or composite object hierarchy in the generated report. You do not need to use this command when you generate for an HTML report, as HTML reports always provide a hierarchical display.
- Drag and drop between reports - You can drag and drop items between reports of the same type. If you simply drag and drop an item from one report to another without pressing any key, you move the item from one report to another. You can copy an item by pressing the **Ctrl** key while dragging and dropping it. The report in which you want to drop the item must already contain at least one item.

**Note:** When you generate an HTML report that contains a diagram graphic and the object cards of the symbols, hyperlinks are created between the diagram symbols and the



corresponding object cards. You can click a symbol in the diagram to access the object card that corresponds to it in the HTML page.

---

## Modifying Items in the Report Items Pane (Legacy Reports)

You can move items in the Report Items pane by dragging and dropping them.

To copy an item, hold down the **Ctrl** key while dragging it. You can copy any item within the Report Items pane except for the root folder. Any formatting applied to the copied item is preserved. When you copy a book item, you also copy its dependent items.

### Contextual Menu

The following actions are available by right-clicking items that you have added to the report in the Report Items pane:

Command	Description
Show Title	Controls the display of the item title in generated reports.
Show Book Title in HTML TOC	[book items] Controls the display of the book item title in the table of contents of HTML reports.
Show Contents in HTML TOC	[book items] Controls the display of the sub-item titles in the table of contents of HTML reports.
Up	Moves the item up one line in the tree.
Down	Moves the item down one line in the tree.
Raise Level	Moves the item up one level in the tree.
Lower Level	Moves the item up one level in the tree.
Format	Opens the dialog allowing you to modify the formatting of the item (see <i>Formatting Textual Report Items (Legacy Reports)</i> on page 405 and <i>Formatting Graphical Report Items (Legacy Reports)</i> on page 409).
Layout	[list and card items] Opens a dialog allowing you to modify the layout of the item (see <i>Controlling the Layout of List Report Items (Legacy Reports)</i> on page 409 and <i>Controlling the Layout of Card Report Items (Legacy Reports)</i> on page 410).
Collection	[list and book items] Opens a dialog allowing you to define the collection to which the report item will be applied (see <i>Modifying the Collection of an Item (Legacy Reports)</i> on page 402).
Selection	[list and book items] Opens a dialog allowing you to refine the selection of objects to which the report item will be applied (see <i>Selecting Objects to Display for a Report Item</i> on page 393).

Command	Description
Edit Title	Opens the item in a dialog allowing you to edit its title (see <i>Modifying the Title of an Item (Legacy Reports)</i> on page 402).
Delete	Removes the item from the Report Items pane. You can delete any item except the root.
Quick View	Generates a preview of the item (see <i>Previewing Your Report (Legacy Reports)</i> on page 413).

### **Modifying the Title of an Item (Legacy Reports)**

Package, object, and object-dependent items all have default titles, and you can insert Title items anywhere in the Report Items pane and as often as you want. You can edit the default text of these report items.

1. Right-click an item in the Report Items pane and select Edit Title to open it in the Editor dialog box.
2. Enter any appropriate changes to the title text. The user-defined check box will be automatically selected. To revert to the default value, clear this check box.
3. [optional] Clear the Show Title check box if you do not want to show the title of the item in the previewed or generated report.
4. [optional] Insert GTL variables that represent the name of the object, its parent, or model, etc at the cursor, by selecting them with the Insert button.
5. [optional] Click the Format button to open the Format dialog box, and select the appropriate formatting.
6. Click OK to return to the Report Editor. The first line of the title is displayed next to the item in the Report Items pane.

---

**Note:** You can edit the default titles of all report items in the report language resource file that is attached to your report. For more information, see *Customizing and Extending PowerDesigner > Translating Reports with Report Language Resource Files*.

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### **Modifying the Collection of an Item (Legacy Reports)**

You can extend the PowerDesigner metamodel to, for example, add new properties to an existing object (extended attributes), to create new objects (extended objects), and to create new connections between object types (extended and calculated collections and extended compositions). These latter collection extensions are not included, by default, in the object book report items in the Available Items pane of the Report Editor and must be added by hand.

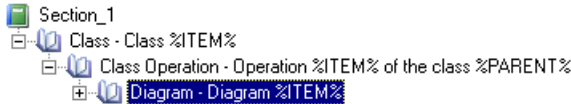
---

**Note:** If you create extended or calculated collections in your model and use the Report Wizard (see *Creating a Report with the Report Wizard* on page 364) to create your report, the generated report automatically creates a list for each type of extended and calculated collection inside the book item for each affected metaclass.

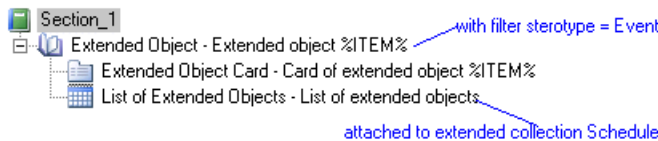
---

You can add any object list or book inside any other object book to allow you to represent any extended or calculated collection. Since there is no control over the location where you drop report items, and you are responsible for the global consistency of items and collections in your report. Once you have dropped the appropriate item, you can modify its collection and select a calculated or extended collection.

In the following example, a calculated collection is created on the operations metaclass that retrieves the diagrams where messages using a given operation are displayed. To display these diagrams in the report, a diagram item must be inserted inside the operation book item and the appropriate calculated collection selected for its collection:



In the following example, in order to manage the "schedule" and "event" concepts, the extended object <<event>> has been created, along with an extended collection of extended objects <<schedule>>. The Extended Object report item is added to the report and filtered on the stereotype Event (see *Selecting Objects to Display for a Report Item* on page 393) and the List of Extended Objects is added to the Extended Object book, with its collection set to Schedule:

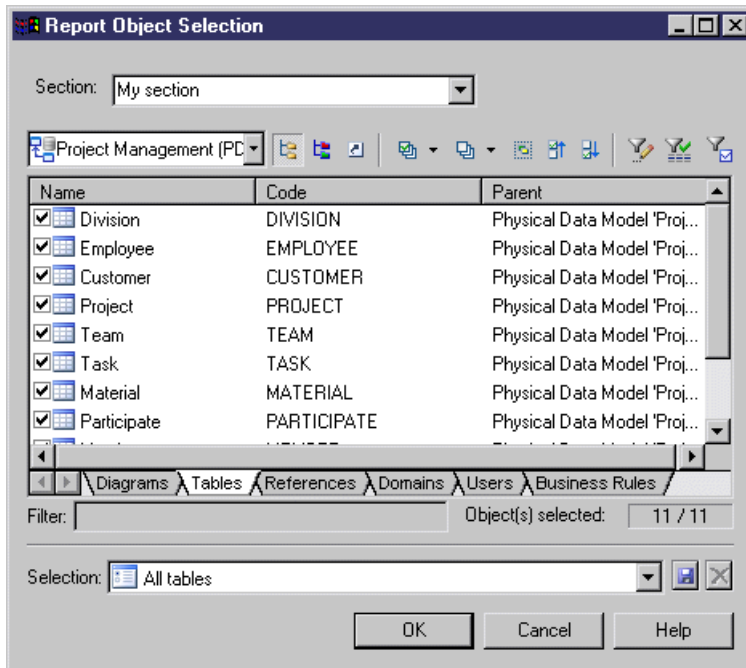


1. Drag and drop the appropriate book or list item under the selected book item in the Report Items pane.
2. Right-click the book or the list item and select **Collection** to open its Collection dialog box.
3. Select a collection in the Collection list and click **OK** to return to the Report Editor.

## Selecting Objects to Display in the Report

By default, the report includes all the objects in your model. You can restrict the objects included by making a selection, which is saved with the report.

1. Select **Report > Select Objects** from the Report Editor to open the Report Object Selection dialog box. All the objects (except any external shortcuts) are selected by default.



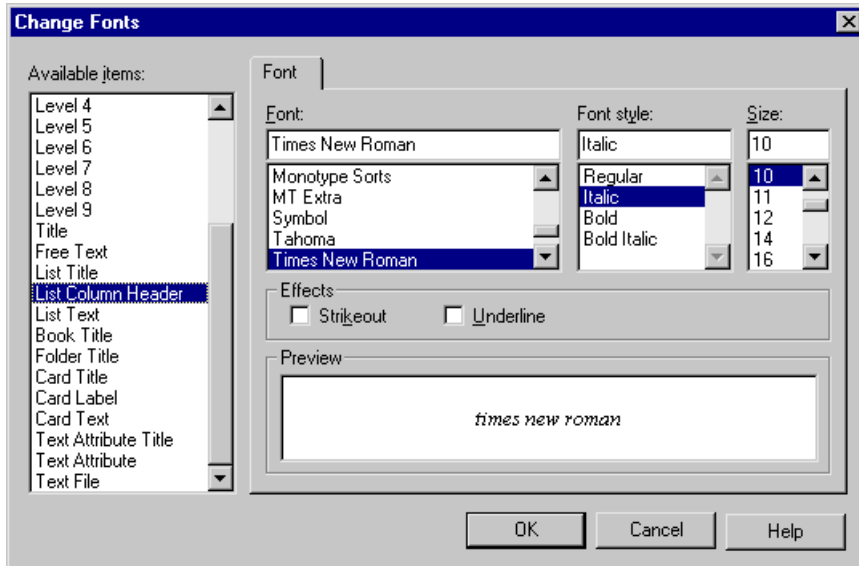
2. Select a report section from the Section list (see *Report Properties* on page 418).
3. [optional] Select a package from the package list.
4. Select the objects that you want to include in the report from each of the object-specific sub-tabs.
5. [optional] Specify a name for your selection in the Selection list and click the Save tool beside the list. The selection is saved as part of the model file (or in the .mmr file for a multi-model report).
6. Click OK to confirm your selection and return to the Report Editor.

For information about the tools in this dialog, see *Adding an Item from a Selection List* on page 118.

## **Specifying Default Fonts for Report Items (Legacy Reports)**

You can specify default fonts for report items, report templates and reports. The default fonts are saved in the registry.

1. Select **Report > Change Fonts** from the Report Editor window to open the Change Fonts Properties dialog box:



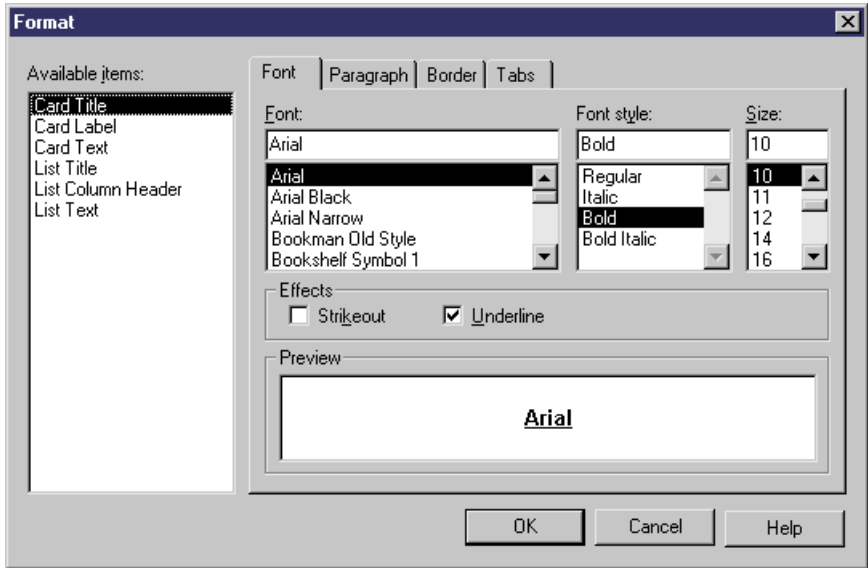
2. Select one or more available items in the left-hand list, and specify a font, style, size, and effects as appropriate.
3. Click OK to return to the Report Editor.

### **Formatting Textual Report Items (Legacy Reports)**

The **Format** dialog allows you to specify formatting for the selected report items.

You can access this dialog in any of the following ways:

- Select one or more text or list report items in the left-hand Available Items pane, and select **Report > Format** in order to set default formatting for them.  
Each instance of the item that you subsequently add to the right-hand Report Items pane will have this same formatting, but your changes will not affect any report items already in the Report Items pane.
- Select one or more text or list report items in the right-hand Report Items pane, and select **Report > Format** to change their formatting.



*Available Items*

Some report items contain more than one text element. You can format each separately or use the **Ctrl** or **Shift** keys to select several at once:

Report Item	Text Selections
Card items	<p>The following selections are available for card items (lists of properties), which are output in table format:</p> <ul style="list-style-type: none"><li>• Title - Title of the item, eg "Card of the Table"</li><li>• Label - Property name on a list of properties, eg "Table Code"</li><li>• Text – Value of a property, eg "EMPLOYEE"</li></ul>
CRUD Matrix items	<p>The following selections are available for CRUD Matrix items, which are output in table format:</p> <ul style="list-style-type: none"><li>• Matrix title – Title of the item, eg "CRUD Matrix "</li><li>• Matrix row and column – Resource and process name, eg " Check item (process name in rows)" and " Stock (resource name in columns)"</li><li>• Matrix text – CRUD value, eg " RU "</li></ul>

Report Item	Text Selections
Model- and object-dependent items	<p>The following selections are available for model- and object-dependent items, which are output in text format:</p> <ul style="list-style-type: none"> <li>• Title – Title of the item, eg " Table Description "</li> <li>• Text – Text of the description, annotation, or script, eg "This table describes different employee characteristics "</li> </ul>
List items	<p>The following selections are available for list items, which are output in table format:</p> <ul style="list-style-type: none"> <li>• Title – Title of the item, eg " List of Indexes "</li> <li>• Column Header – Heading of column, eg " Code "</li> <li>• Text – Value in the column, eg " PK_EMPLOYEE "</li> </ul>
Title page	<p>The following selections are available for the title page (see <i>Report Properties</i> on page 418), which is output in text format:</p> <ul style="list-style-type: none"> <li>• Title – Title of the report, eg "OOM Report"</li> <li>• Optional Fields – Text of the author, date, version or summary, eg " VB, 09.15.99, draft, report with lists only "</li> </ul>
Table of contents	<p>The following selections are available for the table of contents, which is output in text format:</p> <ul style="list-style-type: none"> <li>• TOC title – Title of the table of contents, eg " Table of contents "</li> <li>• Level <math>x</math> – Text of the different hierarchy levels in the table of contents, eg "2.1 Model information "</li> </ul>

**Note:** Select the levels to display from the **Show levels** list beneath the Available items pane of the **Format** dialog . To define the levels to be shown in the TOC of an HTML report, see *Report Properties* on page 418.

### Font Tab

The Format dialog Font tab allows you to specify a font, style, size, and effects for the text elements that you select in the left-hand Available items list.

### Paragraph Tab

The Format dialog Paragraph tab allows you to specify indentation, spacing, and alignment for the text elements that you select in the left-hand Available items list.

### Border Tab

The Format dialog Border tab allows you to specify elements of a frame around the text elements that you select in the left-hand Available items list. The following border formatting is available:

Option	Description
Left / Right / Top / Bottom	Inserts a line to the left, right, top, or bottom of all the occurrences of the selected text elements.
Box	<p>[card and list items only] Inserts a rectangle around all the occurrences of the selected text elements.</p> <p>For card items, inserts a rectangle that groups all the occurrences of Text Label (property names) including Text (corresponding property values).</p> <p>For list items, inserts a rectangle that groups all the occurrences of Column Header (heading of column, example Code), and also a rectangle that groups all the occurrences of Text (value in the column), if you have previously highlighted each of these text selections in the Available Items pane.</p>
Width	Specifies the line width for the Left, Right, Top and Bottom frame options
Box width	Specifies the line width of the box frame
From text	Specifies the amount of space from text to top, bottom, left, and right border

### Tab Tab

The Format dialog Tab tab allows you to specify tab positions and alignment for the text elements that you select in the left-hand Available items list, which is particularly useful for the layout of headers and footers (see *Modifying Report Section Headers and Footers (Legacy Reports)* on page 412).

The following tab formatting is available:

Option	Description
Tab stop position	Specifies the measurement for a tab stop
Default tab stops	Specifies the default spacing between tab stops
Alignment	Specifies how text is to be aligned at the tab stop. To change the alignment for an existing tab stop, click it in the Tab Stop Position box, and then click the new alignment option

## Editing Textual Report Items (Legacy Reports)

You can edit the text of a text paragraph or a text file in a text editor by double-clicking it or right-clicking it and selecting **Edit**.

For text paragraphs, you can select the following kinds of content:

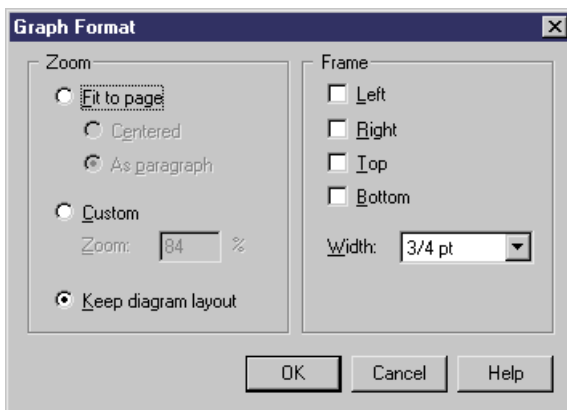
- User-defined - Enter text directly into the box. Click the Format button to apply formatting to selected text.
- Object attribute - Select an attribute from the list.



## Formatting Graphical Report Items (Legacy Reports)

You can access the report items Graph Format dialog in any of the following ways:

- Select one or more graphical report items in the left-hand Available Items pane, and select **Report > Format** in order to set default formatting for them.  
Each instance of the item that you subsequently add to the right-hand Report Items pane will have this same formatting, but your changes will not affect any report items already in the Report Items pane.
- Select one or more graphical report items in the right-hand Report Items pane, and select **Report > Format** to change their formatting.



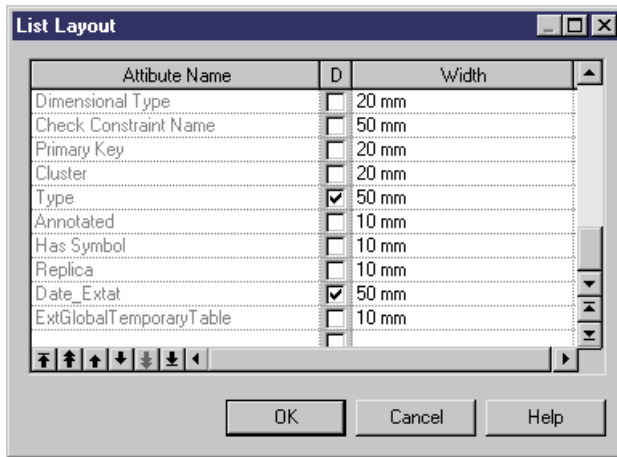
The following options are available in the Graph Format dialog:

Option	Description
Zoom	Specifies the resizing of the graphic in the report. You can choose between: <ul style="list-style-type: none"> <li>• Fit to page</li> <li>• Custom zoom</li> <li>• Keep diagram layout - one page of the diagram per report page</li> </ul>
Frame	Specifies the borders to insert around the graphic.

## Controlling the Layout of List Report Items (Legacy Reports)

List report items are published as tables, ordered by the name or code of the objects. You can specify which attributes will be displayed, in which order, and the width of their columns.

1. Select one or more list report items in the Report Items pane and select **Report > Layout** to open the List Layout dialog, which lists all the attributes available for the object:



2. Enter any appropriate layout changes as follows:

- Use the arrow buttons at the bottom of the dialog to reorder columns in the table.
- Select the D column next to a property to display it in the table.
- Enter a width in the width column. You can specify the width in millimeters (mm), inches (in) or as a percentage of the table width.

3. Click OK to return to the Report Editor.

---

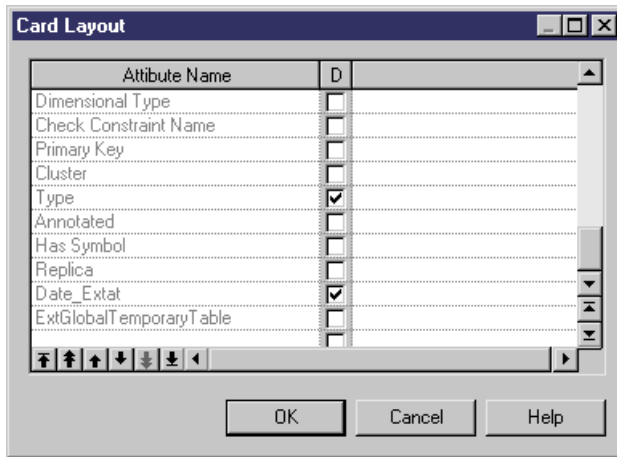
**Note:** If extended attributes are specified for the object, they will be available for selection in the List Layout dialog. You can choose to select all extended attributes or only those whose value has been modified using the **Display > All** and **Display > Only modified ones** commands from the list item contextual menu.

---

### Controlling the Layout of Card Report Items (Legacy Reports)

Card report items represent the property sheets of individual objects and are published as two-column tables. You can specify which attributes will be displayed, and in which order.

1. Select one or more card report items in the Report Items pane and select **Report > Layout** to open the Card Layout dialog, which lists all the attributes available for the object:



2. Enter any appropriate layout changes as follows:
  - Use the arrow buttons at the bottom of the dialog to reorder properties in the table.
  - Select the D column next to a property to display it in the table.
3. Click OK to return to the Report Editor.

---

**Note:** Select the Displayed check box for the Class Name attribute to distinguish shortcuts cards from the other object types cards in the generated report.

---

## **Suppressing the Titles of Report Items (Legacy Reports)**

You can suppress the title of any item in your report. The following illustration shows a portion of a report, with the title of the process card displayed:

### **1 Process Process\_1**

#### **1.1 Card of process Process\_1**

<i>Name</i>	Process_1
<i>Code</i>	Process_1
<i>Comment</i>	

This illustration shows the same report with the title of the process card suppressed:

### **1 Process Process\_1**

<i>Name</i>	Process_1
<i>Code</i>	Process_1
<i>Comment</i>	

Right-click an item in the Report Items pane and deselect the Show Title command.

*or*

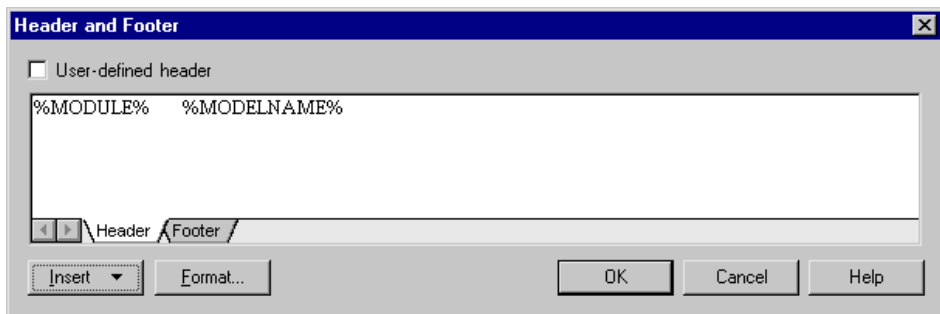
Double-click an item to open the Editor dialog box, clear the Show Title check box, then click OK.

## **Modifying Report Section Headers and Footers (Legacy Reports)**

The Report includes a default header and footer that you can modify.

For more information about the default header and footer, including specifying separate headers and footers for each section of your RTF report, see *Report Properties* on page 418.

1. Right-click the root section item in the Report Items pane and select **Header/Footer** (or click the **Header & Footer** button in the Presentation Options page of the Report Creation Wizard) to open the Header and Footer dialog:



2. Enter any appropriate changes to the header text. Edit the Footer text by clicking on the **Footer** sub-tab. You can use any of the variables available to the RTF template (see *RTF Presentation Templates* on page 424).

If you change the default header or footer text, then the User-Defined check box is selected, to indicate that you have overridden the default values in the associated report language resource file. To revert to the default value, clear the check box. For more information about report language resource files, see *Customizing and Extending PowerDesigner > Translating Reports with Report Language Resource Files*.

---

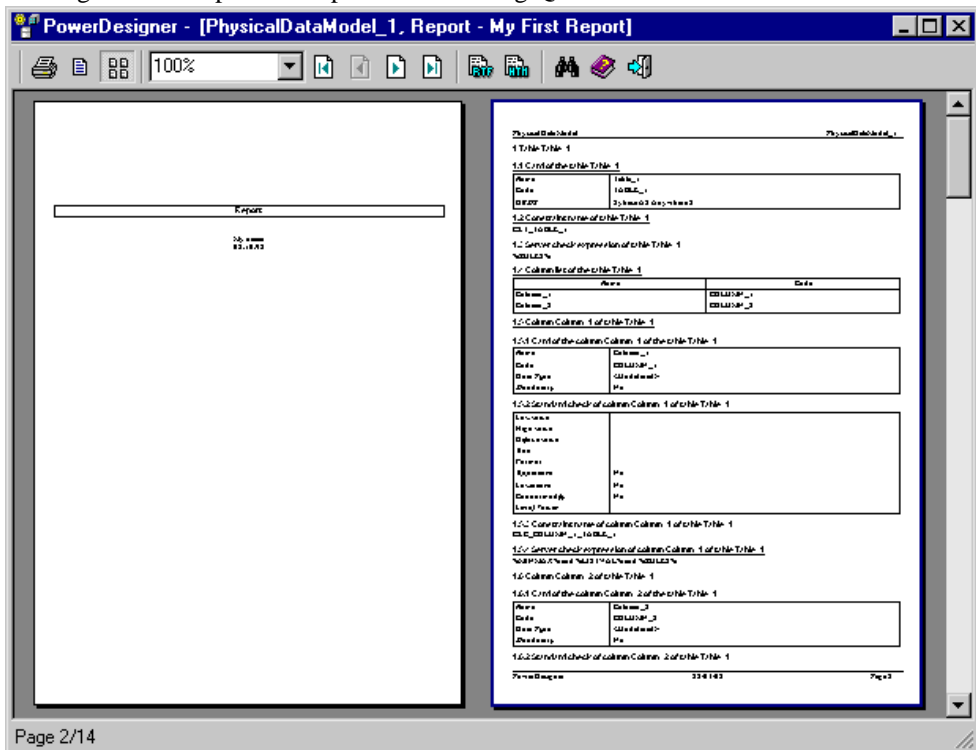
**Note:** Use the key combination **Ctrl+Tab** to insert tabulations in a header or open the **Tabs** tab in the Format dialog box (see *Formatting Textual Report Items (Legacy Reports)* on page 405) to set tab stop values.

---





3. Click **OK** to return to your report.


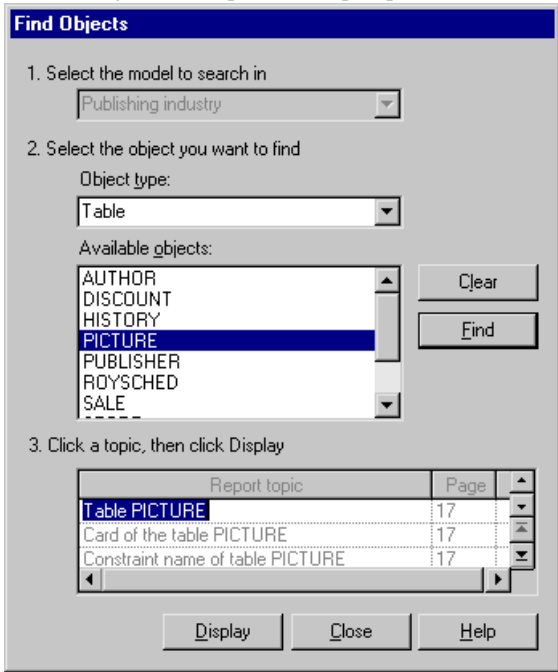


## Previewing Your Report (Legacy Reports)

You can preview your report by selecting **Report > Print Preview** or by clicking the **Preview** tool in the End page of the Report Creation Wizard. You can preview a report item by right-clicking it in the Report Items pane and selecting **Quick View**.



The following tools are available in this window:

Tool	Goes to preview
	Print the report.
	Preview the report one or two pages at a time.
	Go to the first, previous, next, or last page of the report.
	Generate the report in HTML or RTF format.

Tool	Goes to preview								
	<p>Open the Find Objects dialog. Specify the model (for multi-model reports), object type, and object you want to find, and then click <b>Find</b> to display a list of topics that mention the object. Then select a topic in the list and click <b>Display</b> to go to that topic in the report preview:</p>  <p>The Find Objects dialog box is shown with the following details:</p> <ul style="list-style-type: none"> <li><b>Find Objects</b> (Title bar)</li> <li>1. Select the model to search in: Publishing industry (dropdown)</li> <li>2. Select the object you want to find:             <ul style="list-style-type: none"> <li>Object type: Table (dropdown)</li> <li>Available objects: AUTHOR, DISCOUNT, HISTORY, <b>PICTURE</b>, PUBLISHER, ROYSCHED, SALE (list box)</li> <li>Buttons: Clear, Find</li> </ul> </li> <li>3. Click a topic, then click Display:             <table border="1"> <thead> <tr> <th>Report topic</th> <th>Page</th> </tr> </thead> <tbody> <tr> <td>Table PICTURE</td> <td>17</td> </tr> <tr> <td>Card of the table PICTURE</td> <td>17</td> </tr> <tr> <td>Constraint name of table PICTURE</td> <td>17</td> </tr> </tbody> </table> </li> <li>Buttons: Display, Close, Help</li> </ul>	Report topic	Page	Table PICTURE	17	Card of the table PICTURE	17	Constraint name of table PICTURE	17
Report topic	Page								
Table PICTURE	17								
Card of the table PICTURE	17								
Constraint name of table PICTURE	17								
	Help								
	Close the preview.								

## Upgrading Legacy Reports for Use with the Graphical Editor

You can upgrade a legacy report to allow it to be edited in the new graphical Report Editor at any time from the Browser or the List of Reports. You can upgrade a legacy report template from the List of Report Templates.

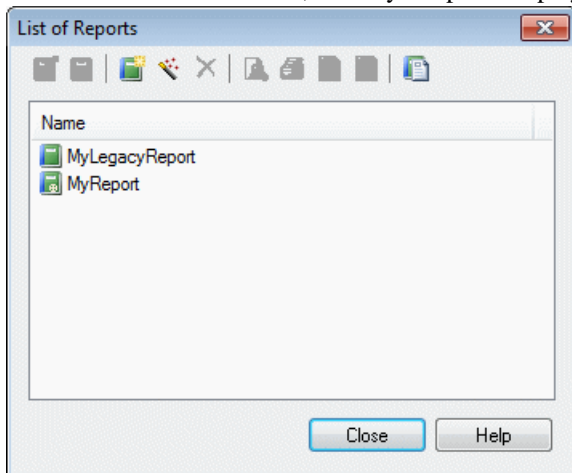
**Note:** Upgrading a legacy report cannot be undone. You may want to copy your legacy report (see *Copying and Pasting Objects* on page 123) before upgrading it, to use it for reviewing the upgraded version

To upgrade a report from the Browser, right-click it and select **Upgrade to New-Style Report**.

To upgrade a report from the List of Reports, select **Report > Reports** to open the list, select the report to upgrade, and then click the **Upgrade to New-Style Report** tool.

To upgrade a report template from the List of Report Templates, select **Report > Report Templates** to open the list, select the template to upgrade, and then click the **Upgrade to New-Style Report** tool.

In both the Browser and list, new-style reports display a small overlay to identify them:

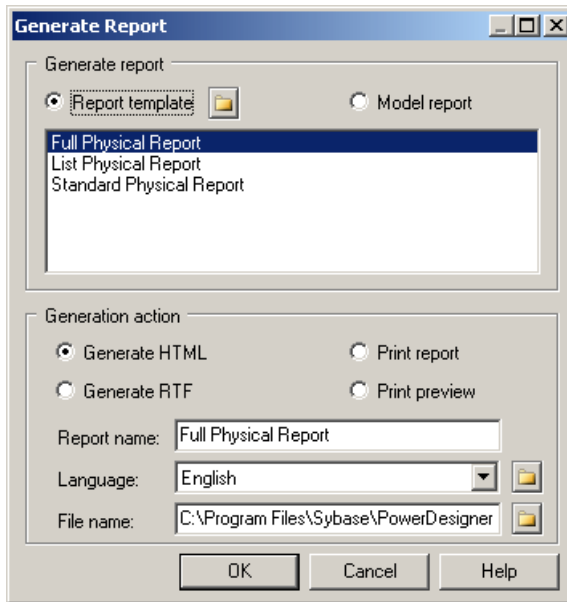


## Generating a Model Report

---

You can generate your report directly from the Report Editor by clicking the **Generate Web Report** or **Generate Rich Text Document** tools in the toolbar or selecting the corresponding commands from the **Report** menu. You can generate any report in the model or a generic report from a template from the **Generate Report** dialog.

1. Select **Report > Generate Report** to open the Generate Report dialog.



2. Select whether to generate your report from a:

- **Report template** – Select a standard template or one of your own (see *Report Templates* on page 417). Click the **Browse** button to change the folder where your templates are stored.
- **Model report** – Select any report defined in the model.

---

**Note:** To generate a report directly from its Browser entry, right-click it, and select **Print, Generate > RTF**, or **Generate > HTML**.

---

3. Select how you want to generate your report:

- **Generate HTML** – Generates a set of files to display your report in a Web browser.
- **Generate RTF** - Generates a Rich Text Format file for opening in Microsoft Word or another RTF editor.
- **Print report** – Prints the report directly.
- **Print preview** – Generates a preview of the report (see *Previewing a Report or Report Item* on page 397).

4. [for HTML or RTF only] Specify a **Report name** and **File name** for the generated files.

5. Specify the report **Language** to use for generating item titles and other report artifacts.

6. Click **OK** to begin the generation.



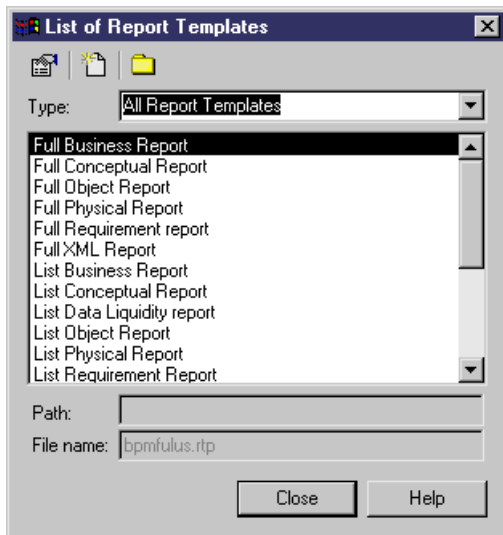
## Report Templates

A report template specifies content and formatting for a report (or, for a multimodel report, a section). PowerDesigner provides a set of standard report templates, and you can create your own.

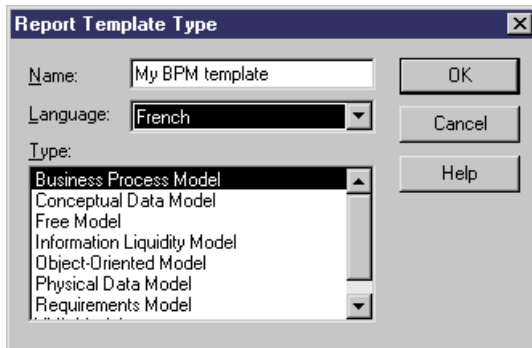
### Creating a Template from the List of Report Templates

You can create a report template from scratch, or based on an existing template, from the List of Report Templates.

1. Select **Tools > Resources > Report Templates** to open the List of Report Templates:



2. Click the **New** tool and enter a name for your template:



3. Select a language and model type for the template, and then click **OK** to open the empty template in the Report Template Editor.
4. Edit the report template as necessary (see *The Report Editor* on page 377).
5. Select **File > Save** to save the template and make it available for selection when you create a report.

### **Saving a Report or Report Section as a Report Template**

You can save your report (or a section in a multimodel report) as a report template for use with other reports.

1. In the Outline or Design view, click in the section you want to save as a template.

---

**Note:** For legacy reports, click the tab at the bottom of the Report items pane to select the section you want to save.

---

2. Select **Report > Create Template From Section**.
3. Select **File > Save**, enter a name for the template, and click **OK** to save it for future use.

### **Modifying and Saving a Template**

You can modify a report template from the List of Report Templates.

1. Select **Report > Report Templates** to open the List of Report Templates

---

**Note:** You can open the List of Report Templates from the List of Reports by clicking the **Manage Report Templates** tool.

---

2. Select a template type to display the list of available templates of that type.
3. [optional] Click the **Path** tool to select a different directory in which to search for templates.
4. Select a template and click the **Properties** tool to open it in the Report Editor.
5. Make any appropriate changes to the template and then click the X at the top right of the Design view to close it and be prompted to save your changes.

### **Report Properties**

To open the report property sheet, select **Report > Report Properties** from the Report Editor window or right-click the report in the Browser and select **Properties**.

The report property sheet General tab contains the following properties:

Property	Description
Name/Code/ Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Language	Specifies the language of the report. Click the tools to the right of this field to edit the selected report language resource file or to change the path that populates the list. For more information see <i>Customizing and Extending PowerDesigner &gt; Translating Reports with Report Language Resource Files</i> .
No paragraph numbering	Suppresses section numbers in RTF and printed reports. Paragraph numbering is not used in HTML reports.
Generate empty paragraphs	Generates titles for all book items, even if they have no content.

### *Title Page Tab (Legacy Reports)*

The report property sheet Title Page tab allows you to specify the contents of a title page for your report:

Property	Description
No title page/ Include title page	Select whether to include a title page. Selecting <b>Include title page</b> enables the other fields on this tab.
Title	Specifies the title of the report. Default: The name of the report.
Author	Specifies the report author. Default: User shown on the <b>Version Info</b> tab.
Date	Specifies the date of the report. Default: Today's date.
Version	Specifies the version number of the report. Default: Version in the model property sheet.
Summary	Specifies any additional text to be printed on the title page.

Click the **Format** button to customize the formatting of these fields.

**Note:** For HTML reports, a home page is generated instead of a title page. Title pages are never generated for RTF reports generated with a report template.

### *RTF Format Tab*

PowerDesigner provides a set of predefined RTF presentation templates, style sheets, and header and footer files for generating RTF reports, which are located in the **Resource**

## CHAPTER 12: Reports

Files\RTF Report Templates directory. You can use these files as a basis to create your own templates.

The report property sheet RTF Format tab allows you to specify an RTF presentation template for your report, and contains the following properties:

Property	Description
Template	Specifies the RTF presentation template to be used to style the report. Click the tools to the right of this field to edit the selected template (see <i>Referencing Object and Model Properties</i> on page 396) or browse to an alternate template directory.
Use sections header and footer	<p>Specifies to use the header and footer defined in each report section instead of those defined in the RTF presentation template (see <i>Modifying Report Section Headers and Footers</i> on page 395). If you want to preserve the header and footer of the title page and of the table of contents page, you should add a section break after the table of contents.</p> <p>This option is recommended when formatting a multi-model report, as otherwise all the pages of the report will have the same header and footer.</p>

---

**Note:** Click the **Set As Default** button to specify your current settings as the default for RTF reports. To revert to the previously saved values, click the **Default** button.

---

### HTML Format Tab

PowerDesigner provides a set of predefined HTML presentation templates, style sheets and header and footer files for generating HTML reports, which are located in the Resource Files\HTML Report Style Sheets directory. You can use these files as a basis to create your own templates.

The report property sheet HTML Format tab allows you to specify HTML presentation options for your report, and contains the following properties:

Property	Description
Template	Specifies the HTML presentation template to be used to style the report. Click the tools to the right of this field to preview, save, or delete the selected template, or to browse to an alternate template directory.
Style sheet	Specifies the style sheet to be used to style the report as an absolute or relative path or a URL. Click the tools to the right of this field to edit the selected stylesheet (see <i>Referencing Object and Model Properties</i> on page 396) or browse to an alternate style sheet.

Property	Description
Header / Footer	<p>Specifies the HTML file to be used as the report header or footer as an absolute or relative path or a URL. Click the tools to the right of the field to edit the selected file (see <i>Referencing Object and Model Properties</i> on page 396) or browse to an alternate file.</p> <p>You can also specify the height, in pixels, of the header and footer.</p>
Home page	<p>Specifies the HTML file to be used as the report homepage as an absolute or relative path or a URL. Click the tools to the right of this field to edit the selected file (see <i>Referencing Object and Model Properties</i> on page 396) or browse to an alternate file.</p>
Table of contents	<p>These options control the format of the table of contents. You can specify:</p> <ul style="list-style-type: none"> <li>• <b>Level</b> - the maximum number of levels to display in the HTML table of contents. Default: 4.</li> <li>• <b>Width</b> - the width of the frame as a percentage of the total width of the report window. Default: 25%.</li> <li>• <b>TOC at right</b> - whether the TOC will be generated on the left (default) or right side of the screen.</li> </ul> <p>You can reduce the size of the HTML TOC by right-clicking book report items and selecting:</p> <ul style="list-style-type: none"> <li>• <b>Show contents in HTML TOC</b> - deselect this option to display only the title of the item without its contents in the TOC.</li> <li>• <b>Show book title in HTML TOC</b> - deselect this option to remove the title of the book item from the table of contents. Automatically deselects the Show contents in HTML TOC option.</li> </ul>
Image Format	<p>Specifies the file format for graphic files to be generated and embedded in the report:</p> <ul style="list-style-type: none"> <li>• SVG - XML-based language for Web graphics, which allows you to interact with the graphics. Note that SVG is not supported for graphics embedded in RTF in PowerDesigner property fields, and such graphics will be generated as PNG.</li> <li>• PNG – higher quality than JPEG.</li> <li>• JPEG – smaller file size than PNG.</li> </ul>
List format	<p>Specifies the format for lists. You can specify the number of rows you want to display per page in the list results and the number of links to additional results displayed below the list. Additional results are numbers with hyperlinks to other pages containing the next rows of the list.</p>

Property	Description
Web browser	[legacy reports] Specifies the primary type of browser that will be used to view the HTML report in order to correctly generate SVG graphics. You can specify HTML5-compliant browsers or Internet Explorer 6,7, or 8 (which support SVG via the Adobe SVG plug-in).
Add page break for top level list and cards	[legacy reports] Inserts a page break before each top level list and card to avoid long HTML pages.

**Note:** Click the **Set As Default** button to specify your current settings as the default for HTML reports. To revert to the previously saved values, click the **Default** button.

Depending on the type of location (local or UNC paths, or URL), style sheet files, header and footer files and home page files are used as follows:

Location	Use
Local path or UNC path	The file is copied into the report generation folder.
URL	The file is referenced in its location.

We recommend that you gather your style sheets and header and footer files in a subfolder with the same name as the presentation template file with which they are associated to ensure that the structure of links between them is simplified.

For example, the *Header\_Blue.html* header uses files that are gathered in the *Header\_Blue\_files* folder:



### Sections Tab (Legacy Reports)

You can use sections to structure your report. Reports must contain at least one *section*, and sections are displayed as tabs at the bottom of the Report Items pane of the Report Editor. Each section can only report on one type of model so, in a multi-model report, each different type of model (PDM, OOM, BPM, etc) must have its own section.

The report property sheet Sections tab allows you to create, configure, and delete report sections, and contains the following properties:

Property	Description
Name	Specifies the name of the section, which will be displayed on the sub-tab at the bottom of the Report Editor window. You can also change the name of a section by right-clicking the section node in the Report Editor and selecting <b>Rename</b> .
Model	[multi-model reports only] Specifies the model on which the section will report.
Template	Specifies the template upon which the section is based. You can choose between: <ul style="list-style-type: none"> <li>• <i>None [default]</i> – creates an empty section.</li> <li>• <i>Full Model Type Report</i> – provides lists of all the types of objects in the model, together with detailed information on each object.</li> <li>• <i>List Model Type Report</i> – provides lists of all the types of objects in the model.</li> <li>• <i>Standard Model Type Report</i> – provides lists of all the types of objects in the model, together with detailed information on each of the main objects.</li> </ul>
Apply Template	Re-applies the specified template to the section, deleting any modifications you may have made.  <b>Note:</b> You cannot undo this action.

---

**Note:** You can launch the Report Wizard (see *Creating a Report with the Report Wizard* on page 364) from the Report Editor to configure the present section. The wizard configures only one section at a time, and will delete the current contents of the section. To configure a second section, select it using the section tabs at the bottom of the window, and relaunch the wizard.

---

## Valid Codepage

By default, PowerDesigner generates in the HTML page a character set (charset) built from the current language of the report. If this is not correct for your needs, you can change the charset.

1. Right-click the report in the Browser, and select Properties from the contextual menu to open its property sheet.
2. On the General tab, click the Properties button to the right of the Language field to open the Report Language resource file in the Resource Editor.
3. Expand the **Report Titles > Common Objects** category, and set the appropriate values for the CharSet and CodePage items.

For information about working with charsets and coding pages, see: <http://www.w3.org/International/tutorials/tutorial-char-enc/>.

---

**Note:** You can translate the navigation buttons (Previous, Next, Home) generated by default in your HTML report using HtmlNext, HtmlPrevious and HtmlHome items in the Report Titles \Common Objects category of the Report Language Editor. For more information, see

## **RTF Presentation Templates**

An RTF presentation template file has an .RTF extension and allows you to define the header, footer, title page, table of contents, and general style of your RTF report. You can insert pictures, page borders and variables in an RTF presentation template.

The presentation template takes into account all the presentation options that you have defined in the Report Wizard or Report Editor, except the table of contents report item as this is defined in the RTF presentation template.

---

**Note:** If you open a report saved in a previous version, the RTF Template list is set to <None>.

---

## **HTML Presentation Templates**

An HTML presentation template file (\*.htmltpl) allows you to define the header, footer, home page, and style sheet (for font, color, background, size, margin, and alignment) for your HTML report. The formatting defined in your style sheet will override any defined in the Report Wizard or Report Editor.

---

**Note:** If you open a report saved in a previous version, the HTML presentation template has the values of the default HTML presentation template or the Presentation template box will be set to (<None>).

---

### *Style Sheet Structure*

The following table describes the use of class names in the report style sheets:

<b>Class names</b>	<b>Description</b>
BODY	Background styles for all report pages, except the home page frame and the browser frame page.
.BROWSERBODY	Background styles for the browser page.
.HOMEBODY	Background styles for the home page.
.TEXT	Font styles for text blocks, like description, annotation, etc.
.TITLE	Font styles for the title of the home page.
TABLE	Styles for tables.
TD	Styles for table cells.



Class names	Description
Table.GRID TABLE.GRID TD.HEADER TABLE.GRID TD TABLE.GRID TD TD2	Styles for the tables, header cells, even row, and odd row cells of object lists.
Table.FORM TABLE.FORM TD.HEADER TABLE.FORM TD	Styles for the tables, row header cells, and value cells of object cards.
Table.TEXT TABLE.TEXT TD	Styles for the tables and the cells of tables around the text blocks.
Table.TITLE TABLE.TITLE TD	Styles for the tables and the cells of tables around the home page title.
Table.GRAPHICS TABLE.GRAPHICS TD	Styles for the tables and the cells of tables around graphics.
H1, H2, H3	Styles for level 1, 2, and 3 headings.
HR	Styles for separator lines.
A:LINK A: VISITED A: HOVER	Colors for non-visited, visited, and highlighted hyperlinks.
.BROWSER	Font styles for the browser.
A.BROWSER:LINK A.BROWSER:VISITED A.BROWSER:HOVER	Colors for non-visited, visited, and highlighted hyperlinks of the browser.
TABLE.NAVGROUP TABLE. NAVGROUP TD	Styles for the tables and the cells of tables around the navigation buttons.
.NAVBUTTON A.NAVBUTTON:LINK A.NAVBUTTON:VISITED A.NAVBUTTON:HOVER	Font styles for navigation buttons and for non-visited, visited, and highlighted hyperlinks of navigation buttons.



## PART III

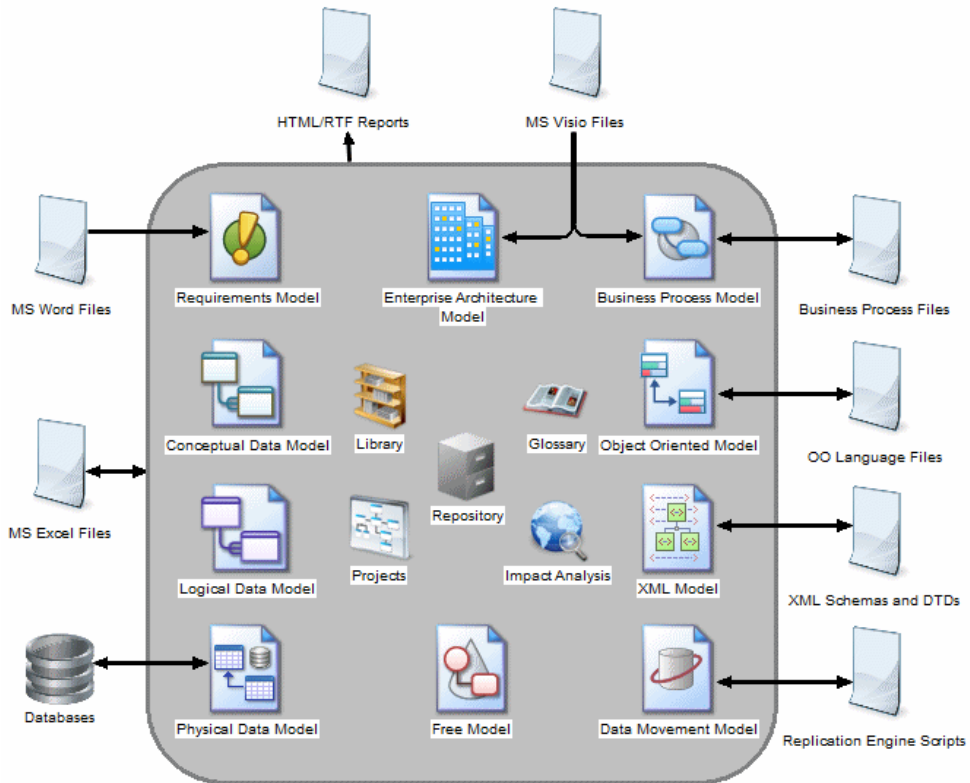
# Linking and Synchronizing Models

The chapters in this part describe the PowerDesigner features that help you create links between models and trace the impact of changes between models.



# Getting Started with Linking and Syncing

The PowerDesigner Enterprise Modeling environment allow you to create and exploit complex interdependencies between objects to model interconnected systems and view them in many different ways.



A single data item such as a product name can be implicated in multiple systems, which are modeled in a number of interdependent models. It may also be represented at various levels of abstraction in conceptual, logical, and physical data models, or in different contexts such as object-oriented, XML, business process, and enterprise architecture models.

Instead of defining this same object and all its accompanying metadata multiple times, PowerDesigner allows you to generate these instances or in other ways link them together, and provides powerful tools for tracking and analyzing the dependencies between them.

---

**Note:** When working with multiple connected models, we recommend that you group your models together into a project (see *Chapter 3, Projects and Frameworks* on page 47).

---

## Creating Links Between Models

---

PowerDesigner provides many ways to link the objects of your models together.

You can create the following kinds of links between models:

- *Generation links* - are created during model or object generation. Each generated object is linked with its origin object.
  - Model Generation - generates one model from another and allows subsequent synchronization on demand (see *Generating Models* on page 435).
  - Object Generation - allows you to define the generation of objects from one model to another with subsequent synchronization on demand (see *Generating Model Objects* on page 447).
- *Shortcuts* - create a reference to an object in another model. You either create shortcuts explicitly in order to share or reuse an object in another model (see *Creating Shortcuts* on page 457) or implicitly when creating other kinds of links. To create any of the kinds of links in this list, the target model in which the referenced object resides must be open in your workspace:
  - RQM Traceability Links - link requirements with design objects that are intended to satisfy them (see *Requirements Modeling > Requirements Views > Requirements (RQM) > Linking Requirements with Design Objects and External Files*).
  - EAM Object Export/Import - link enterprise architecture objects with the design objects that will implement them (see *Enterprise Architecture Modeling > Importing to and Generating and Exporting from an EAM > Exporting and Importing Objects to and from Other Models*).
  - BPM Data Export/Import - link data objects in the BPM with objects in other models (see *Business Process Modeling > Analysis BPM > Data (BPM)*).
  - Extended Attributes and Collections - allow you to extend the PowerDesigner metamodel to define new kinds of links between objects (see *Extending Objects* on page 154).
  - Object Mappings - specify connections between certain predefined types of objects (see *Chapter 16, Object Mappings* on page 473).
  - Related Diagrams - specify connections between objects and other diagrams in which they are not present (see *Specifying Diagrams as Related Diagrams* on page 172).
  - Extended Dependencies - specify connections between any objects without restrictions (see *Creating Traceability Links* on page 431).
- *Object Replications* - duplicate an object from one model to another and allow you to vary the properties you choose while keeping the rest synchronized with the original object (see *Creating Replicas* on page 463).

## Viewing Links Between Models

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PowerDesigner provides an array of tools to allow you to view and analyze the links created between your models.

Some or all of the following tools are available to you to view, analyze and edit the links between your models:

- Project Diagram - provides a high-level read-only view of the links between the models in your project (see *Project Diagrams* on page 50).
- Dependency Matrix - provides an editable view of all the links between the two object types that you specify in the matrix definition (see *Dependency Matrices* on page 180).
- Generation Links Viewer - provides a read-only view of all the model or object generation links between the present model and any models it is associated through generation (see *The Generation Links Viewer* on page 450).
- Mapping Editor - provides an editable view of all the mappings between the present model and any models it is associated with through mappings (see *The Mapping Editor* on page 477).
- Multi-Model Report - provides a configurable report in HTML or RTF format documenting your models and the links between them (see *Creating a MultiModel Report* on page 376).
- Impact and Lineage Analysis - provides a configurable analysis of the objects that impact and/or are impacted by the selected objects (see *Chapter 17, Impact and Lineage Analysis* on page 499).
- Object Lists - can include shortcuts to objects of the selected type if the **Include Shortcuts** tool is selected (see *Object Lists* on page 108).
- Object property sheets (see *Object Properties* on page 98) - provide information on various forms of links on the following tabs:
  - Related Diagrams (see *Specifying Diagrams as Related Diagrams* on page 172)
  - Traceability Links (see *Creating Traceability Links* on page 431)
  - Mappings - where available (see *Chapter 16, Object Mappings* on page 473)
  - Requirements - if enabled (see *Requirements Tab* on page 105)
  - Dependencies - lists the objects that depend on the object (see *Dependencies Tab* on page 106)

## Creating Traceability Links

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You can specify any kind of connection between PowerDesigner objects through traceability links. These links can be created between objects of any type of model. They are used for documentation purposes only, and are not interpreted or checked by PowerDesigner.

You create an traceability link between objects in the same diagram by selecting the **Link/Traceability Link** tool in the Toolbox. Click inside the influent object symbol and, while

continuing to hold down the mouse button, drag the cursor and release it on the dependent object symbol.

In the following example, the CDM entities `School` and `Work` do not have any direct calculable connection, but `Work` is shown as being dependent on `School` through a traceability link:



You can refine the meaning of traceability links by applying stereotypes to them to identify the kind of dependency represented. You can enter a stereotype name by hand in the **Stereotype** column of the **Traceability Links** tab of the dependent object, or select a value from the list if you have previously defined stereotypes in an extension (see *Extension Files* on page 275).

### Creating Traceability Links Between Objects from Different Models

You can create traceability links between any objects (including objects in different models) from the dependent object's property sheet. The model that contains the influent object must be open in the workspace.

1. Open the property sheet of the object, and click the **Traceability Links** tab.
2. Click the **Add Objects** tool to open the Add Objects dialog box.
3. Select a model from among the models open in the workspace from the Model box, (optionally) a package from the list, and an object from one of the sub- tabs and then click **OK** to add a traceability link to it.

The traceability link you have created is listed in the List of Traceability Links (available from **Model > Traceability Links**) and, if the objects are in the same diagram, as an oriented link symbol.

4. [optional] Enter a type to further identify the traceability link you have just created in the **Link Type** column. You can specify link types for selection (see *Creating New Types of Traceability Links* on page 432).
5. Click **OK** to close the property sheet and return to the diagram.

### Creating New Types of Traceability Links

You can enter a type directly into the **Link Type** column, or populate the list with link types for re-use.

1. Open the **Traceability Links** tab of any object.
2. Click the **Types and Grouping** tool and select **New Link Type**.
3. Enter a **Name** for the link type and, optionally, a **Comment** to explain its purpose. The name will appear in the list in the **Link Type** column.
4. [optional] If you want to view the new type in the PowerDesigner Resource Editor, select the **Open Resource Editor** checkbox.



All extensions are stored in PowerDesigner resource files. For detailed information about working with these files, see *Customizing and Extending PowerDesigner > Extension Files*.

5. Click **OK** to exit the dialog and return to the **Traceability Links** tab.

The new type is available for selection in the **Link Type** column.

### **Grouping Traceability Links by Object or Link Type**

You can display the links on an object's **Traceability Links** tab as a single list or grouped by object type or link type by clicking the **Types and Grouping** tool and selecting the appropriate grouping command.

When you select **Group by Object Type** or **Group by Link Type**, the different types of objects or links are displayed on separate sub-tabs. To add a link to a new object type or with a new link type, click the plus sign on the leftmost sub-tab.



# Generating Models and Model Objects

PowerDesigner provides a number of predefined model-to-model generation paths along with mechanisms for generating any model objects into any other objects in another type of model.

## Generating Models

PowerDesigner provides powerful capabilities for generating one model from another, and keeping the two models synchronized. Thus, you could model your data at an abstract level in a CDM, generate an LDM to model implementation-neutral features, and then generate multiple PDMs for various DBMSs.

The following table shows which model types you can generate from each model type. The left column lists the source model and the column headings the model types that can be generated from it:

	BPM	CDM	LDM	PDM	DMM	OOM	XSM
BPM	X						
CDM		X	X	X		X	
LDM		X	X	X			
PDM		X	X	X		X	X
DMM					X		
OOM		X		X		X	X
XSM				X			X

1. Select **Tools**, and then one of the following to open the appropriate Model Generation Options Window:

- Generate Business Process Model... Ctrl+Shift+B
- Generate Conceptual Data Model... Ctrl+Shift+C
- Generate Logical Data Model... Ctrl+Shift+L
- Generate Physical Data Model... Ctrl+Shift+P
- Generate Data Movement Model...
- Generate Object-Oriented Model... Ctrl+Shift+O

- Generate XML Model... Ctrl+Shift+M
2. On the **General** tab, select a radio button to generate a new or update an existing model, and complete the appropriate options. For more details, see *Model Generation Options* on page 436.
  3. [optional – PDM-PDM generation only] Click the **DBMS Preserve Options** tab and set any appropriate options.
  4. [optional] Click the **Detail** tab and set any appropriate options.
  5. [optional] Click the **Target Models** tab and specify the target models for any generated shortcuts.
  6. [optional] Click the **Selection** tab and select or deselect objects to generate. For information about using the tools on this tab, see *Adding an Item from a Selection List* on page 118.
  7. Click **OK** to begin generation.

## Model Generation Options

You can customize the generation of your models by selecting model generation options.

### General Tab

The General tab lets you specify the new model to be generated or existing model to be updated. When generating a new model, you must specify the following options:

Option	Description
DBMS, Object, XML, or Process language	Specifies the definition file for the model to be generated. By default, PowerDesigner creates a link to this file. To copy the definition and save it in your model file, click the <b>Embed Resource in Model</b> button.
Name / Code	Specifies the name and code for the model to be generated.  Click the <b>Configure Model Options</b> button to specify naming conventions (see <i>Naming Conventions</i> on page 143) and other model options for the model to be generated.

When updating an existing model, you must specify the following options:

Option	Description
Select model	Specifies the target model to be updated. Select a model that has already been generated from the current model from the list, or click the ellipsis button to the right to open a list of other models of the same type open in the workspace.
DBMS, Object, XML, or Process language	Displays the definition file of the model to be updated.

Option	Description
Preserve modifications	Allows you to review the changes to be made to the model (see <i>Chapter 7, Comparing and Merging Models</i> on page 223). If this option is not selected, generated objects will replace objects with the same name in the model.

#### *DBMS Preserve Options Tab*

This tab is only available when you generate a PDM from another PDM, and allows you to choose to preserve, where possible, the values associated with:

- Physical options - for relevant objects
- Triggers and stored procedures – If the target belongs to a different DBMS family, triggers are automatically rebuilt.
- Database objects – Only objects supported by the target DBMS will be generated.
- Extended attributes

#### *Detail Tab*

The Detail tab contains options to control the generation of model objects.

Option	Description
Check Model	Invokes a model check before generation, and stops generation if errors are found. You can configure specific model checks before generation by selecting <b>Tools &gt; Check Model</b> (see <i>Checking Models</i> on page 137).
Save Generation Dependencies	Instructs PowerDesigner to retain links between each source object and the corresponding target object, which allow objects to be subsequently identified, even if they have been modified (see <i>The Generation Links Viewer</i> on page 450).
Generate Mappings	Defines the source model as the data source of the generated model and creates mappings between all source and target objects (see <i>Chapter 16, Object Mappings</i> on page 473). This option is dependent on the <b>Save Generation Dependencies</b> option.
Rebuild Triggers	[CDM/OOM-PDM] Instructs PowerDesigner to rebuild triggers with unmodified templates after the PDM generation.

Option	Description
Convert Names into Codes	<p>Instructs PowerDesigner to generate target model object codes using a conversion script. This option can be useful when generating models with very different naming conventions. If it is not selected, target object codes are generated from source object codes.</p> <p>For example, generate an OOM Java class attribute with a code of <code>customerName</code> to a PDM table column called <code>CUSTOMER_NAME</code> by clicking the <b>Configure Model Options</b> button on the <b>General</b> tab, selecting the appropriate conversion script (see <i>Name and Code Conversion Scripts</i> on page 146), and selecting this option.</p>
Preserve n-n relationships	[CDM-LDM only] Specifies that many-to-many relationships created in the CDM will be generated to the LDM if the destination model permits them.
Enable transformations	Displays the <b>Extensions</b> tab, the <b>Pre-generation</b> tab (if your model has transformations defined) and the <b>Post-generation</b> tab (if you are updating an existing model that has transformations defined) to select transformations to perform before and/or after generation (see <i>Applying Pre- and Post- Generation Transformations</i> on page 442).
Skip single root element	[XSM-PDM only] Specifies that the single root element is ignored, and its immediate child elements are treated as multiple roots, which will be generated as tables.
Generate root element	[PDM/OOM-XSM only] Specifies that a single root element representing the PDM or OOM model is generated. Deselecting this option means that all the tables or classes are generated as multiple roots.
Generate tables/classes as	<p>[PDM/OOM-XSM only] Specifies how PDM tables or OOM classes are generated. You can choose between:</p> <ul style="list-style-type: none"> <li>• Elements - [default] each table/class is generated as an untyped element directly linked to its columns/attributes generated as attributes or sub-elements.</li> <li>• Elements with complex types - each table/class is generated as an element typed by a complex type, generated in parallel, to contain the columns/attributes.</li> </ul> <p>You can override this option for individual tables or classes (see <i>Customizing XSM Generation for Individual Objects</i> on page 445).</p>

Option	Description
Generate columns/attributes as	<p>[PDM/OOM-XSM only] Specifies how PDM columns or OOM attributes are generated. You can choose between:</p> <ul style="list-style-type: none"> <li>• Elements - [default] each column/attribute is generated as a sub-element of its table/class element or complex type.</li> <li>• Attributes - each column/attribute is generated as an attribute of its table/class element or complex type.</li> </ul> <p>You can override this option for individual columns or attributes (see <i>Customizing XSM Generation for Individual Objects</i> on page 445).</p>
Class Prefix	[OOM only] Specifies a prefix to apply to the codes for all classes generated.

### *PDM Generation Options*

The following additional options are available when generating a PDM:

Option	Description
Table: Table Prefix	Specifies a prefix for the names of generated tables.
Table: ID column type	<p>[XSM-PDM only] Specifies the type to use for ID columns, and which will be used to generate <code>xs:ID</code> types.</p> <p>Default: <code>numeric</code></p>
Index: PK index names	<p>Specifies the naming convention for primary keys. You can use the following variables in this and the Key index fields:</p> <ul style="list-style-type: none"> <li>• <code>%TABLE%</code> - Generated code of the table. This is the table code that is generated in the database. It may or may not be truncated if the code contains characters not supported by the DBMS</li> <li>• <code>%TNAME%</code>, <code>%TCODE%</code> - Table name and code</li> <li>• <code>%TLABL%</code> - Table comment</li> </ul> <p>Default: <code>%TABLE%_PK</code></p>

Option	Description
Index: AK index names	<p>Specifies the naming convention for alternate keys. You can use the following variables in this field:</p> <ul style="list-style-type: none"> <li>• %REFR% - Generated code of the reference</li> <li>• %REFNAME%, %REFRCODE% - Reference name and code</li> <li>• %PARENT% - Generated code of the parent table</li> <li>• %PNAME%, %PCODE% - Parent table name and code</li> <li>• %CHILD% - Generated code of the child</li> <li>• %CNAME%, %CCODE% - Child table name and code</li> <li>• %PQUALIFIER% - Parent table qualifier</li> <li>• %CQUALIFIER% - Child table qualifier</li> </ul> <p>The generated code of a variable is the code defined in the object property sheet, which may be truncated when generated if the code contains characters not supported by the DBMS</p> <p>Default: %TABLE%_AK</p>
Index: FK index names	Specifies the naming convention for foreign keys, by default %REFR%_FK
Index: FK threshold	Specifies the minimum number of estimated occurrences of an entity necessary to create an index on a foreign key. The estimated number of occurrences can be specified in the entity property sheet. If this property is not set, foreign key indexes are generated by default.
Reference: Update Rule	Specifies the default update constraint for referential integrity.
Reference: Delete Rule	Specifies the default delete constraint for referential integrity.



Option	Description
Reference: FK column name template	<p>Specifies the naming convention for migrated foreign keys. You can select one of the default templates from the list or enter your own using the following variables:</p> <ul style="list-style-type: none"> <li>• %REFR% - Name / Code of the reference</li> <li>• %PARENT% - Name / Code of the parent table</li> <li>• %COLUMN% - Name / Code of the parent column</li> <li>• %KEY% or %CONSTNAME% - Name / Code of the key constraint attached to the reference</li> <li>• %PROLE% - Role of the entity that generated the parent table, this variable proceeds from the conceptual environment. If no role is defined on the relationship or association, %PROLE% takes the content of %PARENT% to avoid generating a column with no name</li> </ul> <p>The following example checks the %PROLE% value; if it is equal to the parent name (which is the replacement value) then the template "%3:PARENT%_%COLUMN%" will be used, otherwise template "%PROLE%" will be used because the user has entered a parent role for the relationship:</p> <pre>[ %PROLE%=%PARENT%?%.3:PARENT%_%COLUMN%:%PROLE% ]</pre> <p>Customized naming templates reappear in the generation dialog box the next time you open it, but are not saved to the list of predefined templates.</p> <p>For more information about PowerDesigner variables, see <i>Customizing and Extending PowerDesigner &gt; DBMS Definition Files</i>.</p>
Reference: Use template	<p>Controls when the FK column name template will be used. You can choose between the following radio buttons:</p> <ul style="list-style-type: none"> <li>• Always use template</li> <li>• Only use template in case of conflict</li> </ul>

**Note:** If you modify a primary key in a PDM, then regenerate the PDM from a CDM, the modified primary key is not preserved. If you want to preserve a modified primary key, you need to modify the identifier in the CDM before regeneration.

When you reverse engineer a database into a PDM and then generate an OOM, you can add an appropriate package hierarchy in the OOM by right-clicking the OOM in the Browser, selecting **Add Package Hierarchy**, and entering an appropriate hierarchy (for example, `com.mycompany.myproduct.oom`).

### Target Models Tab

This tab contains a list of target models referenced by shortcuts or replications in the current model, and the appropriate generated models that the generated model will reference (see *Generating Shortcuts and Replicas* on page 470). If any target model does not have a

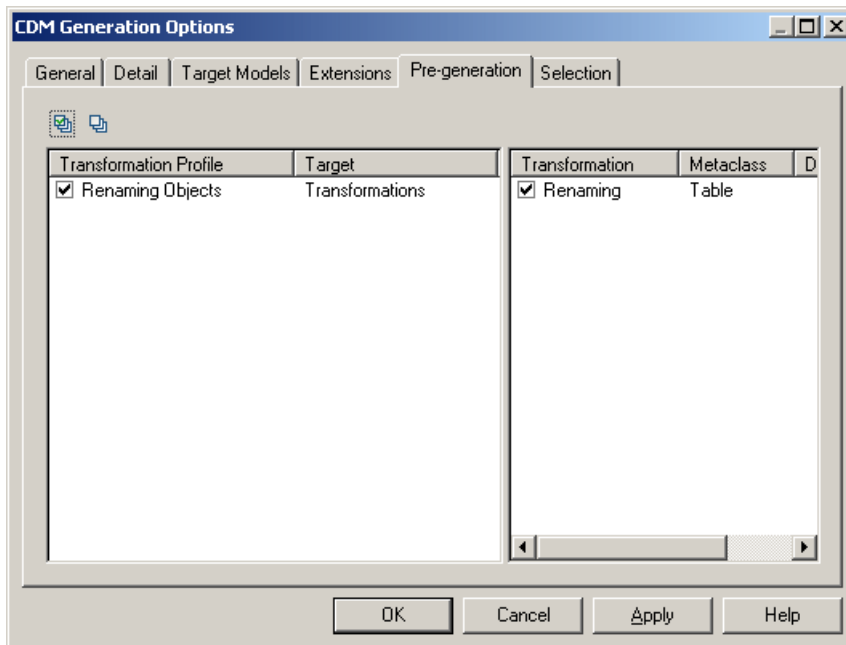
generated model listed, the generation of shortcuts or replications referencing it will fail. This tab will be empty if your model does not contain shortcuts to other models or if these shortcuts are set to generate as independent objects.

## **Applying Pre- and Post- Generation Transformations**

Click the **Enable transformations** button on the Model Generation Options **Detail** tab to display additional tabs for selecting transformations to apply to the source model objects before generation and to apply to generated objects after generation.

In order to apply transformations, you must have either defined transformation profiles in your model's language definition file (for PDM, OOM, BPM, or XSM) or in an extension file (see *Customizing and Extending PowerDesigner > Extension Files > Transformations (Profile)*).

1. Select **Tools > Generate Model** to open the Model Generation Options dialog.
2. Click the **Enable transformations** button on the **Detail** tab to display the **Extensions** tab, the **Pre-generation** tab (if your model has transformations defined) and the **Post-generation** tab (if you are updating an existing model that has transformations defined).
3. Click the **Extensions** tab to select extensions containing transformations.
4. Click the **Pre-generation** tab and select the profiles and transformations to be applied before generation. If you deselect a profile, none of its transformations will be executed. You can drag and drop profiles to modify the order of execution of transformations.



5. Click the **Post-generation** tab and select the profiles and transformations to be applied after generation.

6. Click **OK** to begin the generation. The following steps are performed:
  - a. The object tree of the source model is traversed from the model object down and, for each type of object for which one or more pre-generation transformation profiles is defined, each profile is applied in the order in which they appear on the tab, with each transformation being applied in the order in which they are defined in the profile.
  - b. The transformed source model is generated to the target model.
  - c. The object tree of the generated target model is traversed and type of object and, for each type of object for which one or more post-generation transformation profiles is defined, each profile is applied in the order in which they appear on the tab, with each transformation being applied in the order in which they are defined in the profile.

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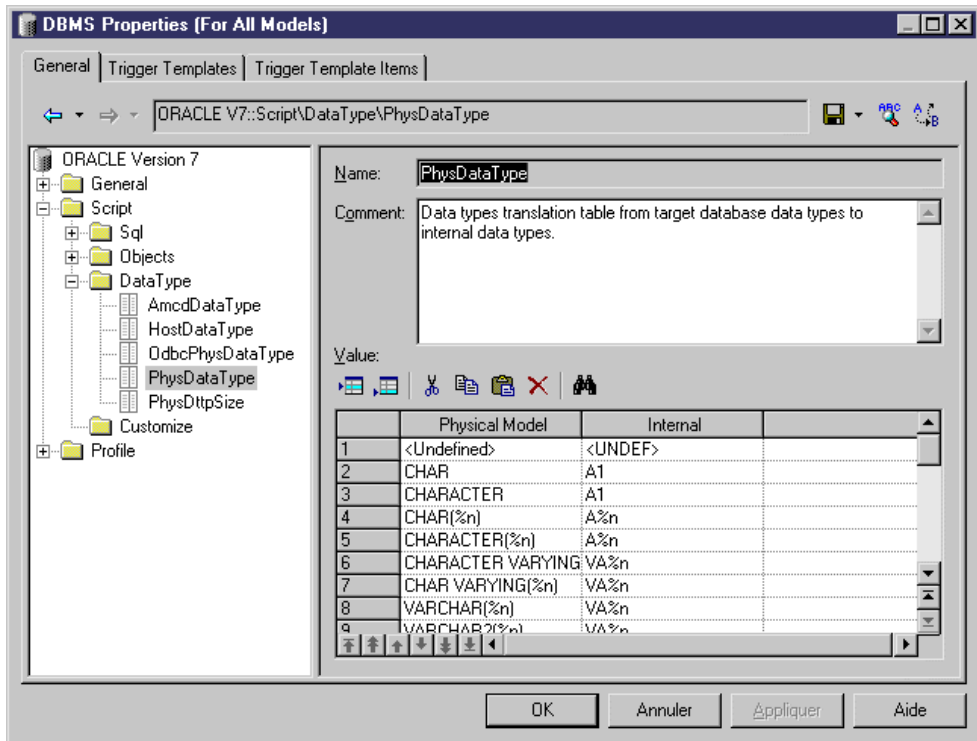
**Note:** You can apply post-generation transformation profiles to your model at any time by selecting **Tools > Apply Transformations** (see *Applying Transformations to Objects* on page 167).

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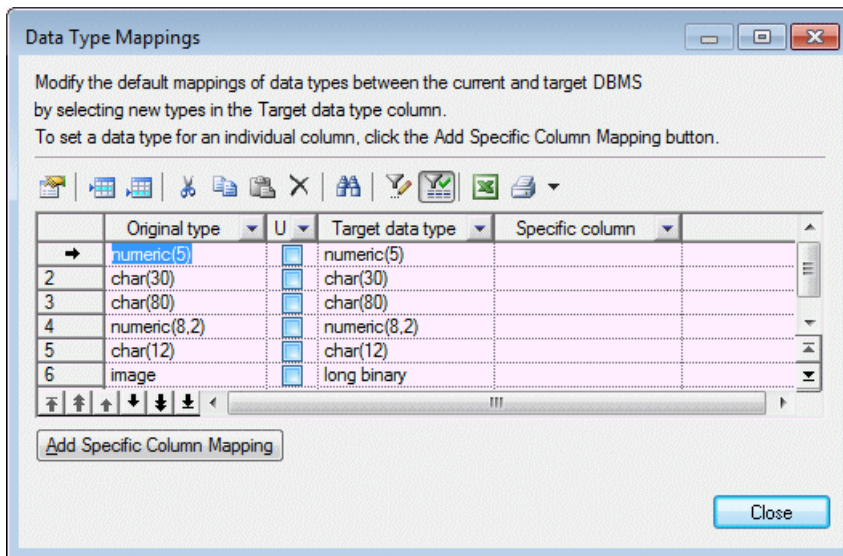
## **Customizing Data Type Mappings**

When generating another PDM from your PDM, PowerDesigner maps the existing column datatypes to appropriate data types in the new model. If the standard mappings are not sufficient for you, you can use the *Enhance Data Type Mapping* extension to specify alternative mappings, including on a column-by-column basis.

To review the conversions that PowerDesigner makes by default between the data types of a database or other modeling target and its standard conceptual types (which are also used in the CDM), select **Tools > Resources > Type**, select the appropriate file in the list and click the **Properties** tool. Expand the **Script > DataType** (for DBMSs) or **Settings > DataType** (for other resource files), and review each of the entries (which are described in their **Comment** field):



1. Select **Tools > Generate Physical Data Model**, enter the appropriate generation options (see *Core Features Guide > Linking and Synchronizing Models > Generating Models and Model Objects*).
2. On the **Detail** tab, click the **Enable Transformations** button to display the **Extensions** tab, and select the **Enhance Data Type Mapping** extension.
3. Click **OK** to start the generation. The Data Type Mappings dialog appears, with the existing data types present in the model listed in the **Original type** column, and those that PowerDesigner proposes in the new DBMS in the **Target data type** column:



4. You can change data type mappings in two ways:
  - To change the mapping for all columns of a certain data type, select the desired new data type from the list in the **Target data type** column.
  - To change the mapping for one column only, click the **Add Specific Column Mapping** button, select the column from the tree, click **OK**, choose the new data type for the column, and click **OK** to add this mapping to the list.
5. When you have modified all the necessary data types, click **Close** and the generation will continue, using your custom mappings where appropriate.

---

**Note:** You can also customize data type mappings when changing the DBMS of your model with the **Database > Change Current DBMS** command. To do so, you must first attach the Enhance Data Type Mapping extension, by selecting **Model > Extensions**, clicking the **Attach an Extension** tool, select the extension, and clicking **OK** to attach it to your model.

---

For more information about data types, see *Customizing and Extending PowerDesigner > DBMS Definition Files > Script/Data Type Category* and *Customizing and Extending PowerDesigner > Object, Process, and XML Language Definition Files > Settings Category: Object Language*.

## Customizing XSM Generation for Individual Objects

When generating an XSM from a PDM or OOM, you can specify global generation options to generate tables/classes as elements with or without complex types and columns/attributes as elements or attributes. You can override these options for individual objects by attaching the PDM XML Generation or OOM XML Generation extension to your source model and selecting from their XML generation options.

---

**Note:** The extension provides new property sheet tabs for setting generation options for individual objects, but you can also set these options with or without the extension by selecting **Model > objects** to open the appropriate object list, clicking the **Customize Columns and Filter** tool, and selecting to display the `XML Generation Mode` column.

---

For example, if you want to generate the majority of your table columns to an XSM as XML attributes, but want to generate certain columns as elements, you should:

- Modify the XML generation options for those columns that you want to generate as elements.
  - Select to generate columns as attributes on the Model Generation Options **Detail** tab.
1. Select **Model > Extensions** to open the List of Extensions, and click the **Attach an Extension** tool.
  2. On the **General Purpose** tab, select `PDM XML Generation` or `OOM XML Generation` and click **OK** to attach the extension to your model and **OK** to close the List of Extensions.  
 These extension files enable the display of the **XML** tab in all table and column or class and attribute property sheets.
  3. Open the property sheet of the table, column, class, or attribute whose generation you want to customize, and click the **XML** tab.
  4. Use the radio buttons to specify how you want to generate the object in an XSM.
    - For tables and classes, you can specify to generate them as:
      - Elements - the table/class is generated as an untyped element directly linked to its columns/attributes generated as attributes or sub-elements.
      - Elements with complex types - the table/class is generated as an element typed by a complex type, generated in parallel, to contain the columns/attributes.
      - Default - generation of the table/class is controlled by the option selected in the **XML Generation** group box on the Model Generation Options **Detail** tab.
    - For tables, you can additionally specify to generate keys as:
      - Key - [default] The primary key columns are generated and also `KEY` and `KEYREF` wherever the table is referenced.
      - ID attribute - The primary key columns are not generated and an ID attribute, `id`, is generated to replace them.  
 Wherever the table is referenced, an `IDREF` attribute is generated to reference the appropriate element. If the reference role name is assigned, this attribute is given this name. Otherwise, the referenced table name is used and the standard renaming mechanism is enforced.
      - Key and ID attribute - In many cases the primary key columns have significant data and you may want to generate them, as well as an ID attribute.

In this case an ID attribute is generated for the element and IDREF is used systematically for any reference to the table:

The following rules apply to the generation of keys:

- If a Table generates an ID, all its child tables will generate an ID attribute.
  - If a Table generates Key columns, all its child tables will generate Key columns.
  - If a child table is flagged to generate PK only, ID Attribute will be automatically generated.
  - If a table generates ID attribute, No Key nor KeyRef will be generated, and ALL references will generate IDREF attribute.. (Even if the table generates also Key Columns)
  - If a table generates ID attribute ONLY, All Foreign Key Columns referencing its Key columns will be systematically removed and replaced by an IDREF attribute
  - For columns and attributes, you can specify to generate them as:
    - Elements - [default] the column/attribute is generated as a sub-element of its table/class element or complex type.
    - Attributes - the column/attribute is generated as an attribute of its table/class element or complex type.
    - Default - generation of the column/attribute is controlled by the option selected in the **XML Generation** group box on the Model Generation Options **Detail** tab.
5. Modify the XML generation options for any other objects that you want to generate in a different manner.
  6. Select **Tools > Generate XML Model**, ensure that the appropriate options are set in the **XML Generation** group box on the Model Generation Options **Detail** tab, and start your generation.

## Generating Model Objects

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You can define your own model-to-model object generation commands. You can define as many commands as you need, and generate any of your model's objects as any kinds of objects in any other model. The generated objects are linked to the original objects and can be resynchronized at any time.

Before you can generate model objects, you must define the details of the generation (see *Defining Simple Object Generations* on page 448)

---

**Note:** This procedure deals with generating one or more object types to another model. For information about generating your entire model to another model, see *Generating Models* on page 435).

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1. Select **Tools > Generate Objects > Menu command name** to open the Object Generation Options window for the generation that you have previously defined (see *Defining Simple*

*Object Generations* on page 448 or *Defining Advanced Object Generations* on page 449).

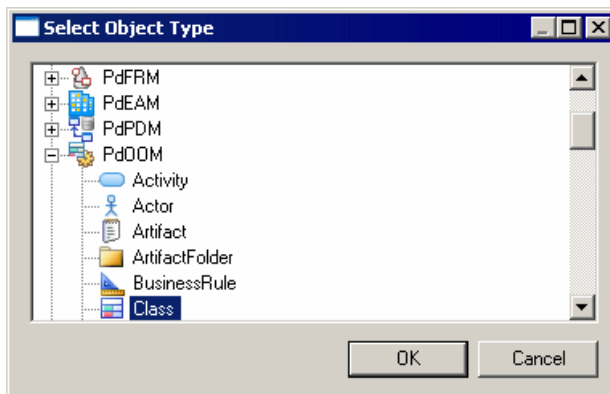
2. On the **General** tab, select a radio button to generate a new or update an existing model, and complete the appropriate options (see *Model Generation Options* on page 436).
3. [optional] Click the **Detail** tab and set any appropriate options.
4. [optional] Click the **Target Models** tab and specify the target models for any generated shortcuts.
5. [optional] Click the **Selection** tab and select or deselect objects to generate (see *Adding an Item from a Selection List* on page 118).
6. Click **OK** to begin generation.

### Defining Simple Object Generations

Simple object generations allow you to generate a single type of object (eg, Tables or Classes) to any other type of object. You can define multiple object generations. They are stored as objects in your model and are accessed by selecting **Tools > Generate Objects > Generation Name**.

To generate more than a single type of object or to have greater control over how individual properties will be generated, use an advanced object generation (see *Defining Advanced Object Generations* on page 449).

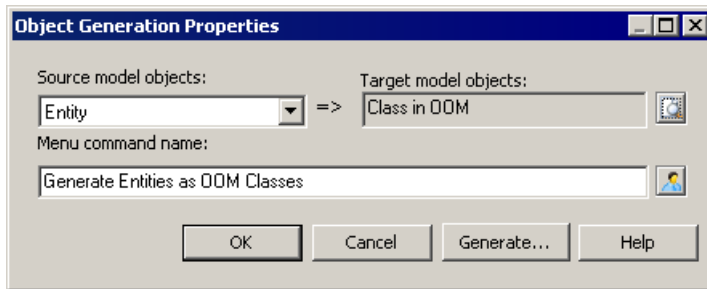
1. Select **Tools > Generate Objects > Define New Object Generation** to open the Object Generation Properties dialog.
2. Select the type of model object you want to generate other model objects from in the **Source model objects** list.
3. Click the **Choose Metaclass** tool to the right of the **Target model objects** field to open the Select Object Type dialog, which allows you to select the type of objects you want to generate.





You can choose any object (including extensions) from any PowerDesigner model type, but some choices will be more appropriate than others.

4. [optional] Edit the **Menu command name** that PowerDesigner suggests, and which will appear under the **Tools > Generate Objects** menu to allow you to launch the generation.



5. Click **Generate** to launch the generation immediately or **OK** to save the generation definition for use later.

Once you have defined an object generation, you can launch it at any time by selecting **Tools > Generate Objects > Menu command name**.

## Defining Advanced Object Generations

Advanced object generations allow you to generate one or more types of object to any other types of object, with complete control over how all the attributes, compositions (sub-objects), and aggregations (related objects) will be mapped to the generated objects' properties. The generation mappings are defined in an extension file, can be shared with all users through the repository library, and are accessed by selecting **Tools > Generate Objects > Generation Name**.

---

**Note:** The following procedure gives an overview of the process for defining an advanced object generation. If an administrator has already defined a generation and provided the extension file to you, you can perform the generation directly by selecting **Tools > Generate Objects > Generation Name**. You can also define simple object generations for a single type of object directly in your model (see *Defining Simple Object Generations* on page 448).

---

1. Select **Tools > Resources > Extensions > Model Type** to open the appropriate extension file list.

---

**Note:** As object generations are defined on the source objects, you must choose the correct type of extension file. For example, if you are generating EAM organization units and processes to a BPM, you should create the generation definition in an enterprise architecture model extension file.

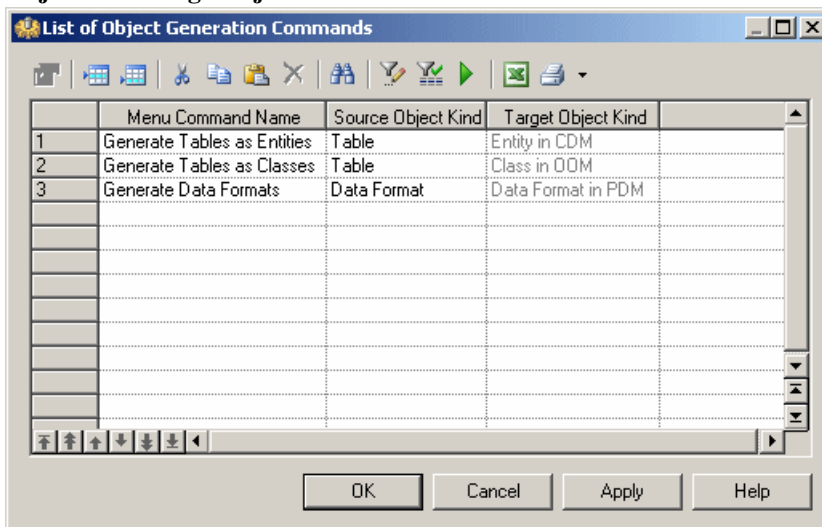
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2. Create a new extension file in the list to contain your object generation definition (see *Creating an Extension File* on page 276).

3. Create an object generation definition in the extension file (see *Customizing and Extending PowerDesigner > Extension Files > Object Generations (Profile)*).
4. Save the extension file, attach it to a test model, and test the generation by selecting **Tools > Generate Objects > Generation Name**.
5. [optional] Check the extension file into the repository library to have it automatically deployed to all users (see *Sharing Resource Files via the Library* on page 551).

## Managing Object Generation Commands

You can review the object generations that you have defined by selecting **Tools > Generate Objects > Manage Object Generations**.



To review the definition of a generation, select it and click the **Properties** tool; to launch it, select it and click the **Run Object Generation** tool.

**Note:** You can also create object generations directly in this list by clicking the **Add a Row** tool and specifying a menu command name and source and target object kinds.

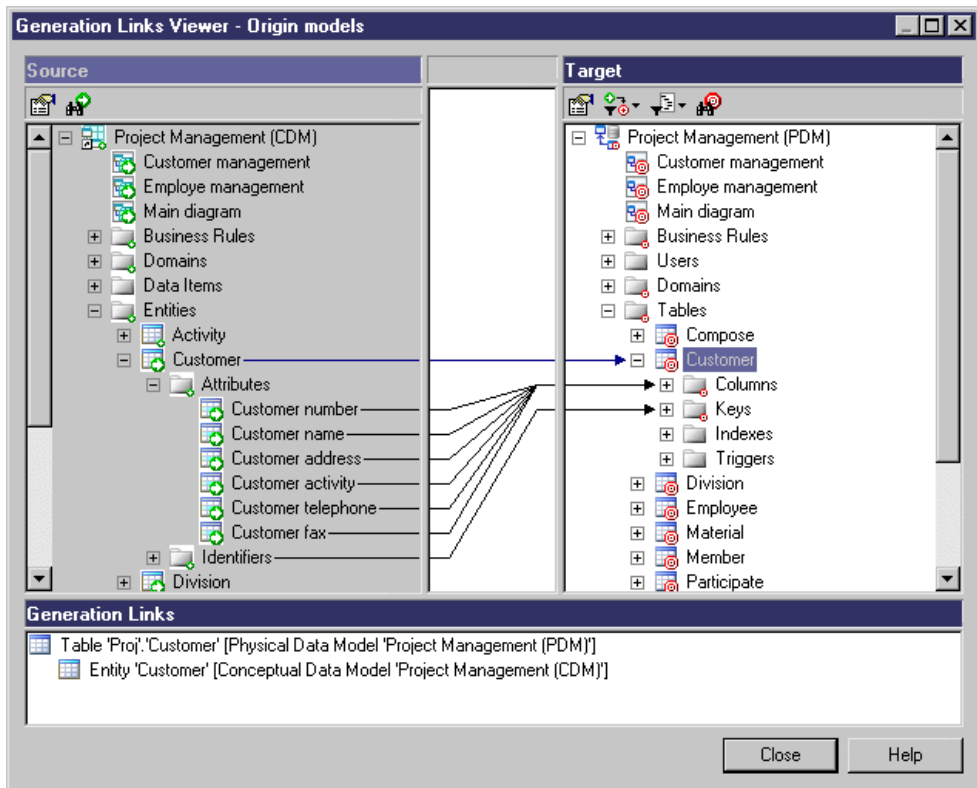
## The Generation Links Viewer

The Generation Links Viewer allows you to view (but not edit) the generation links of a given model, which allow you to identify the origin of each generated or derived object of the model.

**Note:** Links are created between models during model generation only if the *Save Generation Dependencies* option on the Detail tab of the generation dialog box is selected.

You can choose to view the:

- Links to the model(s) derived from the present model, by selecting **Tools > Generation Links > Derived Models** - the current model is shown in the Source pane and the derived models in the Target pane.
- Links to the model(s) from which the present model was derived, by selecting **Tools > Generation Links > Origin Model** - the current model is shown in the Target pane and the origin models in the Source pane.



The Generation Links Viewer dialog box is divided in three parts:






- The Source pane - which is on the left-hand side, and displays the structure of the source model
- The Target pane - which is on the right-hand side, and displays the structure of the target model(s)
- The Generation Links pane – shows you the sources or the targets of the selected object in the current model as a tree view. The root object is the source or target object from the current model, and the generation link name is composed of the object type and name (followed by, for link objects, the names of its extremities) followed by its parent model. You can double click a generation link in this pane to view the properties of the source or target object.

## CHAPTER 14: Generating Models and Model Objects

Source object icons have a small green arrow symbol and target object icons have a small red target symbol on their bottom right-hand corners.

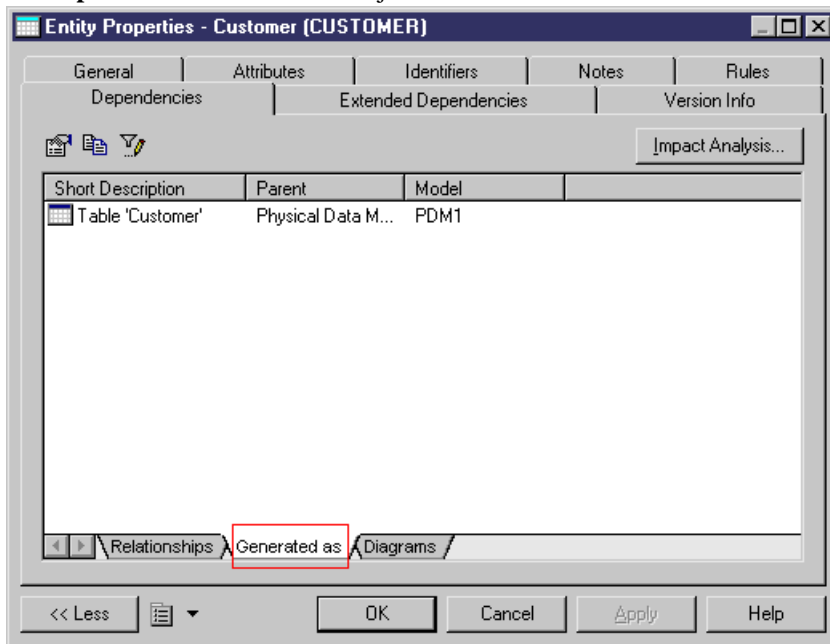
Non-editable links are drawn from the origin object in the Source pane to the derived object in the Target pane. Double-click the link in either pane to open the appropriate object's property sheet, or in the area between the two panes to display its details in the Generation Links pane.

The following tools are available in the Generation Links Viewer:

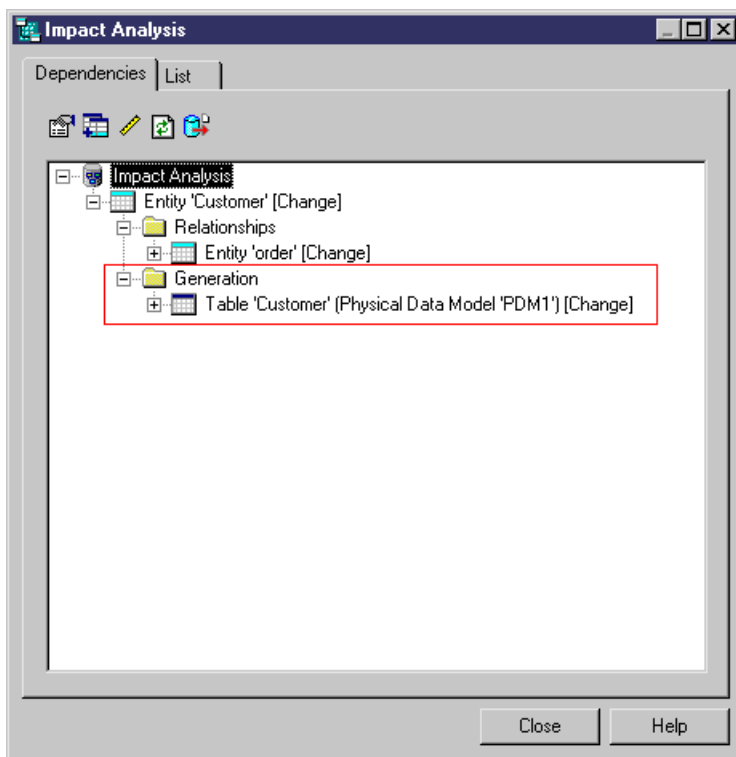
Tool	Description
	Properties - Opens the property sheet of the selected source or target object.
	Find Source Object - Finds an object in the Source pane and highlights it.
	Find Target Object - Finds an object in the Target pane and highlights it.
	Filter Generation Links – You can choose to filter by: <ul style="list-style-type: none"><li>• All generation links</li><li>• Only generation links of the selected object</li><li>• Only generation links of the selected object and its child objects</li></ul>
	Filter Objects - You can choose to filter by: <ul style="list-style-type: none"><li>• All objects</li><li>• Only objects with generation links</li><li>• Only objects without generation links</li></ul>

## Using Impact Analysis with Generated Models

To use impact analysis on generated models, consolidate them in the Repository and extract them with the **Extract Dependencies** option selected to display the **Generated As** subtab in the **Dependencies** tab of source objects.



In the Impact Analysis dialog box, this link does not appear by default, you have to click the *Extract Dependencies* tool to display the generation links:



## CHAPTER 15      **Shortcuts and Replicas**

Shortcuts and object replications allow you to reuse objects defined in one model or package elsewhere. You should use a shortcut when you want to reference an object in another model or package, and a replica when you want to create a local copy of the object and make changes to one or more of its properties.

---

**Note:** You cannot transform a shortcut into a replica, or vice versa. When choosing to create a shortcut or replica, you should identify how you want to use it. For example, if you want to reuse an existing table in your PDM, you should create a:

- **Shortcut** - If you do not require the table to belong to your domain or namespace, and you just want to reference it without modifying its structure (adding, removing or otherwise changing columns or other sub-objects).
- **Replica** - If you need a synchronized copy of the table in your namespace, or you want to modify its structure.
- **Graphical synonym** - If you merely want additional instances of the object symbol in your diagram to improve its readability and simplify linking (see *Creating Graphical Synonyms for Object Symbols* on page 199).

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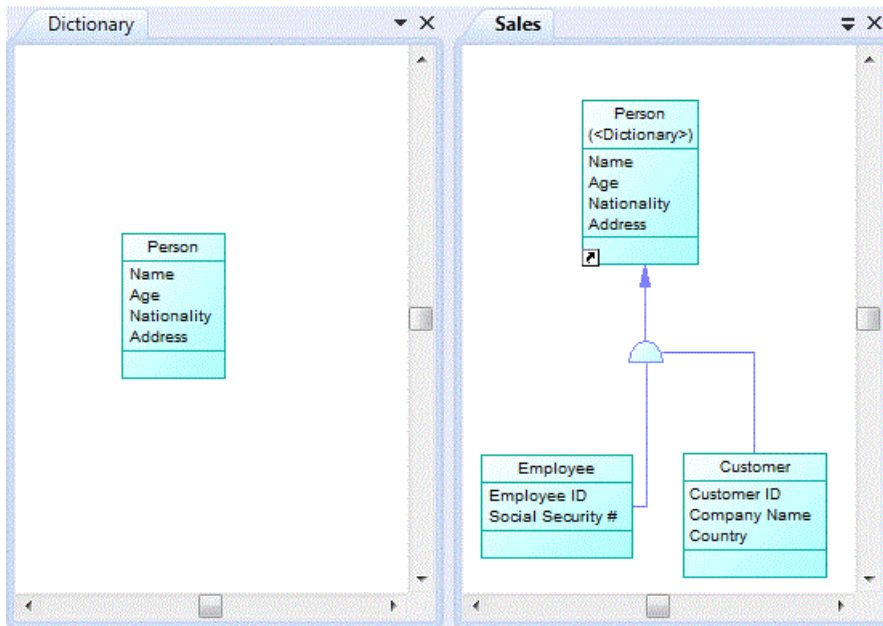
A shortcut or replica is:

- **Internal** – if it points to an object in a different package in the same model.
- **External** – if it points to an object in a different model.

Shortcuts and replications allow you to benefit from:

- **Reusability** - You can create libraries of reusable objects whose properties are inherited by multiple objects in different models. For example, the `Person` entity and its four attributes (`Name`, `Age`, `Nationality` and `Address`) can be used via inheritance links in any model where you have need of a customer, employee, etc.

In the following example, a `Person` entity is created in the Dictionary CDM, and a shortcut to it is created in the Sales CDM, where the `Employee` and `Customer` entities inherit from it:



- *Automatic updates*- When the target object changes, the updates cascade automatically (if both the referencing and target models are open in the workspace) to all the shortcuts and replicas.

You can create shortcuts or replicas for most PowerDesigner objects (including composite objects and other shortcuts or replicas). When you replicate an object, its sub-objects are also replicated. You cannot create shortcuts or replicas for the following types of objects:

Module	No Shortcuts For...	No Replicas For...
All	Diagrams, Links	Diagrams, Links, Packages
RQM	Traceability link, user allocation	-
EAM	-	-
BPM	Decisions, synchronizations	Starts, ends, synchronizations
CDM/LDM	Associations, Inheritances	Associations, Inheritances
PDM	Privileges	Privileges
DMM	-	Replications not supported
OOM	Decisions, synchronizations, interaction fragments, interaction references, messages	Starts, ends, synchronizations, interaction fragments, interaction references, messages



Module	No Shortcuts For...	No Replicas For...
XSM	Internal shortcuts not supported for any object. External shortcuts not supported for imports, includes, redefines, annotations	-

---

**Note:** You cannot create internal shortcuts or replicas to *global objects*, such as organization units, or business rules, because they belong to the model and cannot be displaced into a sub-package. You can reuse data item shortcuts only if they are internal (same namespace). A duplicated data item shortcut has the same characteristics as the original data item shortcut.

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## Creating Shortcuts

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You can create shortcuts to target objects from another package in the current model, or from another model open in the workspace through copy and paste, drag and drop, or from the List of Shortcuts.

- **Drag and Drop** - Right-click on the target object in the Browser (or its symbol in a diagram) and drag and drop it into the diagram where you want to create the shortcut (or onto a model or package in the Browser). Release the right mouse button, and select **Create Shortcut(s) Here**.

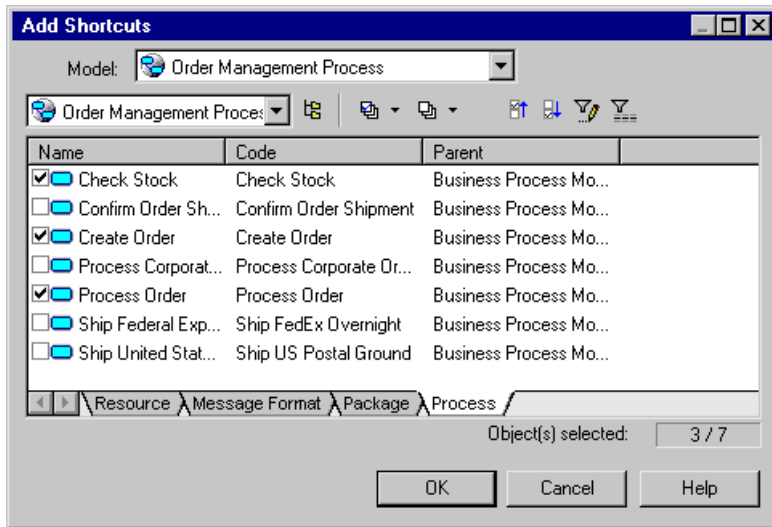
You can also create shortcuts of objects by left-clicking and dragging and dropping them while holding down **Shift+Ctrl**.

For more information about dragging and dropping objects, including how to change the default behavior, see *Dragging and Dropping Objects* on page 122.

- **Copy and Paste** - Select the target object in the Browser (or its symbol in a diagram) and press **Ctrl+C** (or select **Edit > Copy**), then right-click in the diagram where you want to create the shortcut (or on a model or package in the Browser), and select **Edit > Paste as Shortcut**.

For more information about copying and pasting objects, including how conflicts are managed, see *Copying and Pasting Objects* on page 123.

- **List of Shortcuts** - Select **Model > Shortcuts** to open the List of Shortcuts and click the Add Shortcuts tool:

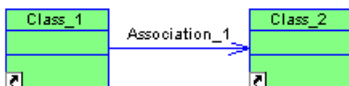


Select the target model and package in the upper part of the dialog and objects in the sub-tabs in the lower part of the dialog, and then click **OK** to add them as shortcuts to the current model.

For more information about the tools in this dialog, see *Adding an Item from a Selection List* on page 118.

If you select two linked objects in a model and create shortcuts from them, a shortcut of the link between them will also be created. If, after having created shortcuts from two objects, you subsequently create a link between them in the target model, you can update the referencing diagram to display the new link by opening it and selecting **Tools > Complete Links**.

Link shortcuts do not display the shortcut overlay symbol. In the following example, both classes and the association are shortcuts, but only the classes display the shortcut overlay:

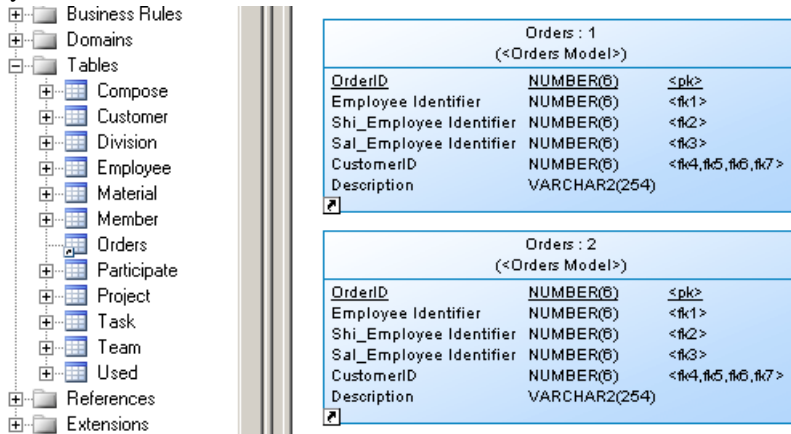


The following rules restrict the use of shortcuts:

- You cannot create more than one shortcut to the same target object in the same model or package.
- You cannot create a shortcut for a CDM data item outside the current namespace.
- You cannot create links between two shortcuts if the link implies a parent/child hierarchy (for example, you cannot create a reference link between two table shortcuts in a PDM).
- You cannot create a link between an entity and the shortcut of an inheritance.

When you create a shortcut in a diagram, the following rules apply. If the model or package where you create the shortcut:

- Does not contain the shortcut - a shortcut and symbol are created
- Already contains the shortcut, but there is no symbol in the diagram - a symbol is created
- Already contains the shortcut, and there is a symbol in the diagram - a shortcut synonym symbol is created:



For more information about synonyms, see *Creating Graphical Synonyms for Object Symbols* on page 199.

## Shortcut Properties

To open the property sheet of a shortcut and view or edit its properties, double-click its Browser entry or diagram symbol. The information that you will see depends on your settings for the **Internal Shortcut** and **External Shortcut** general options and the **External Shortcut Properties** model option

To view the target object property sheet in place of the shortcut, click **Tools > General Options > Dialog** and select **Target object** in **Internal Shortcut** and **External Shortcut**. To maximize the information on external shortcut property sheets and symbols, click **Tools > Model Options > Dialog** and select **All** in **External Shortcut Properties**.

**Note:** External shortcuts can display properties defined in the standard PowerDesigner metamodel and in extensions that are attached to the target model, but not any that are defined in extensions embedded in the target model. If you want to display such embedded extensions, you should export the extension file from the target model and then attach it as a shared extension.

The following properties are available on the **General** tab of a shortcut property sheet or on the **Shortcut** tab of a target object property sheet:

Property	Description
Target type	Specifies the type of the target model and the type of object which the shortcut references.

Property	Description
Name	<p>Specifies the name of the target object. Click the <b>Properties</b> tool to the right of this field to view or edit its properties.</p> <p>Click the <b>Change Target Object</b> at the bottom of the dialog to open a dialog to allow you to choose a different target object (which must be of the same type, and cannot already be referenced by another shortcut in the same package).</p>
Code	Specifies the code of the target object.
Target model	Specifies the name of the model to which the target object belongs. Click the <b>Properties</b> tool to the right of this field to view or edit its properties.
Target package	Specifies the name of the model package to which the target object belongs. Click the <b>Properties</b> tool to the right of this field to view or edit its properties.
Shortcut type	Specifies whether the shortcut is external (from another model) or internal (from another package in the present model).
Status	<p>Specifies the status of the target model, which may affect what information is available for external shortcuts if the target model is closed or not found.</p> <p>For external shortcuts, (and you have not selected to display all properties), only the name of the shortcut and target model are available. Otherwise, all properties can appear in accordance with the display preferences.</p>
Object1 and Object2	[link shortcut only] Specify the names of the source and target objects which the link connects
Generate	[external shortcut only] Specifies that the shortcut should be generated when generating another model from the referencing model (see <i>Chapter 14, Generating Models and Model Objects</i> on page 435).
Generated as	<p>[external shortcut only] Specifies how the shortcut will be generated (see <i>Generating Shortcuts and Replicas</i> on page 470). You can choose between:</p> <ul style="list-style-type: none"> <li>• <b>Shortcut</b> - the shortcut is generated as a shortcut and retains its link to its target object</li> <li>• <b>Object</b> – the shortcut is generated as an independent object and is no longer linked to its target object</li> </ul>

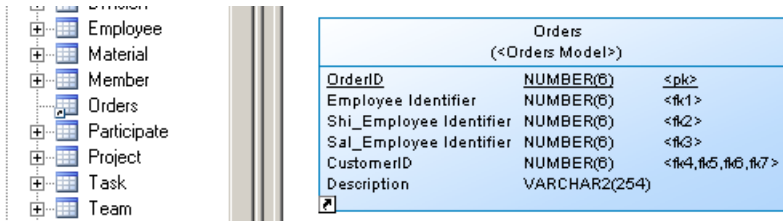
A shortcut property sheet also includes the following tabs:

- **Dependencies** - Lists the objects with connections to the shortcut (see *Viewing Shortcut and Replica Dependencies* on page 468)
- **Version Info** - Specifies the shortcut owner, modification and creation details

## Viewing Shortcuts

Shortcuts can be identified in the referencing model in the Browser and diagrams by the shortcut arrow overlay on their bottom left corners.

In the following example, the Orders table is a shortcut. It appears in the Browser with the other tables that belong to the model. Both the Browser entry and the diagram symbol display the shortcut arrow overlay:




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**Note:** To hide shortcuts in the Browser, deselect the **Show shortcuts** general option (see *General Options* on page 255).

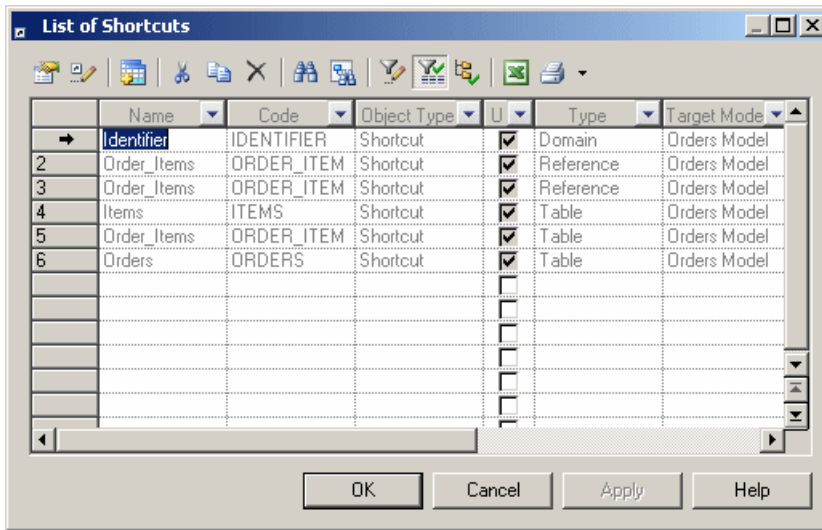
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For external shortcuts, if you have selected to display all properties (see *Shortcut Properties* on page 459) or if the target model is open in the workspace, the properties that appear on its symbol are controlled by the standard display preferences for that type of object.

Otherwise, only the name will appear, and you can modify the display preferences specific to shortcuts by clicking **Tools > Display Preferences**, and selecting the Shortcut category. The following preferences are available:

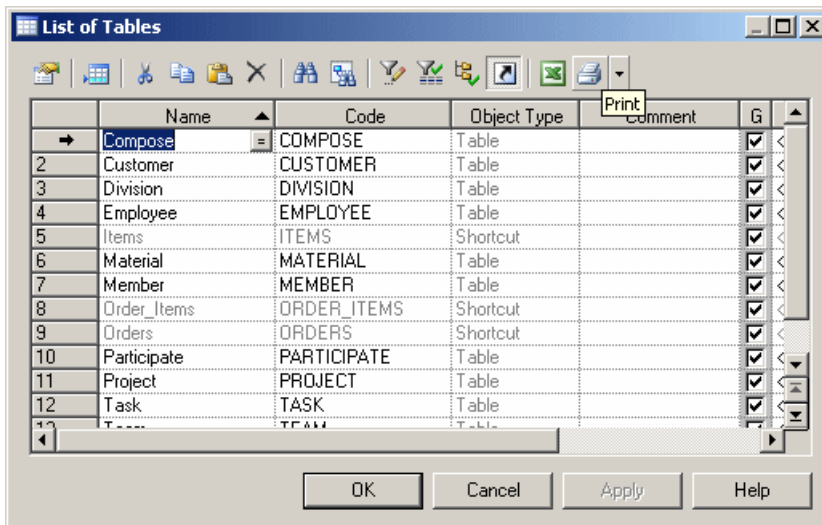
Preference	Description
Icon	Displays the shortcut icon on shortcut symbols
Model	[external shortcuts only] Displays the name of the target model on shortcut symbols
Package	Displays the package name on shortcut symbols. If you select this option, you must choose to display the: <ul style="list-style-type: none"> <li>• Full path – displays the full path to the package</li> <li>• Last package only – displays the last package name only</li> </ul>

To view all the shortcuts in a model, select **Model > Shortcuts** to open the List of Shortcuts. All the entries are greyed because you cannot modify a shortcut directly in this list:



The U[*sed*] column is checked when the shortcut has a symbol in a diagram or if it is referenced by at least one other object. If this column is not checked, the shortcut is not used in the model and you can safely delete it.

To view all the shortcuts for a particular type of object in a model, open the appropriate list by selecting **Model > Objects**, and click the **Include Shortcuts** tool:



For information about working with these lists, see *Object Lists* on page 108.

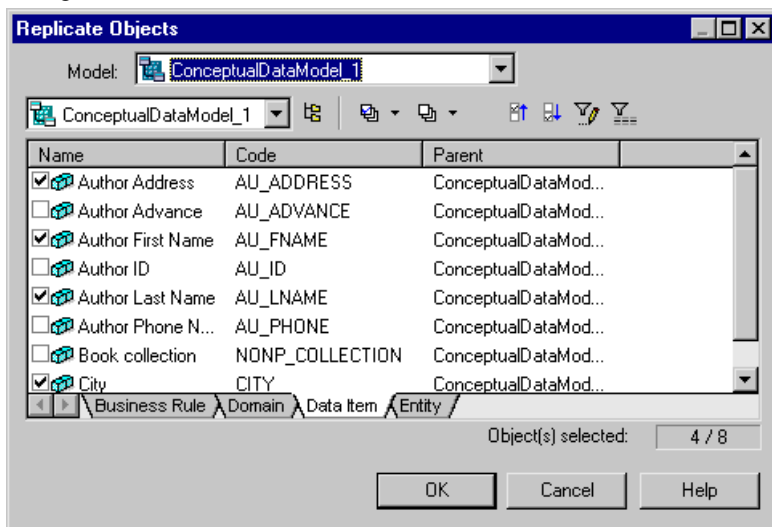
## Creating Replicas

You can create replicas to target objects from another package in the current model, or from another model open in the workspace through drag and drop, or from the Replicate Objects dialog.

- **Drag and Drop** - Right-click on the target object in the Browser (or its symbol in a diagram) and drag and drop it into the diagram where you want to create the replica (or onto a model or package in the Browser). Release the right mouse button, and select **Replicate Here**. You can also create replicas of objects by left-clicking and dragging and dropping them while holding down **Shift+Alt**.

For more information about dragging and dropping objects, including how to change the default behavior, see *Dragging and Dropping Objects* on page 122.

- **Replicate Objects dialog** - Select **Edit > Replicate Objects** to open the Replicate Objects dialog:



Select the target model and package in the upper part of the dialog and objects in the sub-tabs in the lower part of the dialog, and then click **OK** to add them as replicas to the current model.

For more information about the tools in this dialog, see *Adding an Item from a Selection List* on page 118.

Sub-objects (such as table columns or class attributes and operations) are automatically replicated when you replicate their parent object. You can replicate sub-objects individually through drag and drop only. You could, for example, create library models to group sub-objects that you regularly use, ready for replication.

Name uniqueness rules are respected when you replicate objects, so that replicas are renamed upon creation in the referencing model when objects with the same name already exist.

### **Desynchronizing Replica Properties**

By default, replicas have read-only property sheets appropriate to their object type. To desynchronize one or more properties and make them editable, select the **Version Info** tab, click the **Replication Properties** button to open the replication property sheet, select the **Attributes** or **Collections** tab, and deselect the properties that you want to override in the replica.

---

**Note:** To break the replica's link to its target and turn it into an independent object, click the **Delete Replication** button. To make multiple replicas into independent objects, select **Model > Replications** to open the List of Replications, and delete the relevant replications.

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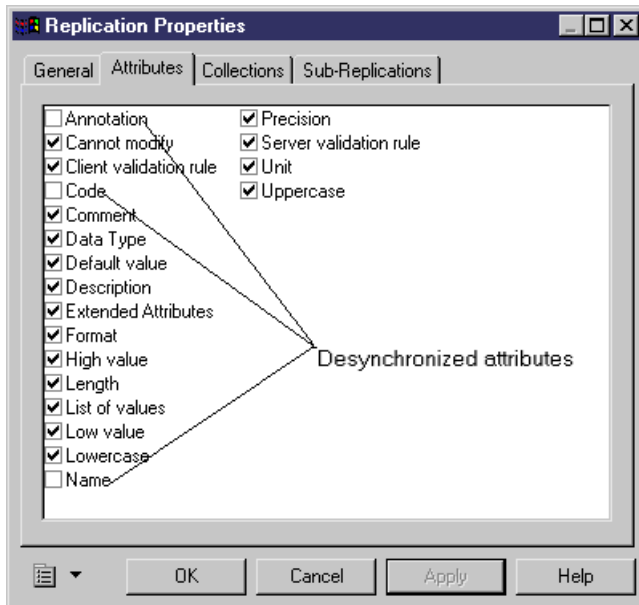
The **General** tab of the replication property sheet contains the following properties:

Property	Description
Original Object Model	Specifies the name of the model to which the target object belongs. Click the <b>Properties</b> tool to the right of this field to view or edit its properties.
Full Name	Specifies the full path to the target object. Click the <b>Properties</b> tool to the right of this field to view or edit its properties.
Type	Specifies the type of the target object.
Status	Specifies the status of the target model, which can be closed, open, or not found.
Replica Object Full Name	Specifies the full path to the replica object. Click the <b>Properties</b> tool to the right of this field to view or edit its properties.
Generate	Specifies to generate the replica along with standard models in a model-to-model generation (see <i>Generating Shortcuts and Replicas</i> on page 470).

A replication definition also includes the following tabs:

- **Attributes** - Lists the attributes of the replicated object. Deselect the check box of an attribute to make it editable for the replica.



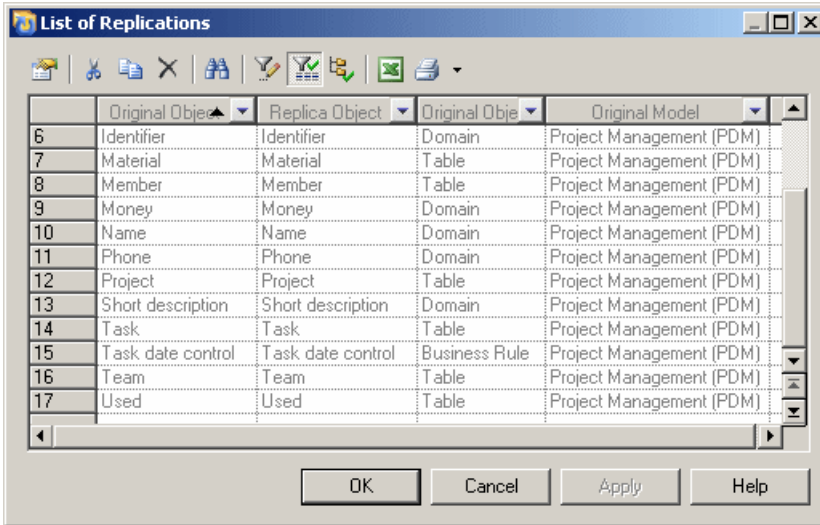


- Collections - Lists the collections of the replicated object. Deselect the check box of a collection to make it editable for the replica.
- Sub-Replications - Lists the sub-objects replicated as part of the object replication. Click the **Properties** tool to open the property sheet of the sub-replication in order to make editable one or more of its properties.

## Viewing Replicas

Replicas look identical to normal objects in the Browser and diagrams, but all or part of their property sheets are grayed out and uneditable. Replications, which maintain the link between

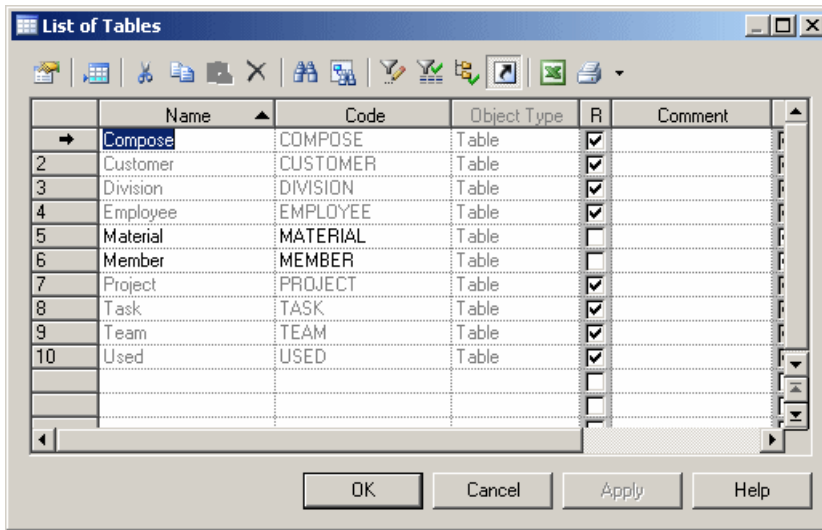
the replica and the original object, are not accessible from the Browser or diagrams, but can be viewed by selecting **Model > Replications** to open the List of Replications.



As each replica requires a replication, you can view all the replicas present in the model from this list. You cannot create replicas here (see *Creating Replicas* on page 463), but you can access the property sheets of replications and, from there, the property sheets of replicas and their target or original objects (see *Desynchronizing Replica Properties* on page 464).

If you delete a replication from the list, the associated replica will lose its link to the original object and become an independent object.

To view all the replicas for a particular type of object in a model, open the appropriate list by selecting **Model > Objects**, and look for checkmarks in the **R[eplica]** column:



If this column is not visible, click the **Customize Columns and Filter** tool, and select the Replica attribute to add it to the list.

Any property that is synchronized (and thus not editable) is grayed.

## Comparing and Merging Replicas

You can compare and merge the properties of a replica with those of the original object. When merging models, to merge a replica as a replica, you must merge the replica and its associated replication. If you merge only the replica and not the replication (which links it to the original object), the replica will be transformed into an independent object.

For more information about comparison and merging see *Chapter 7, Comparing and Merging Models* on page 223.

## Synchronizing Shortcuts and Replicas

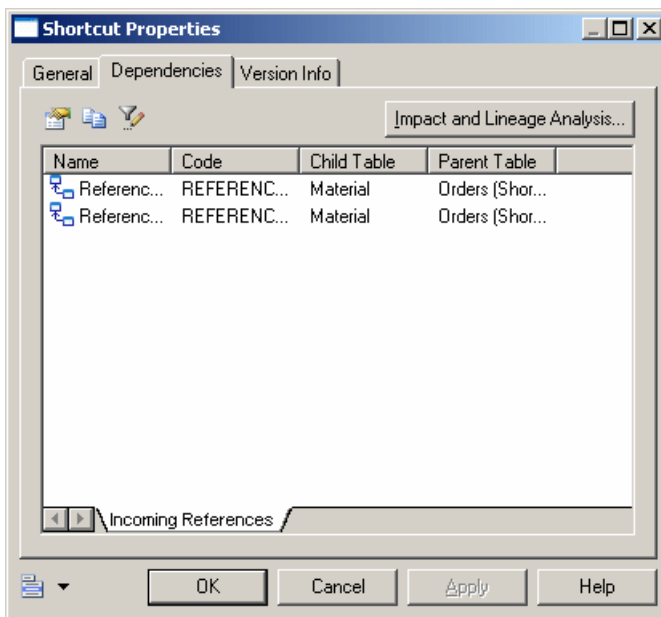
When you make changes to a target object, the shortcut or replica is synchronized instantly or, if the referencing model is closed, when it is next opened. Both the referencing and target models must be open for synchronization to occur.

If you create an external shortcut or a replica from a target model that has never been saved, you should save the target model before the referencing model in order to allow synchronization between the models. If you attempt to save the referencing model first, you will be prompted to save the target model.

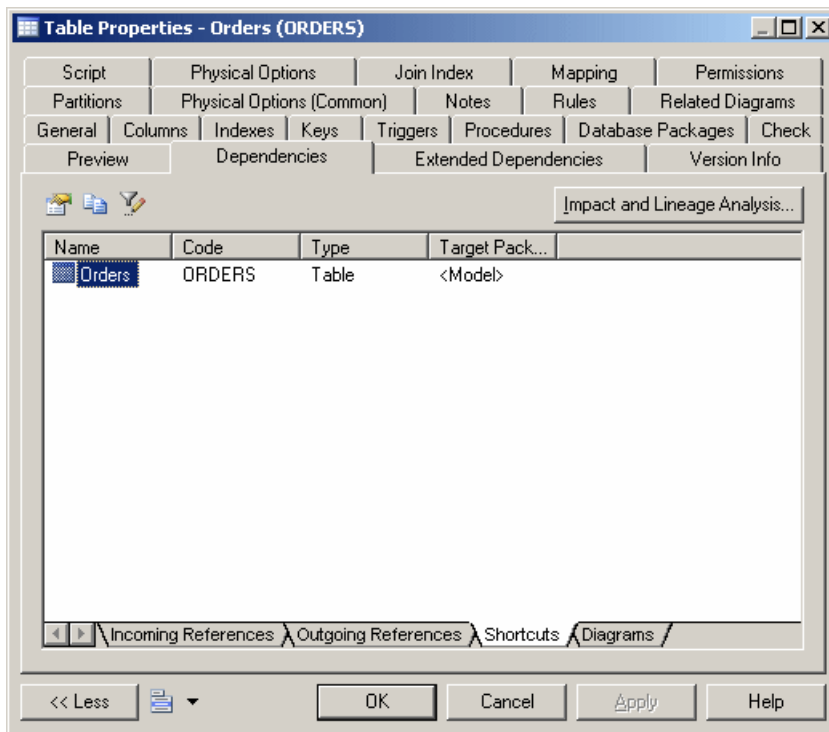
## Viewing Shortcut and Replica Dependencies

To view all the objects that are linked to or otherwise depend on a shortcut or replica, open the property sheet of the shortcut or replica and click the **Dependencies** tab. To view all the shortcuts or replicas that have been created from a target object, open the property sheet of the target object and click the **Dependencies** tab and the **Shortcuts** or **Replicas** subtab.

The **Dependencies** tab on a shortcut or replica property sheet lists all the objects dependent on the shortcut or replica in all the models open in your workspace, and we recommend that you review this tab before deleting the object from your model. You can double-click an entry in the list to display the dependent object's property sheet, or click the **Impact and Lineage Analysis** button to determine the impact of deleting the shortcut or replica.



The **Shortcuts** and **Replicas** subtabs on an object property sheet **Dependencies** tab list all the shortcuts and replicas that have been created from the object in all the models open in your workspace:



## Working with Target Models

Shortcuts and replicas that you create yourself, as well as the shortcuts that PowerDesigner creates automatically when you link or map objects or perform other tasks, all point to objects in other models, which are called *target models*.

These models are listed in the Browser in the Target Models category with status icons to indicate whether your local copies are the latest available in the repository (see *Chapter 2, The Browser* on page 35).

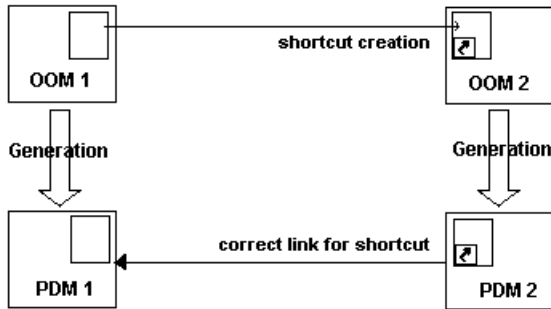
This list of models is also available by selecting **Model > Target Models**.



**Note:** If you delete a target model from the List of Target Models, you will also delete all the shortcuts that reference it in the present model and transform any replicas that reference it into independent objects. You cannot undo deleting or changing a target model.

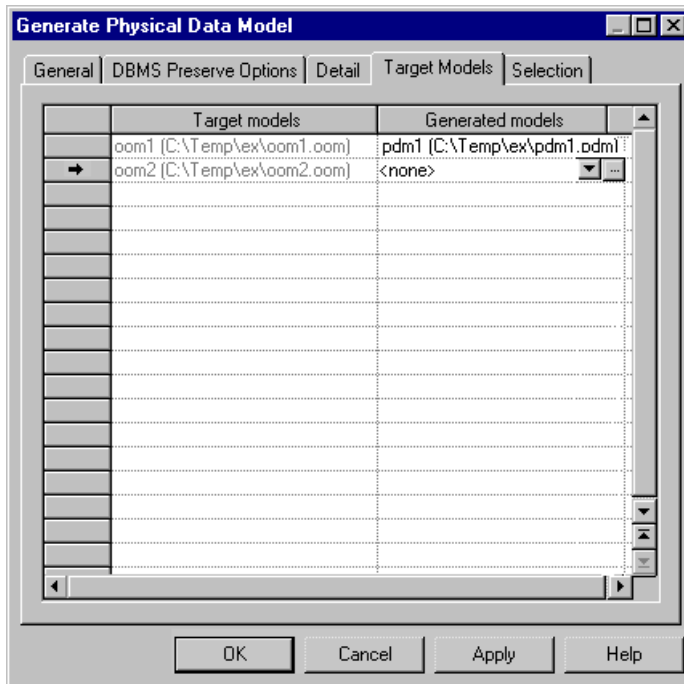
If you generate another model from your model, you can choose not to generate your shortcuts and replicas. If you generate your shortcuts, you can choose to generate them as shortcuts or to transform them into independent objects. If you intend to generate to another type of model (for instance, a PDM from an OOM) and want to retain your shortcuts and replicas, then you should first generate the target models from which they were created, so that your generated model will have appropriate target objects to synchronize them with.

For instance, if you have shortcuts of classes in your OOM, and want to generate a PDM from it, you should generate your target OOMs to PDMs, so that the table shortcuts generated from your class shortcuts will have target table objects to synchronize with. In the following example, the class shortcuts in OOM2 are generated to table shortcuts in a PDM2:



The necessary steps for correctly generating the class shortcuts and replicas as table shortcuts and replicas are:

1. Create the classes in OOM1, and create shortcuts or replicas to them in OOM2. Ensure that the **Generate** option on the shortcut properties sheet is selected and that the **Generated as** option is set to *Shortcut* (see *Shortcut Properties* on page 459). For replicas, you must ensure that the **Generate** option on the associated replication property sheet is selected (see *Desynchronizing Replica Properties* on page 464). If this option is not selected, the replica will not be generated.
2. Generate OOM1 to PDM1 to provide target table objects for the shortcuts and replicas to be generated from OOM2.
3. Before generating OOM2 to PDM2, review the **Target Models** tab of the model generation dialog (see *Model Generation Options* on page 436) to ensure that PDM1 is listed in the Generated Models column. If OOM1 is closed in the workspace, you should click in the Generated Models column to open it, and you can then select PDM1 from the list in the cell:



4. Click **OK** to perform the generation. Your shortcuts and replicas will be retained in the generated model.



## CHAPTER 16      Object Mappings

Object mapping allows you to establish connections between objects belonging to heterogeneous models and diagrams. You create mappings between objects to model *O/R (Object-Relational)* mappings, which associate classes with tables to store OOM objects into a relational database, or simply to express a correspondence between objects in different models.

The following table lists the supported types of model-to-model mapping in PowerDesigner:

Source Model	CDM Target	LDM Target	PDM Target	OOM Target	XSM Target
CDM	X	X	X	X	
LDM	X	X	X	X	
PDM	X	X	X	X	X
OOM	X	X		X	X
XSM					X

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**Note:** Mappings are also used to define data replications in the DMM. For more information, see *Data Movement Modeling > Data Movement Diagrams > Replication Processes (DMM)*.

---

You can create mappings:

- in the Mapping Editor - which gives you a global view of all the mappings to objects in the current (target) model (see *The Mapping Editor* on page 477)
- on the Mapping tab of the property sheet of the target object (see *Creating Mappings from an Object's Property Sheet* on page 491)
- During model generation, by selecting the **Generate Mappings** option in the Model Generation Options window (see *Generating Models* on page 435).

Each mapping is recorded in a query, a textual expression or an XPATH expression defined in the target object, which permits the selection of data from the data source and its transfer to the target model. You can view and refine these mappings in the Mapping Editor.

The following tables list the objects that can be mapped for each kind of model.

### *CDM Mappings*

CDM objects can be mapped to other model objects as follows:

CDM Source Objects	CDM Target Objects	LDM Target Objects	PDM Target Objects	OOM Target Objects
Entity	Entity, Association, Relationship	Entity, Relationship	Table	Class, Association
Entity attribute	Entity attribute, Association attribute	Entity attribute	Column	Class attribute
Relationship	Entity, Association, Relationship	Entity, Relationship	Table, Reference	Class, Association
Inheritance	Inheritance	Inheritance	-	-
Inheritance attribute	Inheritance attribute	Inheritance attribute	-	-
Association	Entity, Association	Entity, Relationship	Table, Reference	Class, Association
Association Attribute	Association attribute, Entity attribute	Entity attribute	Column	Attribute
Data item	Data item	-	-	-
Domain	Domain	Domain	Domain	Domain

---

**Note:** You can map inheritances with CDM objects only when its child entities are not generated, i.e. when the "Generate children" option is deselected in the Generation tab of the inheritance property sheet.

---

### *LDM Mappings*

LDM objects can be mapped to other model objects as follows:

LDM Source Objects	CDM Target Objects	LDM Target Objects	PDM Target Objects	OOM Target Objects
Entity	Entity, Relationship, Association	Entity, Relationship	Table	Class, Association
Entity attribute	Entity attribute	Entity attribute	Column	Attribute
Relationship	Entity, Relationship	Entity, Relationship	Table, Reference	Class, Association
Inheritance	Inheritance	Inheritance	Reference	Generalization

LDM Source Objects	CDM Target Objects	LDM Target Objects	PDM Target Objects	OOM Target Objects
Inheritance attribute	Inheritance attribute	Inheritance attribute	-	-
Domain	Domain	Domain	Domain	Domain

### *PDM Mappings*

PDM objects can be mapped to other model objects as follows:

PDM Source Objects	CDM Target Objects	LDM Target Objects	PDM Target Objects	OOM Target Objects	XSM Target Objects
Table	Entity, Relationship	Entity, Relationship	Table, Fact, Dimension	Class, Association	Element, Complex type
Table column	Entity attribute	Entity attribute	Table column, Measure, Dimension attribute	Attribute	Element, Complex type
View	-	-	Fact, Dimension	Class	-
View column	-	-	View column, Table column, Measure, Dimension attribute	Attribute	-
Reference	Relationship	Relationship	Reference	Class, Association	-
Domain	Domain	Domain	Domain	Domain	-

### *OOM Mappings*

OOM objects can be mapped to other model objects as follows:

OOM Source Objects	CDM Target Objects	LDM Target Objects	OOM Target Objects	XSM Target Objects
Class	Entity, Association, Relationship	Entity, Relationship, Inheritance	Class	Element, complex type

OOM Source Objects	CDM Target Objects	LDM Target Objects	OOM Target Objects	XSM Target Objects
Attribute	Entity attribute, Association attribute	Entity attribute, Inheritance attribute	Attribute	Element, Complex type
Generalization	-	Inheritance	Generalization	-
Association	Association	Entity, Relationship	-	-
Domain	Domain	Domain	Domain	-

### *XSM Mappings*

XSM elements and complex types and their attributes can only serve as source objects for mapping to other XSM elements, complex types and attributes, but they can serve as the targets for mappings from OOM or PDM source objects.

## Creating a Data Source

A data source provides a connection to one or more other models for mappings and (in the PDM) can also provide a connection to a database. You are prompted to create a data source with a wizard the first time you open the Mapping Editor or click the **Create Mapping** tool on an object property sheet **Mappings** tab.

- On the Data Source Identification page, enter an appropriate name for the data source, and then specify an access type, which, for PDM data sources, controls the types of queries available in the **Mappings** pane, and the availability of forward (Source > Target) and reverse (Target > Source) mappings. You can choose between:
  - Read/Write – Enables Criteria, Select, Insert, Update and Delete queries.
  - Read-Only - Enables Criteria and Select queries. You can only create forward mappings, and the data source is not displayed during reverse mapping (see *Creating Reverse Mappings* on page 490).
  - Write-Only - Enables Criteria, Insert, Update and Delete queries. You can only create reverse mappings, and the data source is not displayed during forward mapping.
- Select the type of the model to use as the data source, and click **Next** to go to the Source Model Selection page.
- Select one or more models from the list of open models in the workspace, and then:
  - For data sources created from an object's **Mappings** tab - click **Finish** to create the data source and open a selection dialog to choose the external object to map to.
  - For data sources created from the Mapping Editor - click **Next** to go to the **Options** page. By default, the **Create default mappings** option, which creates mappings where

possible based on shared names, is selected. Click **Finish** to create the data source and proceed to the Mapping Editor.

To view or edit a data source's properties, double-click its Browser or list entry. The property sheet tabs and fields listed here are those available by default, before any customization of the interface by you or an administrator. The **General** tab contains the following properties:

Property	Description
Name/Code/Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Model Type	Specifies the type of the models referenced in the data source.
Access type	For PDM data sources, controls the types of queries available in the <b>Mappings</b> pane, and the availability of forward and reverse mappings.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

The following tabs are also available:

- **Models** - Lists the models associated with the data source. Use the **Add Models** tool to add models open in the current workspace.
- **Database Connection** - [for data sources created in a PDM] Contains the parameters needed to connect to the database associated with the data source. Click the **Select a Data Source** tool to specify an ODBC data source or connection profile (see *Connecting to a Data Source* on page 27).
- **Cost** - [for data sources created in a PDM that supports lifecycle modeling] Lets you specify the cost per GB of storage for the data source along with the compression rate, which is used to estimate the relative size of the data once it has been loaded to the data warehouse (where 100% indicates no compression).
- **Data Movement (Lifecycle)** - [for data sources created in a PDM that supports lifecycle modeling] Lets you define parameters to connect to a remote database, whose data will be loaded into the warehouse.

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**Note:** For information about the **Create Data Source** and **Add Model to Data Source** tools available in the Mapping Editor, see *Mapping Editor Tools* on page 489.

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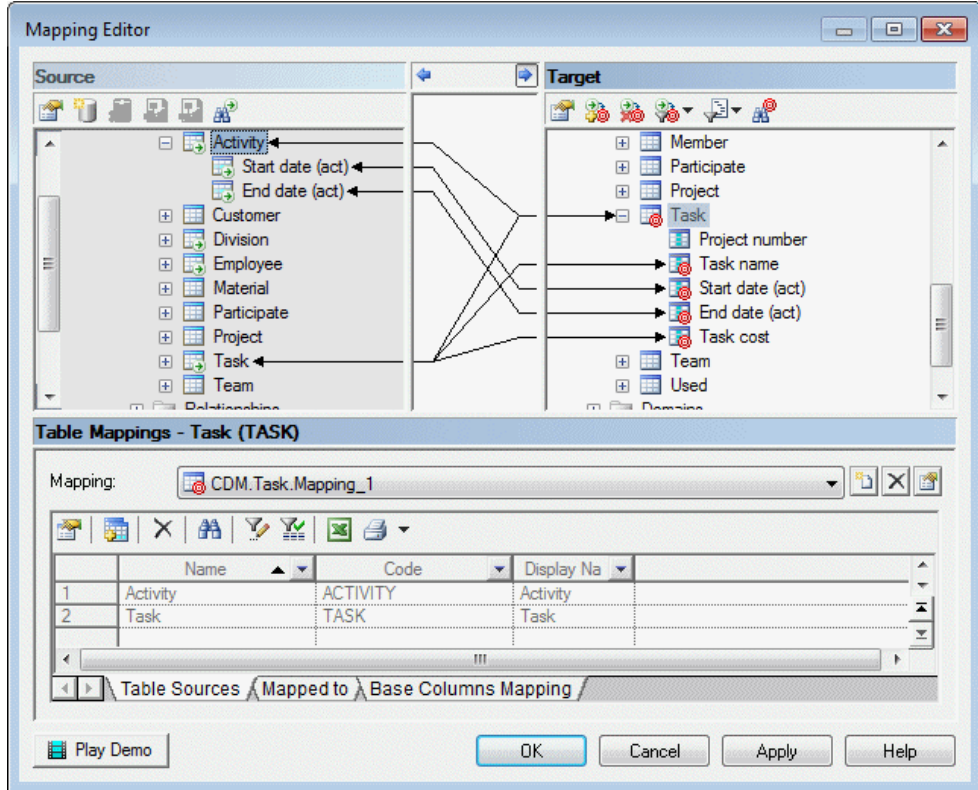
## The Mapping Editor

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The Mapping Editor provides a graphical interface for creating and viewing mappings between models or between metamodels. It provides a global view of all the mappings to

## CHAPTER 16: Object Mappings

objects in your model, allowing you to quickly identify those which are mapped and unmapped.



To open the Mapping Editor, select **Tools > Mapping Editor**. If no data source is defined in your model, you will be prompted to create one (see *Creating a Data Source* on page 476).

The Mapping Editor window is divided into three panes:

- **Source** – on the left side has a gray background and contains one or more data sources, which each contain one or more models. Expand the model nodes to display all their mappable objects and sub-objects.

---

**Note:** To expand all nodes, click in the pane and press the number pad \* key.





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- **Target** – on the right side has a white background and contains all the mappable objects and sub-objects in your model. The details of any mappings you create are saved in the objects in this model.
- **Mappings** - at the bottom contains either a list of mappings (when a model, package or folder is selected) or the selected object's property sheet **Mappings** tab (see *Object and Sub-Object Mapping Properties* on page 493).

Mappings are represented as links drawn between a source and a target object, with an arrow at one or both ends to indicate in which directions data can flow. Double-clicking the link in the

**Source** or **Target** pane opens the property sheet of the source or target object, while clicking it in the area between the panes, displays the properties of the mapping in the **Mappings** pane.

An overlay is displayed on the bottom right corner of objects bearing mappings (and, for sub-objects, their parent objects) and a smaller overlay on the containing model, package or folder (or, for XSM elements, ancestor elements):

Mapped Object		Containing Model, Package, or Folder	
Source	Target	Source	Target
			

---

**Note:** Click the Play Demo tool in the lower-left corner of the Mapping Editor window to launch a video that briefly illustrates its main features.

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## Model-to-Model Mappings

You can create mappings in the Mapping Editor by drag and drop, or by using the **Create Mapping** tool or contextual command. You can select multiple objects and sub-objects in the **Source** pane using the **Ctrl** or **Shift** keys, but only one object in the **Source** pane.

To create a mapping, perform one of the following actions:

- **Drag and drop** - Select one or more objects and sub-objects in the **Source** pane and drag and drop them onto an object or sub-object in the **Target** pane. The pointer becomes a barred circle when it is over an object to which the selected objects cannot be mapped, and if one source object in a multi-selection would create an invalid mapping, the whole selection is rejected.
- **Target pane** - Select an object or sub-object in the **Target** pane and (optionally for objects), one or more objects and sub-objects in the **Source** pane and click the **Create Mapping** tool (or right-click one of the selected objects and select **Create Mapping**). If the selected source objects are ambiguous or would create an invalid mapping, a selection dialog opens, allowing you to select the source objects to map to.
- **Mappings pane** - Select an object or sub-object in the **Target** pane and click the **Create Mapping** tool in the **Mappings** pane. For objects, a selection dialog opens, allowing you to select the source objects to map to. For sub-objects, an empty mapping is created, which you should complete by selecting a source object on the **Sources** sub-tab.
- **Default mappings** - To create default mappings between source and target objects that have the same name, right-click a data source and select **Generate Default Mappings**.

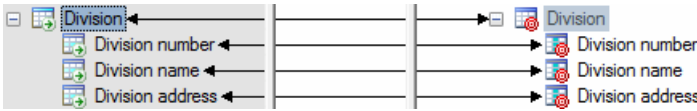
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**Note:** If a mapping already exists between a source and target object, then dragging and dropping will reuse and add additional information to the existing mapping object, while using the **Create Mapping** tool or contextual command will create a second mapping object. Each mapping object is available in the **Mapping** list at the top of the **Mappings** pane.

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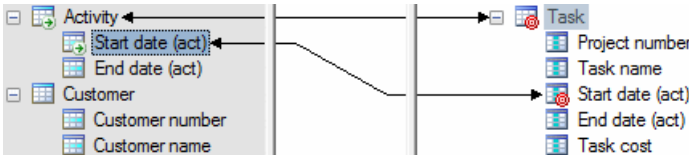
Mappings can be created for combinations of source and target objects and sub-objects as follows:

- Source object mapped to target object - The objects are mapped together, and any sub-objects that have the same name and code are also mapped together. A mapping overlay is displayed on each of the source and the target objects and sub-objects mapped, and a link is drawn between them:



The mapping details are shown in the **Mappings** pane. The source objects are shown on the **Sources** sub-tab, and any sub-objects are shown on the **Sub-object Mappings** sub-tab.

- Source sub-object mapped to target sub-object – The sub-objects and their parent objects are mapped together and the mapping is added to the list on the **Sub-object Mappings** sub-tab of the parent object.



- Source sub-object mapped to target object – The parent source object is mapped to the target object.
- Source object mapped to target sub-object – Not permitted.

Mappings (including sub-object mappings) are always stored in target objects (for example, a mapping between a source CDM entity attribute and a target PDM table column will be stored in the table).

**Note:** In an XSM, elements can appear at any level in the hierarchy, and objects and sub-objects can be freely mapped to any element. Each element (whether parent, child, or grandchild) stores its own mappings, except in the case of elements bearing a complex type, where all mappings to any sub-elements are stored on the element bearing the type (though they are displayed on the sub-elements).

If you open the Mapping Editor with a source or target XSM containing shortcuts to complex types in a closed model, PowerDesigner will offer to open the model for you. If you choose not to open the model at this time, you can do so at any time by right-clicking a shortcut and selecting **Open Model**:

Shortcuts Closed	Shortcuts Open



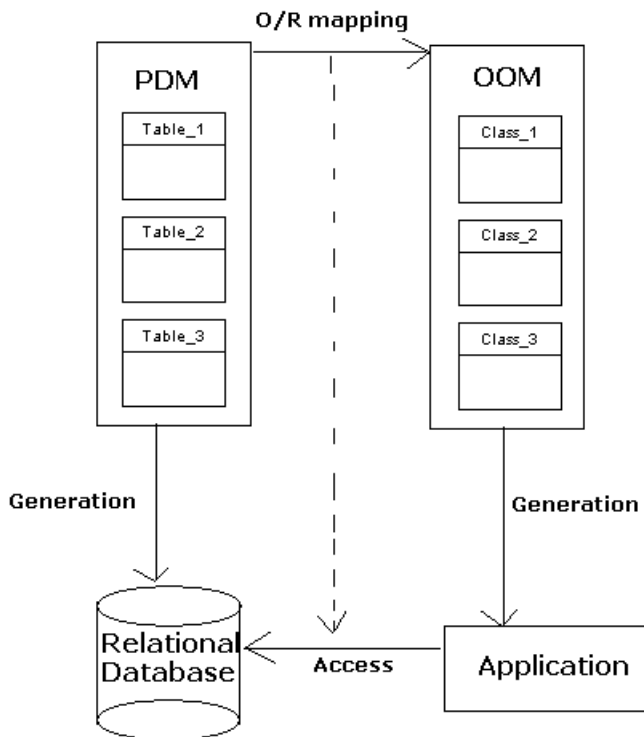
## Object to Relational (O/R) Mappings

Developers tend to use object-oriented programming languages like Java, to develop business objects and components. These objects can be stored in a database. A problem arises when the user tries to store objects in a relational database because object modeling describes a system through objects that have identity, behavior and encapsulated state whereas relational modeling describes a system by its data.

In addition, object language object codes are often different than the codes used to identify tables and columns in a relational database, so that you will need to modify them when generating an OOM into a PDM or vice versa.

You can use object mapping to bypass this impedance-mismatch.

The following schema illustrates the link between classes and tables to store objects in a relational database:



Object persistence implies to store and extract objects in a relational database.

*Mapping Classes with PDM Objects*

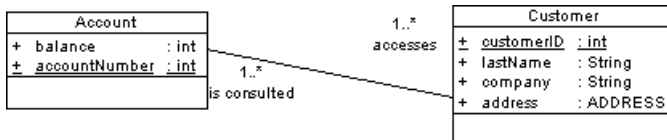
When a class inherits from a non-generated class via a generalization link, the attributes of the class appear in the Selection dialog box in order to let you create a mapping with these inherited attributes. The attributes of a non-generated derived class also appear in the Selection dialog box.

*Mapping Associations with PDM Objects*

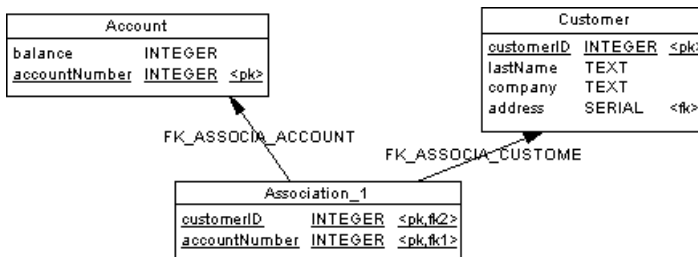
O/R mapping on an association allows you to define the *role navigability* of an association in the database. When an association role is not navigable, there is no need to design a mapping for the association since no information is transmitted between the classes. However, when an association role is navigable, you have to set up the structure for data transmission within the database. In relational databases, data transmission is implemented via foreign keys designed to relate a record in one table with a record in another.

The type of mapping for an association depends on the association multiplicity:

- One-to-one or one-to-many associations can be mapped to a reference in the source model. This reference is used in the database to transfer data and migrate key columns to the appropriate table
- Many-to-many associations have to be mapped to an associative table. This table is created to maintain a relationship between two or more tables in a relational database. The columns contained in the associative table are the combination of the keys in the tables involved in the reference. For example, the following classes have a many-to-many association:



In a relational database, this association is mapped to the following associative table:

*SQL Queries*

When the association roles are navigable, the following queries are automatically computed:

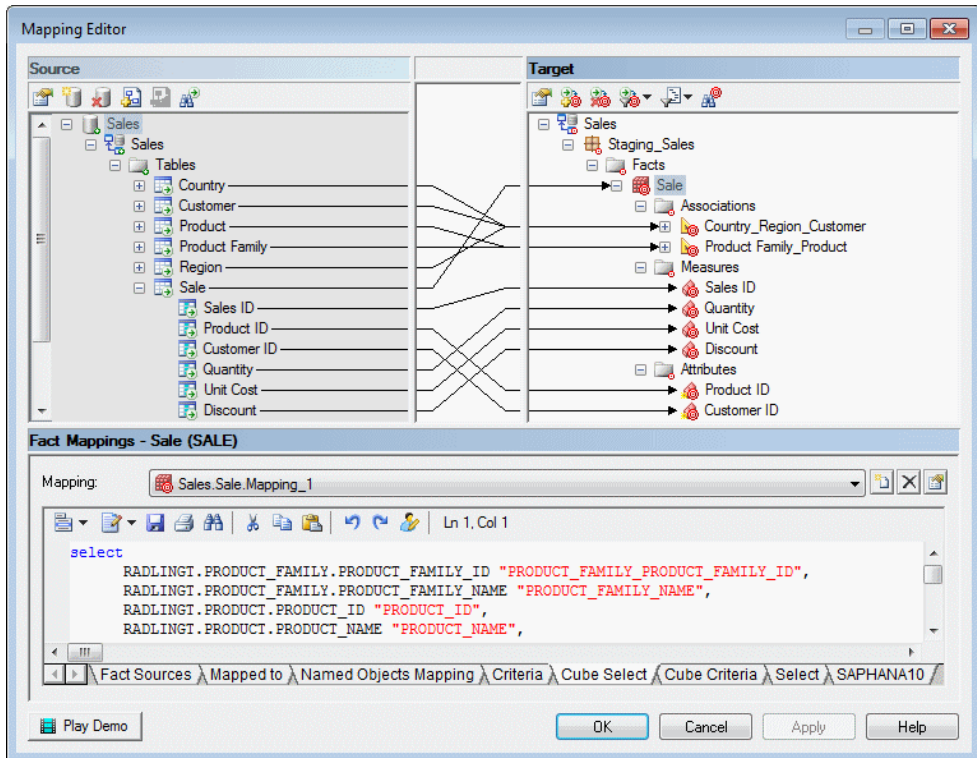
Query	Action
Select (Role A)	Retrieves related class A instances for the role A defined on class B
Insert (Role A)	Associates an instance of class A with class B. It is computed only when the source association is an associative table
Delete (Role A)	Deletes from class B the association with class A. This query is computed only when the source association is an associative table
Select (Role B)	Retrieves related class B instances for the role B defined on class A
Insert (Role B)	Associates an instance of class B with class A. This query is computed only when the source association is an associative table
Delete (Role B)	Deletes from class A the association with class B. This query is computed only when the source association is an associative table

## **Operational to Warehouse Data Mappings**

Data warehousing requires the extraction, transformation, and loading of data from operational systems to a data warehouse database. You can create mappings between operational and data warehouse data and from the data warehouse data and OLAP cubes. To review or edit these mappings, open your multidimensional diagram, and then select **Tools > Mapping Editor**.

You can model operational and data warehouse data structures in PDMs, and specify mappings between the operational data sources and the data warehouse to generate extraction scripts to populate the data warehouse with operational data. In this kind of relational-to-relational mapping, operational tables are mapped to data warehouse tables with a type of fact or dimension, and operational columns are mapped to warehouse columns.

The Generate Cube wizard automatically creates mappings between source tables and facts and dimensions and you can modify these or manually create mappings between these objects:



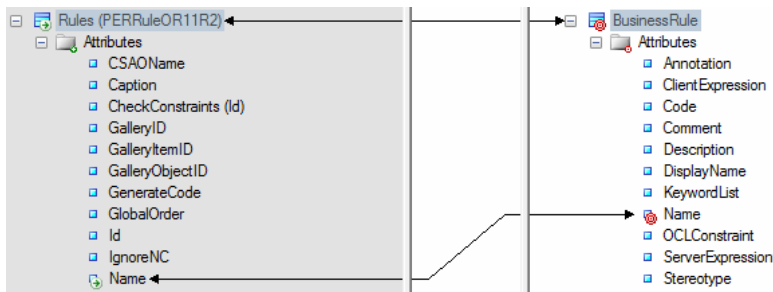
The **Select** sub-tab displays the SQL statement used to select data in the data source. The Generate Cube Data wizard uses this SQL statement to fill the text files used to populate cubes in an OLAP database.

## XML Import Mappings

You control how elements defined in an XML schema are imported by mapping them and their attributes, compositions, and aggregations to objects in the PowerDesigner metamodel. The XML schema is analyzed and presented as a list of metaclasses on the left side of the Mapping Editor and the PowerDesigner metamodel (and any extensions) are displayed on the right side.

**Note:** It is not necessary to map all metaclasses (or all their contents), but only those with which you want to work. If the PowerDesigner metamodel does not contain appropriate metaclasses, attributes, compositions, or aggregations to map against, you can create them dynamically here or save any existing mappings, close the Mapping Editor, define or attach appropriate extensions, and then reopen the Mapping Editor to map to them.

1. Drag and drop an external metaclass to a PowerDesigner metaclass to create an import mapping. Any external attributes and collections are automatically mapped to PowerDesigner attributes with which they share a name:



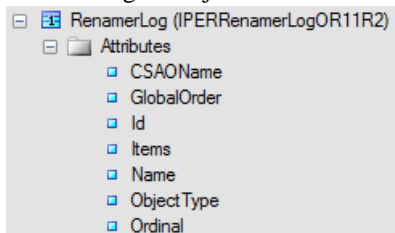
By default, the Mapping Editor lists the standard attributes and collections of metaclasses, which are normally displayed in object property sheets. To display all available properties, click the **Filter Properties** tool, and select **Show All Properties**. You can also filter the tree by using the **Filter Mappings** and **Filter Objects** tools.

**Note:** If no suitable metaclass exists, to create and map to a new extended metaclass based on the `ExtendedObject` metaclass, drag and drop the external metaclass onto the PowerDesigner metamodel root.

2. Drag and drop additional attributes under the metaclass to PowerDesigner attributes with compatible data types to create mappings for them. Attributes are contained in a folder under the metaclass and represent individual properties such as Name, Size, DimensionalType, which have boolean, textual, numeric, or object ID values:

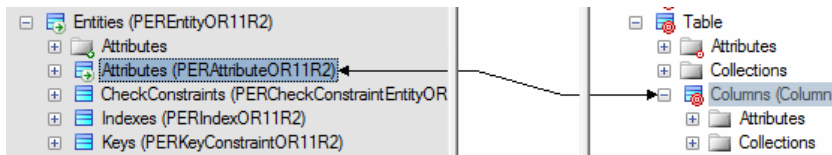


PowerDesigner identifies sub-object metaclasses in the schema that are limited to a single instance and displays a 1 overlay on their icons. Attributes under such metaclasses are treated as belonging to the parent metaclass and can be mapped to attributes under the PowerDesigner object with which the parent is mapped:



**Note:** If no suitable attribute exists, to create and map to a new extended attribute, drag and drop the external attribute onto the PowerDesigner metaclass to which its parent is mapped.

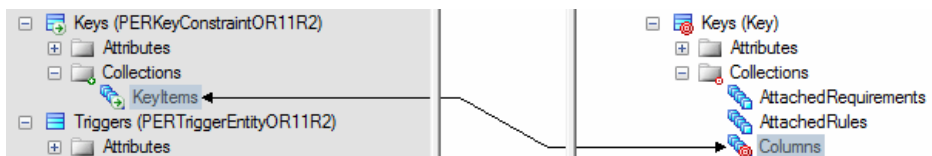
3. Drag and drop external sub-object metaclasses (compositions) under the metaclass to PowerDesigner compositions to create mappings between them:



Any attributes under the sub-object metaclass are automatically mapped to PowerDesigner attributes with which they share a name. Map other sub-object attributes as necessary.

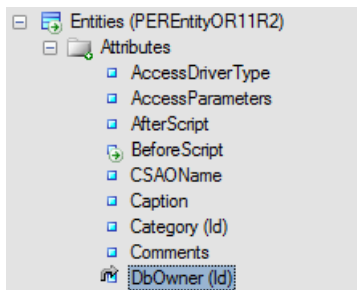
**Note:** In certain circumstances, it may be appropriate to map an external sub-object metaclass to a PowerDesigner object metaclass, and so such mappings are also permitted.

4. Drag and drop external collections (aggregations) under the metaclass to PowerDesigner collections to create mappings between them:

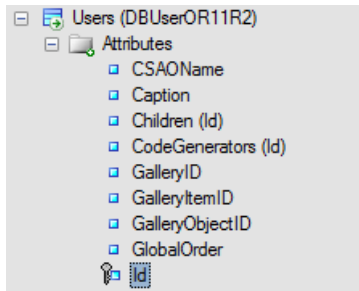


5. In certain schemas, it may be necessary to identify attributes as references and identifiers to link one metaclass to another through aggregation:

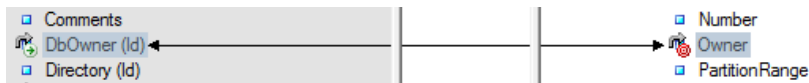
- a) Right-click an attribute and select **Declare as Object Reference** to specify that it acts as a pointer to another object. Such attributes often have a type of GUID, Token, or NCName (PowerDesigner automatically identifies attributes of type IDRef as references). A rounded arrow overlay is added to the attribute icon:



- b) Open the metaclass that the object reference points to, select its identifying attribute, right-click it, and select **Declare as Unique Identifier**. A key overlay is added to the attribute icon:



- c) The object reference attribute can now be mapped to a PowerDesigner attribute of type object (which also bears a rounded arrow overlay):



6. [optional] Select a metaclass and enter an initialization or post-processing script to modify the objects at or after creation (see *Metamodel Mapping Properties* on page 495).
7. [optional] Click the target model (root node) to display the global list of mappings in the **Mappings** pane at the bottom of the dialog and use the arrows at the bottom of the list to change the order in which objects are imported to ensure that dependencies are respected.

---

**Note:** To control the order in which attributes, compositions, and aggregations are imported within objects, select the target metaclass to display its mappings in the **Mappings** pane, and use the arrows at the bottom of the lists on the **Attribute Mappings**, **Collection Mappings**, and **Sub-Object Mappings** sub-tabs.

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8. Click **Apply** to save your changes.

## **Model-to-Model Generation Mappings**

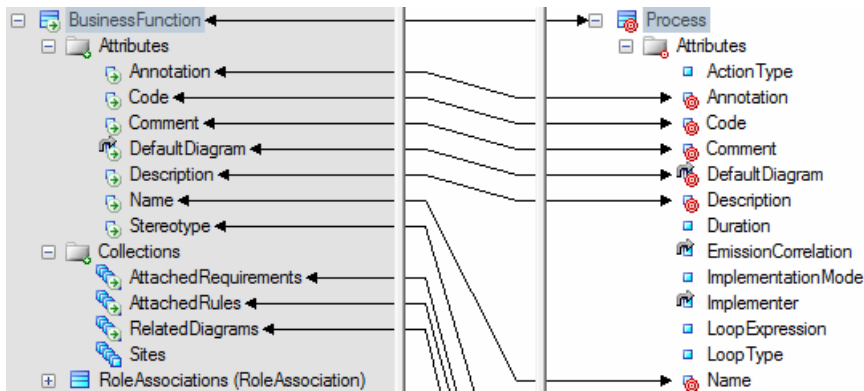
You control how metaclasses from one PowerDesigner model type will be generated to metaclasses in another model type by mapping them and their attributes and collections in the Mapping Editor. Any extensions defined for the source or target metamodels are displayed and available for mapping.

---

**Note:** It is not necessary to map all metaclasses (or all their contents), but only those with which you want to work. If the PowerDesigner metamodel does not contain appropriate metaclasses, attributes, compositions, or aggregations to map against, you should save any existing mappings, close the Mapping Editor, define or attach appropriate extensions, and then reopen the Mapping Editor to map to them.

---

1. Drag and drop a metaclass from the source pane on the left to a metaclass in the Target pane on the right. Any source attributes are automatically mapped to target attributes with which they share a name:



**Note:** By default, the Mapping Editor lists the standard attributes and collections of metaclasses, which are displayed, by default, in object property sheets. To display all available properties, click the **Filter Properties** tool, and select **Show All Properties**. You can also filter the tree by using the **Filter Mappings** and **Filter Objects** tools.

2. Drag and drop additional source attributes under the metaclass to target attributes with compatible data types to map them. Attributes are contained in a folder under the metaclass and represent individual properties such as Name, Size, DimensionalType, containing boolean, textual, numeric, or object ID values:
3. Drag and drop source sub-object metaclasses (compositions) under the metaclass to target compositions to create mappings between them:

Any attributes under the source sub-object metaclass are automatically mapped to target attributes with which they share a name. Map other sub-object attributes as necessary.

**Note:** In certain circumstances, it may be appropriate to map a source sub-object metaclass to a target object metaclass, and so such mappings are also permitted.

4. Drag and drop source collections (aggregations) under the metaclass to target collections to create mappings between them:
5. [optional] Select a metaclass and enter an initialization or post-processing script to modify the objects at or after creation (see *Metamodel Mapping Properties* on page 495).
6. [optional] Click the target model (root node) to display the global list of mappings in the **Mappings** pane at the bottom of the dialog and use the arrows at the bottom of the list to change the order in which objects are generated to ensure that dependencies are respected.

**Note:** To control the order in which attributes, compositions, and aggregations are generated, select the target metaclass to display its mappings in the **Mappings** pane, and use the arrows at the bottom of the lists on the **Attribute Mappings**, **Collection Mappings**, and **Sub-Object Mappings** sub-tabs.







7. Click **Apply** to save your changes.








## Mapping Editor Tools


The Mapping Editor **Source** and **Target** panes contain tools to help you create and review your mappings.

The following tools are available in the **Source** pane:

Tool	Description
	Properties - Opens the property sheet of the selected source object.
	Create Data Source - Launches the Data Source Creation Wizard (see <i>Creating a Data Source</i> on page 476).
	Delete Data Source - Deletes the selected data source, along with any associated mappings. You can delete all the mappings from a source object by selecting it and pressing <b>Delete</b> or right-clicking it and selecting <b>Delete Mapping</b> . You can delete a source object from the source model by selecting it and pressing <b>Shift+Del</b> or right-clicking it and selecting <b>Delete</b> .
	Add Model to Data Source - Adds one or more source models of the same type to the selected data source.
	Remove Model from Data Source - Deletes the selected model from the data source, along with any associated mappings.
	Find Source Object - Opens a Find dialog to search for an object in the <b>Source</b> pane.

The following tools are available in the **Target** pane:

Tool	Description
	Properties - Opens the property sheet of the selected target object.
	Create Mapping - Creates a mapping between the selected source and target objects (see <i>Model-to-Model Mappings</i> on page 479).
	Delete Mappings - Deletes all the mappings for the selected target object. Alternately, press <b>Delete</b> or right-click the object and select Delete Mapping. You can delete a target object from its model by selecting it and pressing <b>Shift+Del</b> or right-clicking it and selecting <b>Delete</b> .
	Filter Mappings - Filters the display of mapping lines to show all mappings or only the mappings on the selected object or those on the selected object and its sub-objects.
	Filter Objects - Filters the display of both the Source and Target trees to show all objects or to show only those objects with or without mappings.

Tool	Description
	Find Target Object - Opens a Find dialog to search for an object in the <b>Target</b> pane.

## Creating Reverse Mappings

The default *forward* mappings define how to populate the objects of the current model with those of the data source model. *Reverse* mappings are typically used in PDM-OOM mapping when, for example, data has several sources and you want to define how the data in the OOM is inserted, updated or deleted in the PDM.

To switch to reverse mapping mode, click the left arrow at the top of the area between the **Source** and **Target** panes. The left pane is renamed to **Target** and the right pane to **Source**, and the mapping tools which appear at the top of each pane are switched:









**Note:** Mappings are always saved in the model on the right-hand side (the model from which you launched the Mapping Editor), whether the pane is called **Target** or **Source**.

If the access type of your data source is Read/Write (see *Creating a Data Source* on page 476), then each mapping that you create is, by default, bi-directional (with an arrow at each end). To create a:

- Read-only (ie forward-only mapping), create the mapping in forward mode and then switch to reverse mode and select and delete it. The mapping link now becomes dotted and has an arrow only on its right end.
- Write-only (ie reverse-only mapping), create the mapping in reverse mode and then switch to forward mode and select and delete it. The mapping link now becomes dotted and has an arrow only on its left end.

When you create uni-directional mappings in this way, the following types of link line can be visible:

Forward Mode	Mapping Type	Reverse Mode
	Forward and reverse (read-write) mapping	
	Forward only (read-only) mapping	
	Reverse only (write-only) mapping	

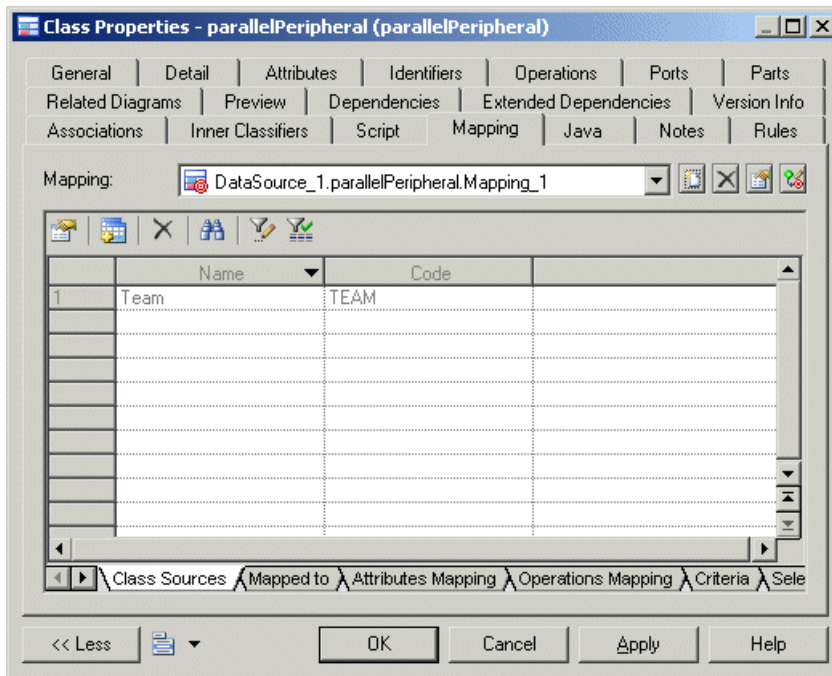
Solid lines indicate that you can edit the details of the mapping in the **Mappings** pane (which, in reverse mode, is renamed to **Reverse Mappings**). In reverse mode, you can modify the default reverse mapping by editing the **Insert**, **Update** and **Delete** sub-tabs.

## Creating Mappings from an Object's Property Sheet

You can create mappings to an individual object on the **Mapping** tab of its property sheet. Mappings created in this way will be visible the next time you open the Mapping Editor.

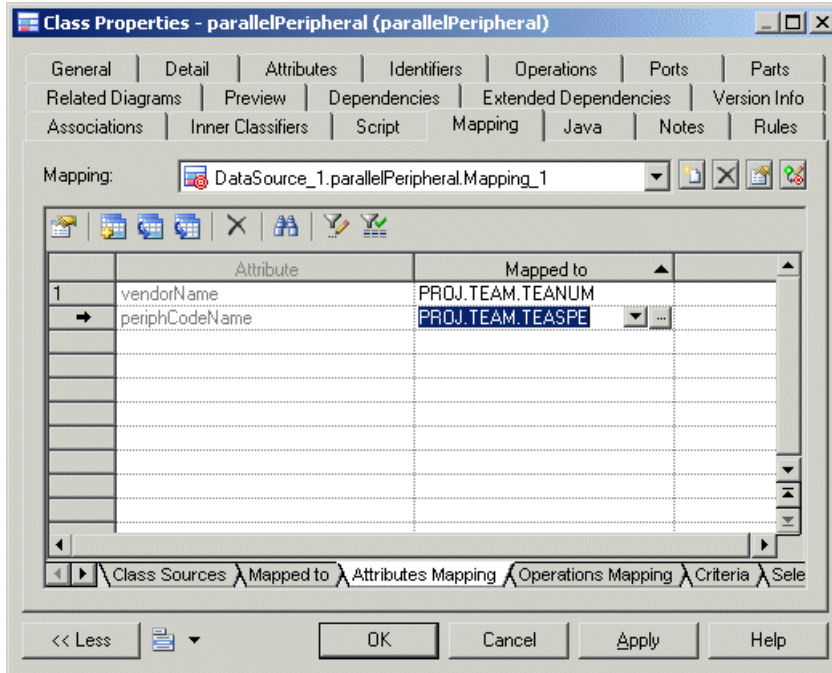
1. Open the property sheet of the object you want to create mappings to and click the **Mapping** tab.
2. Click the **Create Mapping** tool to the right of the **Mapping** list to create a new mapping for the target object. If:
  - No data source has yet been created in the model you will be prompted to create one (see *Creating a Data Source* on page 476).
  - Several data sources are available, you will be prompted to select one and click **OK**.
3. Select the object from the data source to map to the present object and click **OK** to create the mapping.

The new mapping is added in the **Mapping** list and the mapped object is displayed in the **Object Sources** sub-tab:







4. [optional] Click the **Add Objects** tool to select more source objects to map with the object.
5. Click the **Sub-Object Mapping** sub-tab and add or remove mappings between sub-objects (see *Object and Sub-Object Mapping Properties* on page 493)

To automatically generate mappings for sub-objects that share a name, click the **Generate Mapping** tool.



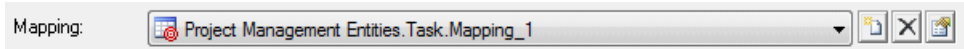
6. [optional] Review the other mapping sub-tabs (which are the same as those available from the mapping's own property sheet (see *Object and Sub-Object Mapping Properties* on page 493) and edit them as appropriate.
7. [optional] Use the **Mapping** list and the tools to its right to review and edit the other mappings defined on the object:

Tool	Description
	Create Mapping - Creates a new mapping with the object as a target.
	Delete Current Mapping - Deletes the currently selected mapping.
	Properties - Opens the property sheet of the currently selected mapping (see <i>Object and Sub-Object Mapping Properties</i> on page 493).
	Launch Mapping Editor - Opens the Mapping Editor (see <i>The Mapping Editor</i> on page 477).

## Object and Sub-Object Mapping Properties

Mappings are sub-objects of the target object on which they are defined. Mappings do not have diagram symbols or Browser entries, and are only accessible from the Mapping Editor or from the **Mapping** tab of their parent object property sheet.

To open a mapping property sheet, select the mapping from the list at the top of the Mapping Editor **Mappings** pane or parent object property sheet **Mapping** tab and click the **Properties** tool.







The tabs available on a particular mapping property sheet depend on the objects being mapped. The **General** tab contains the following properties:

Property	Description
Data Source	Specifies the name of the data source in which the source object is defined. Click the <b>Properties</b> tool to open the property sheet of the data source.
Target	Specifies the name of the target object that owns the mapping.
Parent	[Sub-object mappings] Specifies the name of the parent of the target object.
Name/Code/ Comment	Identify the mapping. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the mapping. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Mapped to	<p>Specifies the mapping expression. You can edit the expression directly in this field, or click the <b>Edit</b> tool to open it in a dedicated SQL or Object Expression editor. In the editor, select an object type from the list in the upper left corner, to display a list of available objects of that type in the upper right corner. Double-click an available object to add it at the insertion point in the expression displayed in the lower half of the editor.</p> <p>To undo your changes and recover the default expression click to release the <b>User-Defined</b> button.</p>

The following tabs are also available:

- **Sources** - Lists the source objects mapped to the object. Use the **Add Sources** tool to add additional source objects to the list.

- **Sub-Object Mappings** - Lists the sub-objects of the mapped object that are mapped with sub-objects of the object. The following tools are available on this tab.

Tool	Description
	Properties - Opens the property sheet of the selected sub-object mapping.
	Add Mapping - Select additional source sub-objects to map. After adding sub-objects, select the sub-objects to map them against in the <b>Mapped to</b> column.
	Create from Sources - Copy sub-objects from the source object to the object. The name, code, description, annotation, and comment are copied and the data types are converted in order to match the current model.
	Generate Mapping - Automatically generate mappings between sub-objects with the same name or code in the source and target models.

Click the Ellipsis button in the **Mapped to** column to edit the source expression for the sub-objects.

- **Operation Mappings** - [OOM classes only] Lists the operations and queries associated with the mapping. Allows you to associate a SQL query to the operation. When an operation implies action on the database, like data retrieval or data update, you can associate this operation with a SQL query that will execute an action in the database. Usually, this query is a SELECT statement used to retrieve one or several instances of the current class according to the operation parameter. It can also be an UPDATE query. In the context of an EJB, the SQL query mapped to an operation is used to implement finder or select methods.
- **Criteria** - Allows you to specify join criteria between source objects. For example:  
EMPLOYEE.ID < 100
- **Query** - Computes a SQL query from the information in the other tabs to retrieve or update data in the database. If you modify the SQL query, it can no longer be automatically calculated, even when you update the mapping. You can recover the computed expression by clicking to release the **User-Defined** tool.

A Select query is available for a forward mapping, and Insert, Update and Delete queries for a reverse mapping:

- The **Select** tab retrieves attribute values of class instances from the database using the class identifying attributes. For example:

```
select
  USER.USERNAME "USERNAME",
  USER.PASSWORD "PASSWORD"
from USER
```

- The **Insert** tab creates an instance of the class and saves it with its attributes. For example:

```
insert into USER(
  USER.USERNAME,
  USER.PASSWORD)
values (
```

```
%USERNAME%,
%PASSWORD%)
```

- The **Update** tab displays a statement that allows you to update attribute values of class instances apart from identifying attributes. For example:

```
update USER
set USER.USERNAME = %USERNAME%,
    USER.PASSWORD = %PASSWORD%
```

- The **Delete** tab displays a statement that allows to delete a class instance from the database using its identifying attributes. For example:

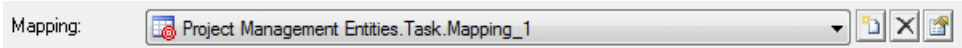
```
delete line* from USER
```

To modify the default syntax of the queries, edit the `SelectStatement`, `InsertStatement`, `UpdateStatement`, and `DeleteStatement` entries in the Profile category of the object language or extension (see *Customizing and Extending PowerDesigner > Extension Files*).

## Metamodel Mapping Properties

Metamodel mappings are mappings between metamodel objects, which control how objects are imported or generated. Metamodel mappings are sub-objects of the PowerDesigner metamodel object on which they are defined.

To open a metamodel mapping property sheet, select the mapping from the list at the top of the Mapping Editor **Mappings** pane or parent object property sheet **Mapping** tab and click the **Properties** tool.



The tabs available on a particular mapping property sheet depend on the objects being mapped. The **General** tab contains the following properties:

Property	Description
Source object	Specifies the metamodel object being mapped to the target object.
Target object	Specifies the metamodel object being mapped from the source object. This object is the parent of the mapping itself.

Property	Description
Transformation script	<p>[metaattribute mappings] Specifies a script to set the value of the attribute. In the following example, from an XML import, the <code>notnullable</code> attribute is imported to the <code>Mandatory</code> attribute and, because the sense of the attributes is reversed, the boolean value imported is set to the opposite of the source value:</p> <pre>Sub %Set%(obj, sourceValue)     obj.SetAttribute "Mandatory", not sourceValue End Sub</pre> <p>In the following example, from an object generation, the <code>NumberID</code> attribute is generated to the <code>Comment</code> attribute and a text string is prepended to make clear the origin of the value:</p> <pre>Function %AdjustValue%(sourceValue, sourceObject, targetObject)     Dim targetValue     targetValue = "The original process NumberID is " +cstr(sourceValue)     %AdjustValue% = targetValue End Function</pre>

The following tabs are also available for metaclass mappings:

- **Initialization** - Specifies a script to initialize the metaclass to be created. In the following example, the value of the `Stereotype` attribute is set to `SimpleType`:

```
Sub %Initialize%(obj)
    obj.Stereotype = "SimpleType"
End Sub
```

- **Attribute Mappings** - Lists the mappings of attributes under the metaclass. Select a mapping and click the **Properties** tool to open its property sheet. To control the order in which attributes are created, in order to respect dependencies between them, use the arrows at the bottom of the list.
- **Collection Mappings** - Lists the mappings of collections under the metaclass.
- **Post-Process** - Specifies a script to modify the metaclass after creation and execution of mappings. In the following example, the value of the **Code** attribute is copied to the **Name** attribute:

```
Sub %PostProcess%(obj)
    ' Copy code into name
    obj.Name = obj.Code
End Sub
```



## Metamodel Object Properties

To view the properties of metaclasses, metaattributes, and metacollections displayed in the Mapping Editor, double-click the object node in the Mapping Editor or right-click the node and selecting **Properties**.

The **General** tab contains the following properties:

Property	Description
Parent	[metaattributes and metacollections] Specifies the metaclass to which the metaobject belongs.
Parent collection	[sub-objects/compositions] Specifies the name of the composition collection that contains the sub-objects under the parent object.
Name	Specifies the name of the metaclass in the PowerDesigner metamodel or XML schema.
Data type	[metaattributes] Specifies the data type of the attribute.
Identifier	[metaattributes] Specifies that the attribute is used to identify the metaclass for referencing by another metaclass.
Reference / Reference path	[metaattributes and metacollections] Specifies that the attribute or collection is used to point to another metaclass to form an aggregation.
Singleton	[metaclasses] Specifies that only one instance of the metaclass is possible under each parent object.
Comment	Provides additional information about the metaobject.

The following tabs are also available for metaclasses:

- **Attributes** - Lists the metaattributes belonging to the metaclass. Select an attribute in the list and click the **Properties** tool to open its property sheet.
- **Collections** - Lists the metacollections belonging to the metaclass. Select a collection in the list and click the **Properties** tool to open its property sheet.



## CHAPTER 17      **Impact and Lineage Analysis**

Before you perform an action on a model object, such as deleting a table or changing the datatype of a primary key column, you can preview which other objects will be impacted (*impact analysis*) and identify the objects that take part in the definition of the object (*lineage analysis*). You can generate the analysis to an impact analysis model (IAM) to review it in a diagram and save it for future reference.

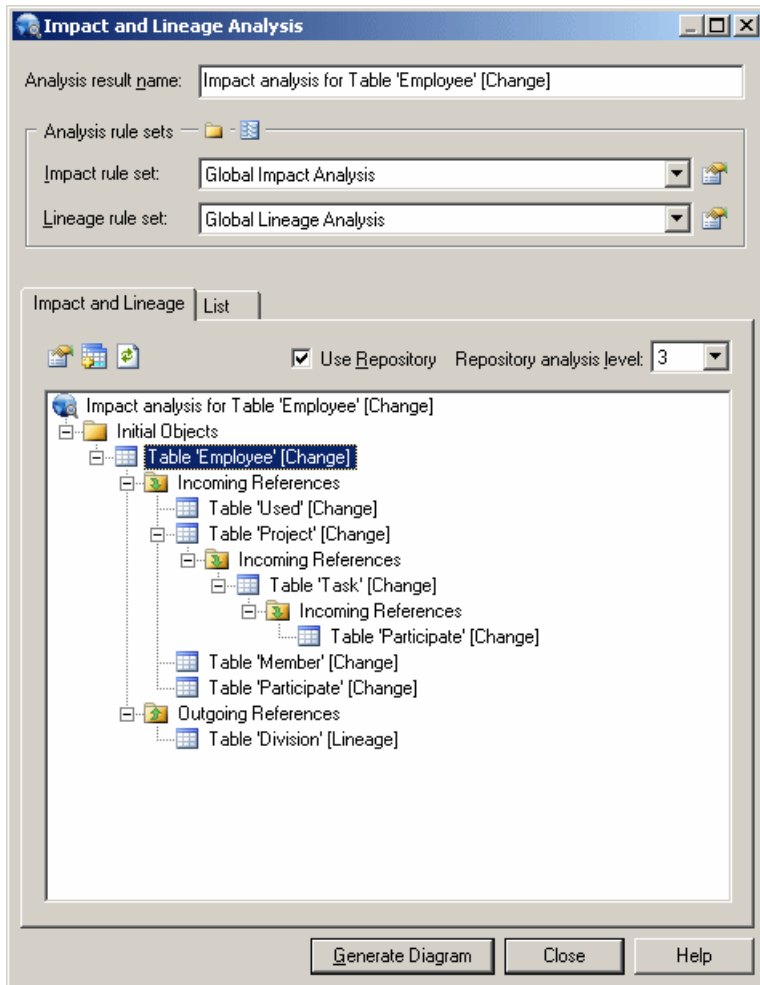
1. Open an impact and lineage analysis in any of the following ways:
  - Select one or more objects in the diagram and select **Tools > Impact and Lineage Analysis** (or press **Ctrl+F11**).
  - Right-click an object in the Browser **Local** tab or diagram and select **Impact and Lineage Analysis**.
  - [when deleting an object] Click the **Impact** button on the Confirm Deletion dialog box.
  - In an object's property sheet, select the **Dependencies** tab, and click the **Impact and Lineage Analysis** button.

---

**Note:** This feature is also available in the repository (see *Impact and Lineage Analysis in the Repository* on page 331) and the PowerDesigner Portal (see *Impact and Lineage Analysis in the PowerDesigner Portal* on page 341)

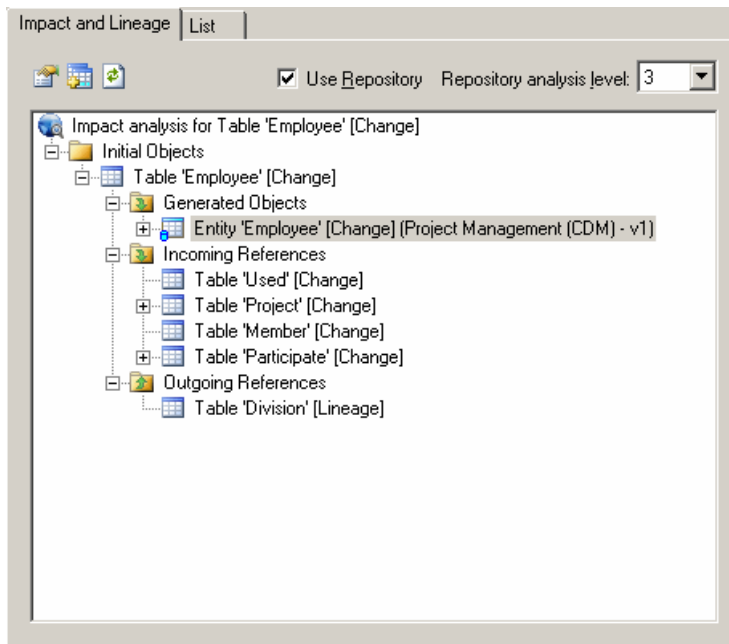
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The analysis applies rules to the initial objects to generate a tree view of influencing (lineage) and dependent (impacted) objects, which appears instantly in the dialog. The following example shows all the objects that will be impacted by a change to the `Employee` table, and all the objects that influence it (lineage analysis):



2. [optional] Select **Use Repository** and specify a **Repository analysis level** to search for additional impacted or lineage objects in the repository. If you are not currently connected to the repository, the **Connect** dialog opens to allow you to do so.

In the example, you see an additional impacted object, an entity that was generated from the table to the Project Management CDM. The blue overlay in the bottom-left corner of the object indicates that it is located in the repository.



3. [optional] Enter a name for your analysis result, which is then used as the name of any generated model.
4. [optional] Change the impact rule set to apply to your analysis:
  - **Conceptual Impact Analysis** – identifies the objects impacted by changes to the object.
  - **Data Impact Analysis** – identifies uses of values contained in the object.
  - **Delete Impact Analysis** – [default when deleting] identifies the objects impacted by the deletion of the object.
  - **Global Impact Analysis** – [default when not deleting] identifies all the objects that depend on the object.
  - **None** – no impact rule set is selected.

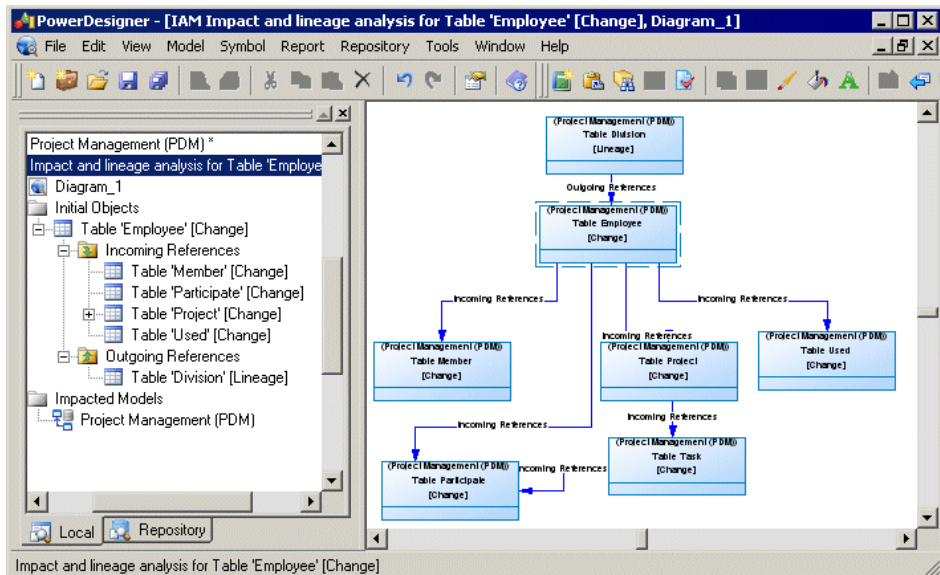
---

**Note:** Click the **Properties** tool to the right of the field to review the selected rule set. Click the **Select Path** tool above the list to change the folder containing rule sets, or the **List of Rule Sets** tool to open any rule set (see *Analysis Rule Sets* on page 512).

---

5. [optional] Change the lineage rule set to apply to your analysis:
  - **Conceptual Lineage Analysis** – identifies the objects that justify the existence of the object, and ensure it fulfills a well-identified need.
  - **Data Lineage Analysis** – identifies the origin of values contained in the object.
  - **Global Lineage Analysis** – [default when not deleting] identifies all the objects that influence the initial object.

- **None** – [default when deleting] no lineage rule set is selected.
6. [optional] Click the **Generate Diagram** button to save the analysis to a diagram in an impact analysis model (IAM). The following example shows the 'Employee' table in the center of the diagram with its influencing objects above it and its dependent objects beneath it:



## Reviewing and Modifying an Analysis

The Impact and Lineage tab displays the result of the analysis in a tree format, showing all the impacted and lineage objects. Each item in the tree displays either an *[action]* suffix to indicate the effect on an impacted object or a *[lineage]* suffix to designate lineage items

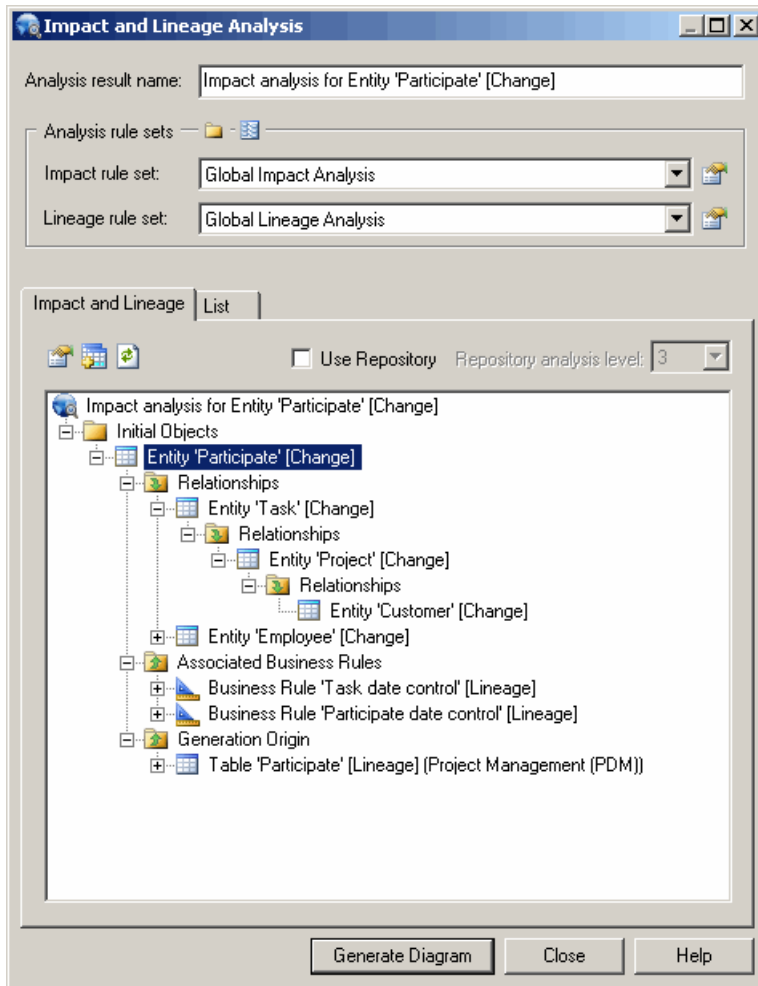
In this example, the analysis shows that:

- A change on the Participate entity will result in changes to the Task and Employee entities with which it has relationships (and that the change will cascade down from the Task entity to the Project and Customer entities).
- The business rules Task date control and Participate date control form part of the definition of the Participate entity, which was generated from the Participate table in Project Management (PDM).




---

**Note:** If an object is dependent multiple times then, for performance reasons, only the first entry appears in detail in the tree. Right-click subsequent undeveloped entries and select **Go to First Occurrence** to jump to the detail.

---



The following tools are available on this tab:

Tool	Description
	Properties – Opens the property sheet of the selected item.
	Add Initial Objects – Opens a selection dialog to add objects to analyze.
	Re-Analyze – Recalculates the analysis from the selected point in the tree downwards. Select the root object to re-analyze the entire tree.

You can modify your analysis in the following ways:

- To extend the analysis to include objects in the repository, select **Use Repository** and specify a **Repository analysis level** to control the number of levels of dependencies to search for.
- To add objects to analyze, click the **Add Objects** tool to open a selection dialog, select one or more objects, and click **OK**.
- To simplify the tree, right-click any object or collection and select **Remove** to remove it and its descendants.

---

**Note:** Right-click any node in the tree and select **Re-analyze** to replace any objects or collections that have been removed in this way. To view the available collections and modify those that appear for an object, right-click it and select **Change Impact Analysis Objects** or **Change Lineage Analysis Objects** (see *Controlling the Display of Object Collections* on page 506).

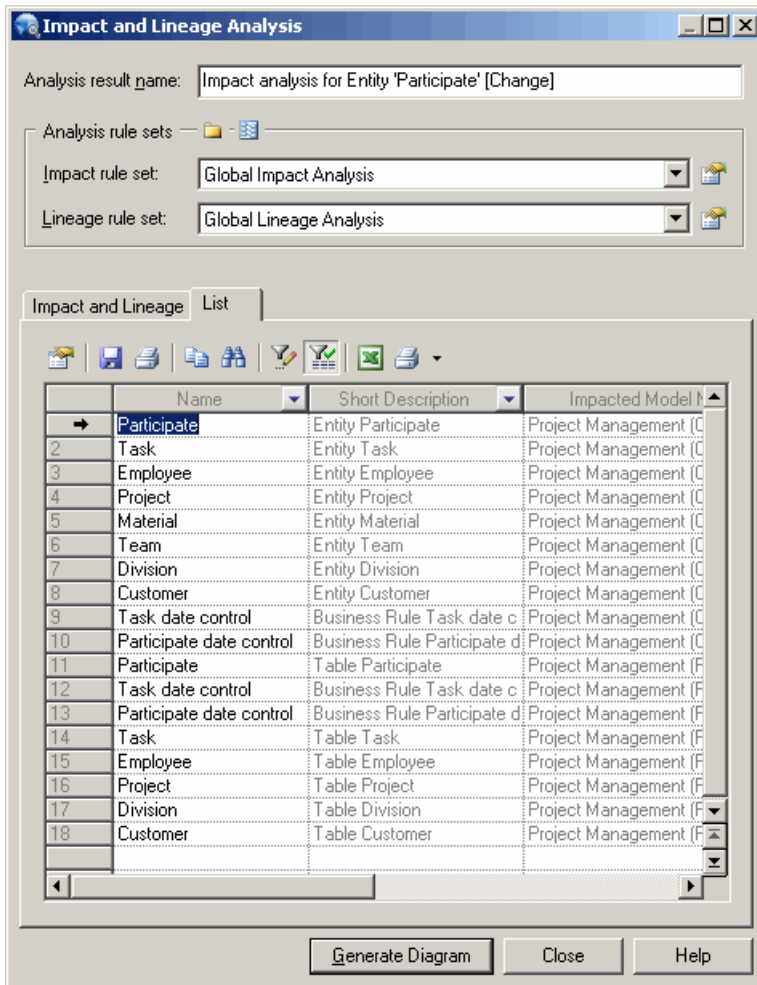
---

- To change the action being analyzed for any object, right-click it and select one of **Change Action to [Change]**, **Change Action to [Delete]**, or **Change Action Description** to open the Action Description dialog (and select one or more of **Delete**, **Change**, and any **User-defined actions** separated by semicolons).
- To change the rule set used in the analysis, select a new rule set from the lists at the top of the dialog.










## Viewing the Preview as a List

The *List* tab displays a tabular report of all the objects contained in the impact and lineage analysis. You can customize the report by filtering which attributes you want to view, save the report in RTF or CSV format, and print it.



The following tools are available on the preview **List** tab:

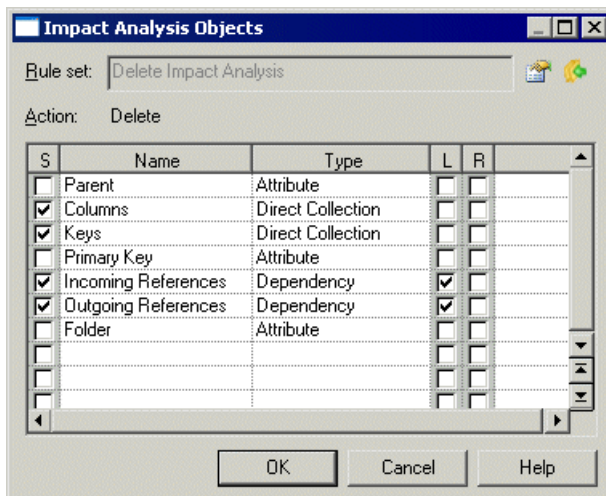
Tool	Description
	Properties – Displays the property sheet of the selected object in the list.
	Save – Saves the list in RTF (for MS Word) or CSV (for MS Excel) format.

Tool	Description
	Print – Prints the list.
	Copy – Copies the list in RTF or CSV format.
	Find a Row – Opens the Find dialog box to let you search the list for a specific object.
	Customize Columns and Filter – Opens the Customize Columns and Filter dialog to select attributes to display in the list and specify expressions to filter by (see <i>Customizing Object List Columns and Filtering Lists</i> on page 113).
	Enable/Disable Filter - Enables or disables the filter on the list.

## Controlling the Display of Object Collections

You can narrow or widen the analysis by changing the collections of impact and lineage objects that appear.

- Open the Impact (or Lineage) Analysis Objects dialog box in any of the following ways:
  - [from preview] Right-click an object in the preview tree, or in the IAM Browser or diagram, and select **Change Impact Analysis Objects** or **Change Lineage Analysis Objects** to open a list of available collections of objects. A collection is listed here only if one or more impact (or lineage) objects belonging to the collection are present in the current analysis:



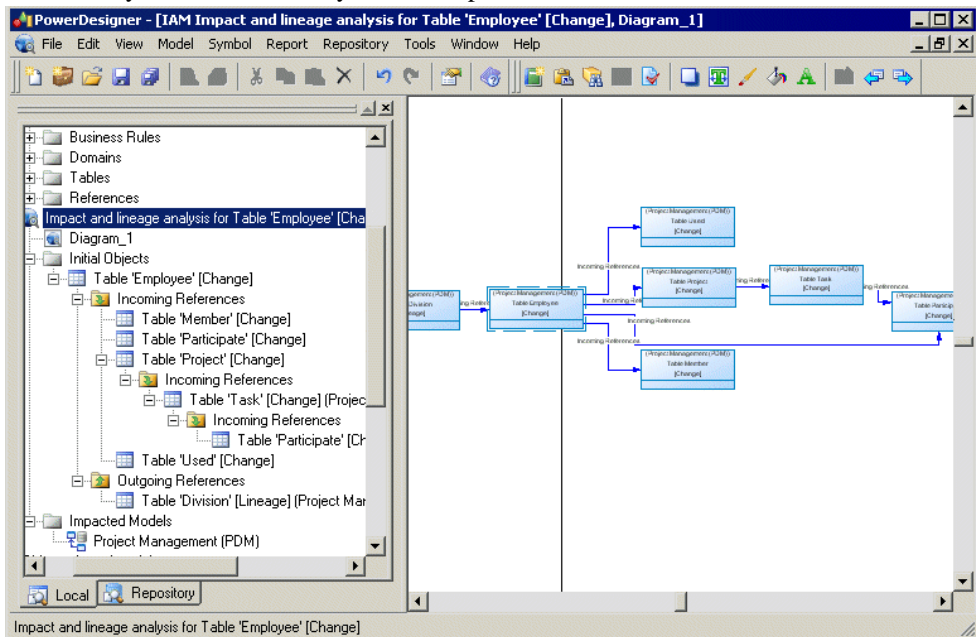
- Select or unselect the following check boxes to control the display of collections:
  - S [Selected]** - enables the display of the collection in your analysis.

- **L** [Replace link object by extremity] - If the object is a link, this option hides it to simplify the display and view only the object at the other end of the link.
  - **R** [Recursive] - Displays recursive collections in a single list.
3. [optional] Click the **Properties** tool to open and review or edit the analysis rule set in the Resource Editor (see *Analysis Rule Sets* on page 512).
  4. [optional] Click the **Apply Changes to Rule Set** tool to apply your changes to the rule set so that they are automatically applied next time.
  5. Click **OK** to close the dialog box.

The display of the selected object collections is updated in the preview tree or IAM. If you re-analyze your model, then the collection rules specified in the rule set are reapplied.




## Reviewing and Modifying an IAM Model

You generate an impact analysis model (IAM) by clicking the **Generate Model** button on the Impact and Lineage Analysis dialog box. An IAM provides a graphical view of your analysis and allows you to save the analysis as a snapshot for later reference.



In the above example, the `Employee` table shows influencing (lineage) objects on the left and dependent (impacted) objects on the right. Links between the objects represent the analysis rules that propagate actions on objects.

The following types of objects are available in an IAM:

Symbol	Description
	Initial objects - The model objects being analyzed have symbols surrounded by dotted lines. In the Browser, click to expand the initial object to view the tree of its incoming references (impacted objects) and outgoing references (lineage objects). You can also see the list of initial objects by selecting <b>Model &gt; Analysis Objects</b> .
	Impacted and lineage objects - The model objects that are impacted by or influencing the initial objects. In the Browser, these collections of objects are inside folders bearing a downward arrow (↓) for impacted objects or an upward arrow (↑) for lineage objects.
	Link - Analysis rule between initial objects and impacted objects.
[none]	Impacted Models - The models that are impacted by the change. You can see the list of impacted models in the Browser or by selecting <b>Model &gt; Analysis Models</b> .

---

**Note:** You can add graphical objects, such as notes or decorative symbols, to your diagram.

---

You can modify your analysis in the following ways:

- To extend the analysis to include objects in the repository, select **Tools > Change Analysis Options** to open the **Impact and Lineage Analysis Options** dialog, select **Use Repository** and specify a **Repository analysis level** to control the number of levels of dependencies to search for.
- To add or remove initial objects to analyze, click **Tools > Change Analysis Options**, select the **Initial Objects** tab, and use the **Add Objects** or **Delete** tool.
- To remove any object or collection and its descendants to simplify the tree, select it in the Browser or diagram and press **Delete**.

---

**Note:** Right-click any node in the Browser or diagram and select **Re-analyze** to replace any objects or collections that have been removed in this way. To view the available collections and modify those that appear for an object, right-click it and select **Change Impact Analysis Objects** or **Change Lineage Analysis Objects** (see *Controlling the Display of Object Collections* on page 506).

---

- To change the action being analyzed for any object, right-click it and select one of **Change Action to [Change]**, **Change Action to [Delete]**, or **Change Action Description** to open the Action Description dialog (and select one or more of **Delete**, **Change**, and any **User-defined actions** separated by semicolons).
- To change the rule set used in the analysis, click **Tools > Change Analysis Options** to open the **Impact and Lineage Analysis Options** dialog, select a new rule set and click **OK**.

## **IAM Model Properties**

The model property sheet displays the definition of the current IAM. You can check the last analysis date of your model or add a comment, for example.

To open an IAM property sheet, double-click its Browser entry. The General tab contains the following properties:

Property	Description
Name / Code / Comment	Identify the model. The name should clearly convey the model's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the model. By default the code is auto-generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Filename	Specifies the location of the model file. This field is empty if the model has never been saved.
Author	Specifies the author of the model. If you enter nothing, the Author field in diagram title boxes displays the user name from the model property sheet Version Info tab. If you enter a space, the Author field displays nothing.
Version	Specifies the version of the model. You can use this box to display the repository version or a user-defined version of the model. This parameter is defined in the Title page of the model display preferences.
Default diagram	Specifies the diagram that appears by default when you open the model.
Last analysis date	[Read-only] Computed date of the last model analysis, which is updated every time you re-analyze the model.
Keywords	Provide a way of loosely grouping objects through tagging. To enter multiple keywords, separate them with commas.

## **Setting IAM Display Preferences**

PowerDesigner display preferences let you customize the format of object symbols and the information that appears on them. To set IAM display preferences, select **Tools > Display Preferences**, or right-click the diagram background, and select **Display Preferences**.

These display preferences are available for analysis objects:

Preference	Description
Model name	Displays the model name of the analysis object.
Object type	Displays the type of the analysis object.

Preference	Description
Action	Displays the action name of the analysis object.
Highlight initial object	Displays a dotted line around the symbol of the initial object.

The following display preferences are available for analysis links:

Preference	Description
Name	Displays the name of the link.

For information about changing the format of symbols, see *Format Display Preferences* on page 212.

## Comparing Two IAM Models

Select **Tool > Compare Models** to view the differences between two IAMs. The comparison window displays the objects contained within the models in a tree format, and highlights the differences between them.

For detailed information about comparing models, see *Chapter 7, Comparing and Merging Models* on page 223.

## Printing an Analysis

You can print the preview list or the IAM model diagram, or create a list report in the IAM to document and discuss proposed changes.

You can print the analysis in any of the following ways:

- [from Preview] Click the **List** tab (see *Viewing the Preview as a List* on page 505) and select the **Print** tool.
- [from the IAM] Select **File > Print** to print the diagram (see *Printing Diagrams* on page 173).
- [from the IAM] Select **Reports > List Report Wizard** to create a list report for an object type and print it (see *Creating a List Report* on page 370).

## IAM Custom Checks

PowerDesigner does not provide any predefined checks for the data testing of an IAM. However, you can create custom checks in an extension.

For information about developing custom checks, see *Customizing and Extending PowerDesigner > Extension Files*.

You can check an IAM in any of the following ways:

- Press F4.
- Select **Tools > Check Model**.
- Right-click the diagram background and select **Check Model**.

The Check Model Parameters window opens, which allows you to specify the kinds of checks to perform, and the objects to apply them to. For detailed information about this window and correcting problems reported, see *Checking Models* on page 137.

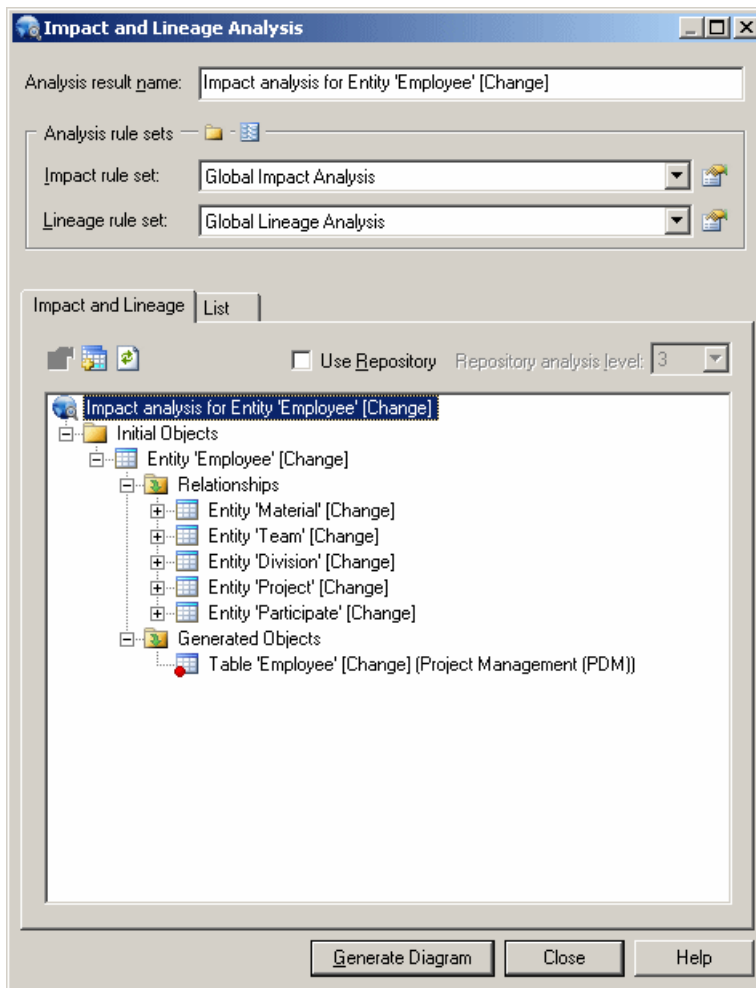
## Obtaining Cross-Model Dependencies Without a Repository Connection

---

If you anticipate needing to obtain information about cross-model dependencies with models not in your workspace in a situation where you will not have a repository connection, you can obtain this information in advance by checking your model out with the **Check out dependencies** option.

For models checked out with the **Check out dependencies** option (see *Checkout Parameters* on page 315) objects that are implicated in an impact or lineage analysis but that are not currently available display a red overlay in their bottom-left corner to indicate that the analysis cannot proceed beyond this point without connecting to the repository or otherwise obtaining the parent model. This option also ensures the cross-model dependencies appear on the **Dependencies** tab of objects even when the other models are not open in the workspace.

In the following example, the `Employee` table, which is generated from the `Employee` entity, is present in the analysis even though its model is not available, because the model from which the analysis was launched was checked out with dependencies:

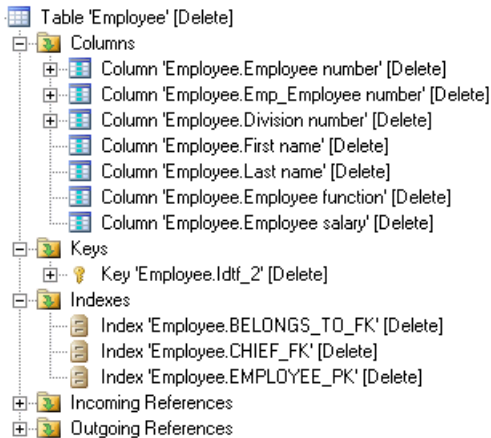


## Analysis Rule Sets

Impact and lineage analysis uses sets of analysis rules derived from relationships between metaclasses in the metamodel to construct the trees of impacted and lineage objects. PowerDesigner provides standard rule sets (XML resource files with a `.rul` extension), and you can create your own.

Each rule represents a potential collection of objects, and is represented as a folder in the analysis tree. In the following example, deleting the `Employee` table also deletes all the members of the `Columns`, `Keys`, `Indexes`, and `Incoming and Outgoing References` collections:

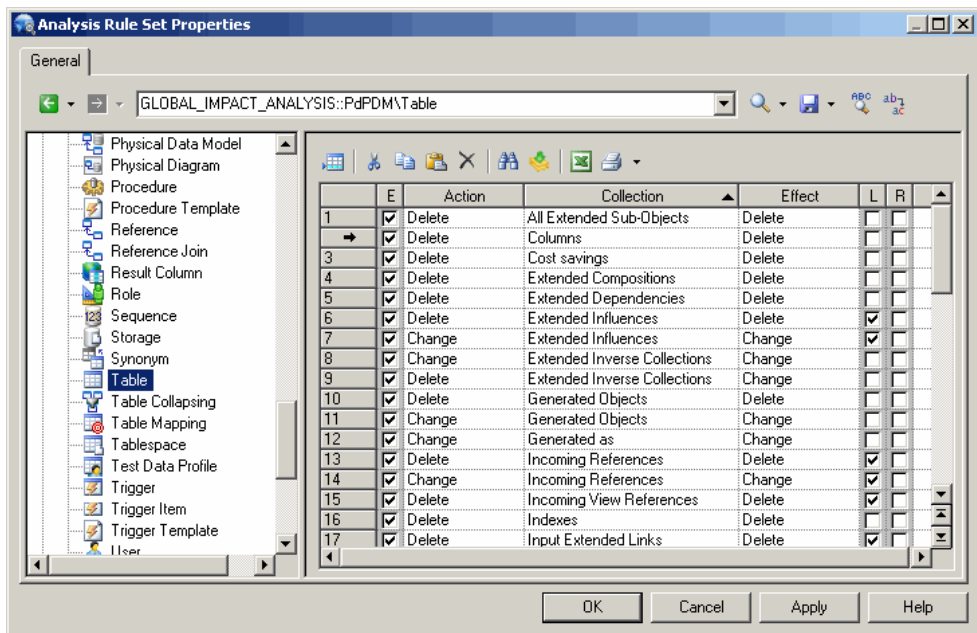




You can open an analysis rule set in any of the following ways:

- From an analysis preview, click the **Properties** tool next to the rule set.
- From an IAM, select **Tools > Change Analysis Options**, and click the **Properties** tool next to the rule set.
- From any model, select **Tools > Resources > Impact and Lineage Analysis Rule Sets**, select an available rule set, and click the **Properties** tool. For information about the tools available in resource file lists, see *PowerDesigner Resource Files* on page 272.

Analysis rule sets contain a list of analysis rules for each metaclass in the PowerDesigner metamodel. All analysis rule set files have the same basic category structure, with a library for each model type containing the metaclasses of that module. Clicking a metaclass displays the rules associated with that metaclass:



The following properties are available for each analysis rule:

Property	Description
E	Enables the rule for use in the analysis.
Action	Specifies the action performed on the metaclass that triggers the application of the rule. Select an action from the list or enter your own (see <i>Creating a User-Defined Action</i> on page 515). For lineage analysis rules, <code>Lineage</code> is the only possible value.
Collection	Specifies the metaclass collection whose members the rule is applied to. Collections defined in extensions (see <i>Customizing and Extending PowerDesigner &gt; Extension Files</i> ) are included in one of the <code>Extended . . .</code> collections.
Effect	Specifies the effect on the objects in the collection caused by the action on the metaclass. Select an action from the list or enter your own (see <i>Creating a User-Defined Action</i> on page 515). For lineage analysis rules, <code>Lineage</code> is the only possible value.
L	Replace Link Object by Extremity - Simplifies the preview tree and the IAM Browser and diagram by hiding the link and showing only the object at the other end of the link.
R	Recursive - Propagates the effect recursively to the dependent objects of the objects in the collection.

The root node of each file contains the following properties:

Property	Description
Name/Code/ Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
File name / Type	[read-only] Specify the path to the <code>.rul</code> file and the type of the rule set (impact or lineage).

## Creating an Analysis Rule Set

You can create your own rule sets, which are then available from the List of Impact and Lineage Analysis Rule Sets.

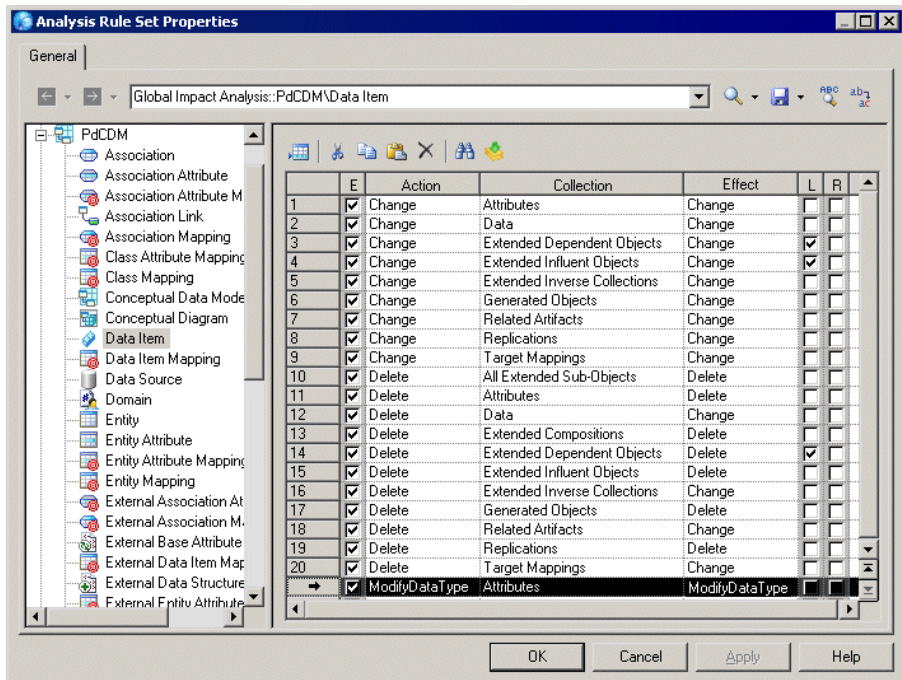
1. Select **Tools > Resources > Impact and Lineage Analysis Rule Sets** to open the List of Impact and Lineage Analysis Rule Sets, which shows all the available rule sets.
2. Click the **New** tool, enter an appropriate name for the rule set, and select the appropriate type of rule set.
3. Select a rule set from the **Copy From** list to create a new rule set that is identical to the original set apart from the name.
4. Click **OK** to open a Save As dialog, enter a file name and then click **OK** to open the new rule set in the Resource Editor.

## Creating a User-Defined Action

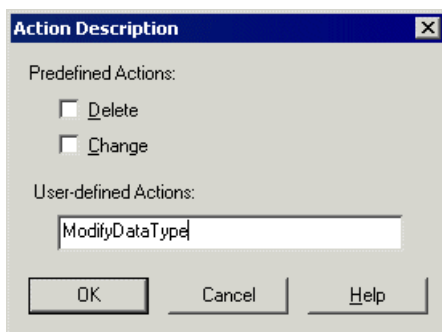
You can specify a user-defined action on an object to analyze its consequences. You must already have created the appropriate analysis rule in the Resource Editor.

In the following example, create an impact analysis rule to specify that a `ModifyDataType` action on the `Data Item` metaclass will also change its attributes.

1. In the Resource Editor, open an impact analysis rule set (see *Analysis Rule Sets* on page 512).
2. Click the `PdCDM` library to expand its available metaclasses tree.
3. From the tree, select `Data Item` and create the appropriate rule by specifying the following options:
  - **Action** – enter `ModifyDataType`, which specifies the action on the data item, and triggers the impact analysis rule. The **Enable** check box is automatically selected.
  - **Collection** – select `Attributes`, which specifies the metaclass collection for which you define the impact rule.
  - **Effect** – enter `ModifyDataType`, which specifies the action that is propagated to attributes.



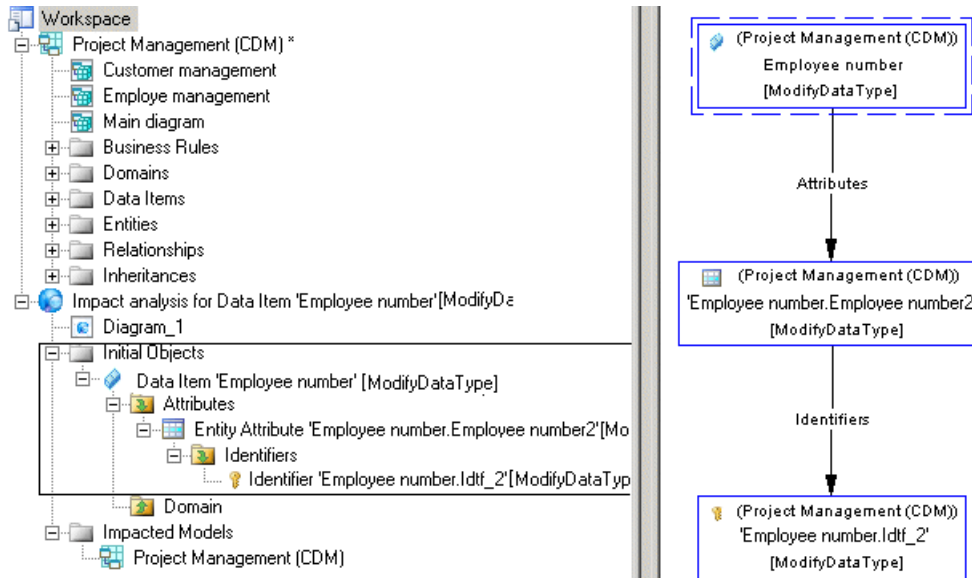
4. Click **OK** to save the rule set and close the Resource Editor.
5. Open the Action Description dialog:
  - [from preview] Right-click a data item in the tree, and select **Change Action Description**.
  - [from the IAM] Right-click a data item in the Browser or in the diagram, and select **Change Action Description**.
6. Enter `ModifyDataType` in the User-defined Actions field:



You can enter several actions in a single word using semicolons as separators.

7. Click **OK** to close the dialog box.

The following example shows how the [ModifyDataType] action on the Employee number data item affects its Employee number2 attribute, which in turns affects its Idtf\_2 identifier:



## Checking Rule Sets into the Repository

When an administrator creates or upgrades the repository, default rules sets are checked into the Library folder at the root of the repository to enable impact and lineage analyses in the **Repository** tab of the Browser. To use other rule sets to perform analyses in the repository, you must check them in manually.

**Note:** If you have stored customized rule sets delivered with a previous version of PowerDesigner in the repository, they cannot be used for repository analyses until you have upgraded them by re-checking them into the latest version of the repository. For general information about updating resource files, see *Installation Guide > Planning Your PowerDesigner Installation > Upgrading PowerDesigner*.

1. Select **Tools > Resources > Impact and Lineage Analysis Rule Sets** and create your custom rule set (see *Creating an Analysis Rule Set* on page 515).
2. Select the rule set in the list and click the **Check In** tool.
3. In the Check In Document dialog (see *Check-In Parameters* on page 297), select the **Folder** to which you want to check in the rule set.

You can check rule sets into any folder for which you have write permission. For example, you might want to create custom rule sets for a particular project and check them into that project's folder.

4. Click **OK** to complete the check in.

The rule set is now available for use in the repository. If you have checked your rule set into a folder that did not previously contain rule sets, you must use the **Select Path** tool to make your rule set available in the analysis dialog (see *Impact and Lineage Analysis in the Repository* on page 331).

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**Note:** All impact and lineage analyses launched from your local workspace, even those that use the repository, are performed with your local rule sets.

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### Repository Rule Set Limitations

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While the majority of rules are supported in analyses launched or extended into the repository, many calculated collections and some other collections are not accessible to the repository analysis engine. In addition, shortcuts which point to a different branched folder may not be immediately available.

The following list indicates the main categories of collections that are not supported in the repository:

- All collections involving symbols. For example, Symbols, Objects in Related Diagrams.
- In the EAM, calculated collections based on application link types. For example, Implement Objects, Implemented By Objects, Produce Objects, Produced By Objects, Use Objects, Used By Objects.
- In the EAM, the Responsible For collection, which lists the objects for which people or organization units are responsible.
- In the OOM, calculated collections based on generalization or realization links or navigable roles. For example, Implemented Operations, Inherited Associations, Inherited Attributes, Inherited Operations, Navigable Associations.
- In the OOM, the Operations collection for the component metaclass.
- In the CDM, Barker notation, the SubEntities and SuperEntities collections.
- In the BPM for BPMN 2.0 the Participants collection for the choreography task metaclass.

Where one model in a branched folder contains a shortcut to a model in a different branched folder in another part of the repository tree, the shortcut may not be followed during an analysis if the shortcut is the first link between the models and the referencing model is checked in before the target model. In such a situation, checking out both the model containing the shortcut and the target model and checking them back in will enable PowerDesigner to follow the shortcut correctly.

## PART IV

# Administering PowerDesigner

The chapters in this part explain the tools available for administering the PowerDesigner environment through the repository.

For information about creating, upgrading, and troubleshooting a repository, see *Installation Guide > Installing the Repository*.





## CHAPTER 18      **Controlling Repository Access**

The repository administrator is responsible for controlling access to the documents stored in the repository by creating users and groups and assigning them rights, permissions, and profiles. The administrator may connect PowerDesigner to an LDAP server for authentication, an SMTP server for automating notifications, and specify a policy to control the strength and duration of passwords.

Repository rights give users access to general repository features, while permissions give them access to particular locations in the repository. The following rights and permissions are available:

<b>Rights (Entire Repository)</b>	<b>Permissions (Per Folder or Item)</b>
<ul style="list-style-type: none"><li>• <b>Connect</b> - Connect to the repository.</li><li>• <b>Freeze Versions</b> - (see <i>Freezing and Unfreezing Document Versions</i> on page 320).</li><li>• <b>Lock Versions</b> - (see <i>Locking and Unlocking Document Versions</i> on page 321).</li><li>• <b>Manage Branches</b> - (see <i>Branching Version Trees</i> on page 325).</li><li>• <b>Manage Configurations</b> - (see <i>Grouping Document Versions in a Configuration</i> on page 322).</li><li>• <b>Manage All Documents</b> - Perform any action on any document version. Implicitly includes <b>Full</b> permission on all repository documents.</li><li>• <b>Manage Users</b> - Create, modify, and delete repository users and groups, grant them rights, and add them to groups.</li><li>• <b>Manage Repository</b> - Create, upgrade, and delete the repository database.</li></ul>	<ul style="list-style-type: none"><li>• <b>List</b> - View the document or folder in the browser and in search results, and open property sheets. Without this permission, users cannot even see the item.</li><li>• <b>Read</b> - Also compare documents, and check documents out from the repository.</li><li>• <b>Submit</b> - Also check the document into a changelist for review by a user with <b>Write</b> permission.</li><li>• <b>Write</b> - Also check in (with or without a changelist), freeze, and lock document versions.</li><li>• <b>Full</b> - Also manage permissions granted to users or groups and remove locks on documents.</li></ul>

1. [optional] Connect the repository to an LDAP server to manage user access (see *Connecting to an LDAP Server for User Authentication* on page 524).
2. [recommended] Connect PowerDesigner to an SMTP server to enable the automatic sending of emails for passwords, changelist submissions, and other notifications (see *Connecting to an SMTP Server for Notifications* on page 527).

3. If some or all your users will not be managed by LDAP, specify an appropriate password policy (see *Defining a Password Policy* on page 528).
4. Create high-level functional groups (see *Creating Repository Groups* on page 531) to organize users by type and assign appropriate rights to them to govern general actions that they can perform in the repository (see *Granting Rights to Users and Groups* on page 533).

For example:

Groups	Rights
Administrators	Connect, Manage All Documents, Manage Users, Manage Repository
Senior Architects	Connect, Freeze Versions, Lock Versions, Manage Branches, Manage Configurations
Architects	Connect, Freeze Versions, Lock Versions
Business Analysts	Connect, Freeze Versions, Lock Versions
Stakeholders	Connect (to provide read-only access via the PowerDesigner Portal).

**Note:** There is no requirement to create groups - you can assign rights and permissions to individual users - but we recommend that in all but the smallest deployments, you do create groups to simplify the process.

5. [optional] Use the supplied profiles or develop others and apply them to your groups as necessary to filter the PowerDesigner interface to hide or render read-only types of models, objects, and properties, and to specify defaults for interface elements, options and preferences for different kinds of users (see *Using Profiles to Control the PowerDesigner Interface* on page 560).

In our example, business analysts need only contribute to requirement models, enterprise architecture models, and conceptual data models and all other types of models are hidden from them. We could imagine dividing the Architects group into subgroups such as enterprise architect and information architect and hiding or rendering read-only models that do not concern them.

6. Create an appropriate folder structure in the repository (see *Repository Folders* on page 288) to enable you to group documents by project or in any other appropriate way, and to simplify the granting of permissions.

In the example, the team will use the library folder to share reference models and other documents, and to push targets, extensions, and other resource files to users (see *Deploying an Enterprise Library* on page 549). In addition, two modeling projects are proposed, and all the documents related to them will be kept in the two top-level folders.

7. Determine your review policy either at a global or project by project level. PowerDesigner supports the following kinds of policy:

- Simple review - Change lists submitted by users with the `Submit` permission are reviewed by a single user with the `Write` or `Full` permission.
  - Peer review - Users with the `Write` or `Full` permission voluntarily submit change lists for review.
  - Direct check in - The `Submit` permission and change lists are not used, and users all check in changes without review.
8. Create development groups and implement your review policies by assigning appropriate permissions to control what actions users and groups can perform on particular repository documents and folders such as your library, glossary model, and modeling projects.

In the example, we propose:

- A Compliance Committee who can modify the reference models and shared resource files contained in the library and can submit changelists for inclusion in the glossary model.
- A Terminology Committee who can modify the glossary model.
- For each project, lead architects are able to check in changes to the project (and submit changelists for inclusion in the glossary), and regular architects can submit changelists to the project.
- A cross-project stakeholder groups with read-only access (though we could imagine sub-folders within each project for which these users would have write or submit permission for storing their own documents).

Group	Library	Glossary Model	Project A	Project B
Administrators	Full	Full	Full	Full
Compliance Committee	Write	Submit	Read	Read
Terminology Committee	Read	Write	Read	Read
Project A Leads	Submit	Submit	Write	Read
Project A Team	Read	Read	Submit	Read
Project B Leads	Submit	Submit	Read	Write
Project B Team	Read	Read	Read	Submit
Business Stakeholders	Read	Read	Read	Read

9. Create as many users as necessary either manually (see *Creating Repository Users* on page 529) or via LDAP (see *Creating Repository Users Managed by LDAP* on page 530) and assign them to appropriate groups (see *Adding Users and Groups to a Group* on page 532) according to their roles and project responsibilities.

There is no limit to the number of groups to which a user or group can be assigned, and users benefit from the cumulative total of all the rights and permissions they receive. In our

example, if a business stakeholder is also a member of the Terminology Committee group, then she will have `Write` permission on the glossary model.

### Connecting to an LDAP Server for User Authentication

A repository administrator can delegate the authentication of repository users to an LDAP server. PowerDesigner supports authentication via Active Directory and a number of other LDAP implementations. You can optionally allow automatic creation of repository accounts when an LDAP user connects to the repository for the first time.

**Note:** PowerDesigner LDAP integration provides only authentication. Authorization is still managed via the rights and permissions granted within the repository environment.

1. Connect to the repository and select **Repository > Administration > LDAP Parameters** (or right-click the root node, and select **Properties** to open the repository property sheet, and then click the **LDAP** tab).
2. Select the appropriate **Server type** from the list to set default values for the other parameters.

For Active Directory, if your environment supports anonymous binding, you may be able to connect without further configuration. Click the **Test Connection** button and follow the instructions on the dialog. If your connection succeeds then consider enabling the **Use Secure Socket Layer (SSL)** and **Auto-create user accounts in repository** options and go directly to step 6.

3. Modify any appropriate parameters in the **General** group box:

Parameter	Description
Server type	<p>Specifies the type of the LDAP server and sets default values for the server. The following types are available:</p> <ul style="list-style-type: none"> <li>• Active Directory - if your environment supports anonymous binding, you may be able to connect without further configuration. Click the <b>Test Connection</b> button and follow the instructions on the dialog.</li> <li>• Netscape Directory Server</li> <li>• OpenLDAP</li> <li>• Oracle Directory Server</li> <li>• Other</li> </ul> <p>If you edit any parameters and want to revert to the defaults, click the <b>Default Settings</b> button.</p>

Parameter	Description
Provider URL	<p>Specifies the URL for the LDAP provider. By default, for Active Directory, PowerDesigner will automatically detect the nearest LDAP server and use this for authentication, initializing this field to:</p> <pre>LDAP://_ldap.domain:389</pre> <p>For other servers, this field is initialized to:</p> <pre>LDAP://ldap.domain:389</pre> <p>and you should replace <code>ldap</code> with the name or IP address of your LDAP server.</p>
Use Secure Socket Layer (SSL)	<p>Instructs PowerDesigner to connect to the LDAP server using SSL, changing the LDAP provider port to the standard secure 636. If you have deployed the PowerDesigner Portal, you must obtain and register a certificate authority certificate in the Java installation (see <i>Importing an LDAPS Certificate for the PowerDesigner Portal</i> on page 360).</p> <p><b>Note:</b> In most corporate environments using Active Directory, the necessary certificate is already registered on client machines. If this is not the case, or for other LDAPS servers, users installing PowerDesigner will need to contact their administrator to obtain a certificate and use <code>\Windows\System32\certmgr.msc</code> to register it. Right-click <b>Trusted Root Certification Authorities</b> and select <b>All Tasks &gt; Import</b>, then follow the wizard instructions.</p>
Default search base	<p>Specifies the level at which the query begins its search for users in the LDAP tree. By default this is initialized to the domain components (DCs) of the LDAP server. For example:</p> <pre>dc=sybase, dc=com</pre> <p>You could include the location of the User directory such as <code>OU=Users, dc=devpd, dc=local</code>. If the location of the User directory is not specified here, then you must include it in the <b>Authentication Search Base</b>.</p>
Anonymous bind	<p>[default] Specifies that the LDAP server supports anonymous access. If you deselect this parameter, you must specify a bind user distinguished name (DN) and password for an account that has permissions to query the LDAP server.</p> <p><b>Note:</b> If the Bind user DN is in the same DN as the <b>Authentication search base</b> then you can simply enter the user id for the search. Otherwise, you must enter the full DN for that account. For example, if the <b>Default search base</b> is <code>ou=people, dc=Onebridge, dc=qa</code>, and you have a user <code>cn=csitest, cn=users, dc=Onebridge, dc=qa</code>, then the Bind DN must be <code>cn=csitest, cn=users, dc=Onebridge, dc=qa</code>.</p>

Parameter	Description
Auto-create user accounts in repository	Specifies that any users corresponding to the LDAP authentication search filter can connect to the repository, and will have an account created for them in the repository when they do so. If you do not select this option, then an administrator must create an account for each user before they can connect.

4. Modify any appropriate parameters in the **Authentication** group box:

Parameter	Description
Search filter	<p>Specifies the LDAP query that selects users for authentication. By default this is initialized to (for Active Directory):</p> <pre>(&amp;(objectClass=person)(userPrincipalName={uid}))</pre> <p>and for other servers:</p> <pre>(&amp;(objectClass=person)(cn={uid}))</pre> <p>To determine an alternative filter, you must know the properties of the users defined in the Active Directory, and which property (for example, name or samAccountName) is being used as the login name.</p>
Search base	<p>Specifies the location of the User list in your LDAP server. By default this is initialized to the same value as the <b>Default search base</b>. If the default search base does not include your users you must specify an appropriate search base here. Users may be in a common node such as cn=Users or an organization unit such as OU=Users. To determine the correct search base, you should use an LDAP browser to look at the full distinguished name of a user. Note that your Bind DN may be a user in a different node in the tree than general users so it is very important that you have the correct information for each.</p>
Search scope	<p>Specifies the scope of the authentication search. You can choose between:</p> <ul style="list-style-type: none"> <li>• subtree - [default] the search begins at the level of the Search base and also searches any subnodes.</li> <li>• onelevel - only the level specified in the the Search base is searched</li> </ul>
Authentication method	<p>Specifies the method to use for authentication requests. You can choose between:</p> <ul style="list-style-type: none"> <li>• simple - [default] clear text authentication. If SSL is enabled, then the password will be encrypted.</li> <li>• DIGEST-MD5 - hashed password authentication. If you select this option, you must specify a digest format.</li> </ul>

5. Click the **Test Connection** button and follow the instructions on the dialog to verify your connection.
6. Click **OK** to save your changes.

If you have not selected the **Auto-create user accounts in repository** option, you must create repository accounts for each user that you want to be able to connect.

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**Note:** Even if you select this option, we recommend that you create appropriate user accounts in advance in order to grant appropriate rights and permissions on your various repository folders and documents. By default, LDAP users connecting to the repository are added to the `External users` and `All users` groups, and are limited to read access on the repository.

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## Connecting to an SMTP Server for Notifications

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The repository administrator can automate the sending of emails for passwords, changelist submissions, and other notifications to users by specifying an SMTP server for PowerDesigner to use.

If an SMTP server is not specified, the administrator must distribute passwords manually and notifications related to change lists cannot be sent. The SMTP server can also be used to send change notifications from the PowerDesigner Portal (see *Subscribing to Change Notifications* on page 340).

1. Connect to the repository and select **Repository > Administration > SMTP Parameters** (or right-click the root node, and select **Properties** to open the repository property sheet, and then click the **SMTP** tab).
2. Enter appropriate values for each of the following settings:

Setting	Description
SMTP host	Specifies the host name of the SMTP server used to send mail.
SMTP port	Specifies the port number of the SMTP server used to send mail.
Sender's email address	Specifies the email address from which to send mails.
Use Secure Socket Layer (SSL)	Specifies to connect to the SMTP mail server through SSL.
Server requires authentication	Specifies that the SMTP server requires authentication. If you select this option, then you must specify an SMTP account and password, and can instruct PowerDesigner to use Secure Password Authentication (SPA).

3. Click the **Test** button to send a test email to the sender's email address.
4. Click **OK** to save your changes.

## Defining a Password Policy

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The repository administrator is responsible for defining a password policy to ensure that passwords are sufficiently secure and are changed at appropriate intervals. The password policy governs only users who are not managed by LDAP.

1. Connect to the repository and select **Repository > Administration > Password Policy** (or right-click the root node, and select **Properties** to open the repository property sheet, and then click the **Passwords** tab).
2. Select policy settings as appropriate:

Setting	Description
Password length	Specifies the minimum and maximum permitted length of passwords. This option cannot be disabled. The minimum minimum length for a password is 6 characters.
Password must contain	Specifies that passwords must contain at least one of each of the character types selected.
Disallow reuse of previous $x$ passwords	Prevents users from reusing the specified number of old passwords.
Enforce changing of passwords after $x$ days	Requires that users change their passwords after the specified number of days.
Block inactive users after $x$ days without connection	Blocks users if they try to log in after the specified number of days of inactivity.
Temporarily block users for $x$ minutes after $y$ failures to log in	Blocks users for the specified number of minutes if they submit an invalid combination of username and password the specified number of times.
Temporary passwords issued by an administrator are valid for $x$ days	Specifies the period for which temporary passwords (which are issued when a user is created or unblocked) are valid. Users attempting to use a temporary password after this time will be blocked.

3. Click **OK** to save your changes.

Changes made to the policy take effect immediately. If your policy becomes more restrictive, users whose passwords are no longer compliant will be instructed to change their password when next they connect.



## Creating Repository Users

The repository administrator is responsible for creating user accounts to enable users to connect to the repository and access the content that they need.

When you create the PowerDesigner repository, the user **ADMIN** is created by default, with all available rights on everything in the repository. This user is responsible for creating other users and groups as necessary either in the repository or through an external LDAP server (see *Connecting to an LDAP Server for User Authentication* on page 524) and granting permissions on the contents of the repository (see *Granting Access Permissions on Repository Items* on page 534).

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**Note:** The repository has separate groups and users from the DBMS.

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1. Select **Repository > Administration > Users** to open the List of Users and click the **Add a Row** tool.
2. Enter a name in the **Login Name** column and click the **Properties** button to open the property sheet of the user.
3. If you have enabled user authentication via LDAP, select the **External (managed by LDAP)** check box, and click the **Check Name** button to verify the login name and auto-fill the remaining fields. Otherwise, manually enter an email address, and any other appropriate properties.

The following properties are on the **General** tab:

Property	Description
Login Name	Specifies the name used for logging in to the repository.
External (managed by LDAP)	Specifies that authentication of the user is handled by an LDAP server (see <i>Connecting to an LDAP Server for User Authentication</i> on page 524). Click the <b>Check Name</b> button to verify the login name in the LDAP server and to auto-fill the remaining fields. Selecting this check box disables the <b>Full name</b> and <b>Email</b> fields.
Full Name	Specifies the real name of the user.
Email	Specifies the email address of the user. If you have specified an SMTP server (see <i>Connecting to an SMTP Server for Notifications</i> on page 527) this address will be used to send the password.
Comment	Specifies any additional information about the user.

Property	Description
Status	<p>Specifies the status of the user, which can be one of:</p> <ul style="list-style-type: none"> <li>• Active - the user can access the repository.</li> <li>• Blocked - the user has violated one of the rules of the password policy (see <i>Defining a Password Policy</i> on page 528), and cannot access the repository until an administrator unblocks her account (see <i>Unblocking Blocked Users</i> on page 536).</li> <li>• Inactive - the user is no longer active in the repository (see <i>Deactivating Users</i> on page 536) and may not connect. The user remains in the List of Users and can be reactivated at any time.</li> </ul>

4. If you have not enabled delivery of passwords by email (see *Connecting to an SMTP Server for Notifications* on page 527), click the **Reset Password** button and then select the **Show** checkbox to display the password and note it for transmission to the user.
5. Click the **Groups** tab and add the user to any appropriate groups (see *Adding Users and Groups to a Group* on page 532).

By default, all users are added to the `Public` group, from which they inherit the `Read` permission on all the contents of the repository (see *Granting Access Permissions on Repository Items* on page 534).

6. Click the **Rights** tab and specify any appropriate rights for the user (see *Granting Rights to Users and Groups* on page 533). By default, all users are granted the `Connect` right, which entitles them to connect to the repository.
7. Click the **Profiles** tab and associate the user with appropriate object permissions, UI, and general preferences profiles (see *Applying Profiles to Users and Groups* on page 566).
8. Click **OK** to complete the creation of the user. If an SMTP server is configured, the password will be sent to the user at the recorded email address.

Users must log in with their temporary password before the delay specified in the password policy (see *Defining a Password Policy* on page 528). When they first log in they will be required to change the temporary password.

## Creating Repository Users Managed by LDAP

If you have not selected the **Auto-create user accounts in repository** option, you must create repository accounts for each user that you want to be able to connect. Even if you select this option, we recommend that you create appropriate user accounts in advance in order to grant appropriate rights and permissions on your various repository folders and documents.

1. Select **Repository > Administration > Users** to open the List of Users and click the **Add a Row** tool.
2. Enter a name in the **Login Name** column and click the **Properties** button to open the property sheet of the user.

3. Select the **External (managed by LDAP)** check box, and click the **Check Name** button to verify the login name and auto-fill the remaining fields, which are set, with the exception of **Comment**, to read-only.
4. Click the **Groups** tab and add the user to any appropriate groups.  
By default, all LDAP users are added to the `External` and `Public` groups, from which they inherit the `Read` permission on all the contents of the repository.
5. Click the **Rights** tab and specify any appropriate rights for the user. By default, all users are granted only the `Connect` right, which entitles them to connect to the repository.
6. Click the **Profiles** tab and associate the user with appropriate object permissions, UI, and general preferences profiles.
7. Click **OK** to complete the creation of the user.

## Creating Repository Groups

---

The repository administrator is responsible for creating groups of users in the repository. Users are added to groups in order to simplify the granting of rights and permissions and the use of profiles. You can create hierarchies of groups. For example, you could insert the `Designers`, `Quality Assurance`, and `Documentation` groups into the `R&D` group, to which you assign permissions to documents that all these groups must use.

When you create the `PowerDesigner` repository, the following groups are created by default:

- Administrators, [ADMN] - has all available rights.
- All users [PUBLIC] - has the `Connect` right and `Read` permission on the repository root (see *Granting Access Permissions on Repository Items* on page 534). All users belong to this group and can thus connect to the repository and check out any document.
- External users [EXTERNAL] - has the `Connect` right. Remote LDAP users (see *Connecting to an LDAP Server for User Authentication* on page 524) are automatically added to this group when they connect for the first time.

1. Select **Repository > Administration > Groups** to open the List of Groups.
2. Click the **Add a Row** tool and enter a name for the group.
3. Click the **Properties** tool to open the property sheet of the new group. The following properties are available on the **General** tab:

Property	Description
Name/Code/ Comment	Identify the object. The name should clearly convey the object's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the object. By default the code is generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.

4. Click the **Members** tab and add any appropriate users and groups to the group (see *Adding Users and Groups to a Group* on page 532).
5. Click the **Parent Groups** tab and add the group to any appropriate groups (see *Adding Users and Groups to a Group* on page 532).
6. Click the **Rights** tab and specify any appropriate rights for the group (see *Granting Rights to Users and Groups* on page 533). By default, groups do not have any rights.
7. Click the **Profiles** tab and associate the group with an appropriate object permissions, UI, and general preferences profile (see *Applying Profiles to Users and Groups* on page 566).
8. Click **OK** to complete the creation of the group.

## **Adding Users and Groups to a Group**

You can add users and groups as members of a group from either the user or the group property sheet.

There are three ways to add members to a group:

- To add a user to a group from the user's property sheet, select the **Groups** tab, which lists the groups to which the user belongs. Click the **Add Groups** tool to open a list of groups, select one or more, and then click **OK** to add the user to them.

---

**Note:** Click the **Show All Parent Groups** tool to show all the parent groups of the groups of which the user is a member, and from which she may inherit additional rights, permissions, and profiles.

---

- To add a group to a parent group from the child group's property sheet, select the **Parent Groups** tab, which lists the groups to which the group belongs. Click the **Add Groups** tool to open a list of groups, select one or more, and then click **OK** to add the group to them.
- To add a user or group to a group from the parent group's property sheet, select the **Members** tab, which lists the users and groups which are members of the group. Click the **Add** tool to open a dialog with lists of users and groups on sub-tabs, select one or more, and then click **OK** to add them to the group.

---

**Note:** Click the **Show All Children Members** tool to show all the groups and users that belong to the members of the group, and who will inherit rights, permissions, and profiles assigned to the group.

---

## Deleting a Group

When you delete a group from the repository you do not delete the members (either users or groups) of the group.

1. Select **Repository > Administration > Groups** to open the List of Groups.
2. Select a group in the list and click the **Delete** tool. The group is removed from the list, and:
  - Any document permissions granted to the group are revoked.
  - Any members of the group lose whatever rights or permissions they had inherited from the group.
  - The group is removed from membership of any groups to which it belonged.
3. Click **OK** to close the List of Groups.

## Granting Rights to Users and Groups

A new user has only the `Connect` right assigned by default and belongs only to the `PUBLIC` group, which has no rights. In order for the user to be able to do anything, the repository administrator must grant rights to her either directly or by adding her to other groups.

For examples of combining rights to define roles, see *Chapter 18, Controlling Repository Access* on page 521.

---

**Note:** The rights a user or group receive when they become members of a group (see *Adding Users and Groups to a Group* on page 532) are cumulative. For example, a user with the `Manage Branches` right will not lose this right when he becomes a member of a group that has only the `Freeze Versions` and `Lock Versions` rights.

---

1. Select **Repository > Administration > Users** (or **Repository > Administration > Groups**), select the appropriate user or group in the list, and click the **Properties** tool.
2. Click the **Rights** tab and select the check boxes corresponding to the rights you want to assign. The following rights are available:
  - `Connect` - Connect to the repository.
  - `Freeze Versions` - (see *Freezing and Unfreezing Document Versions* on page 320).
  - `Lock Versions` - (see *Locking and Unlocking Document Versions* on page 321).
  - `Manage Branches` - (see *Branching Version Trees* on page 325).
  - `Manage Configurations` - (see *Grouping Document Versions in a Configuration* on page 322).
  - `Manage All Documents` - Perform any action on any document version. Implicitly includes `Full` permission on all repository documents.

- **Manage Users** - Create, modify, and delete repository users and groups, grant them rights, and add them to groups.
  - **Manage Repository** - Create, upgrade, and delete the repository database.
3. Click **OK** to save your changes and close the user property sheet.

---

**Note:** User rights are associated with document permissions (see *Granting Access Permissions on Repository Items* on page 534) to define the actions a user can effectively perform on a document. Some user rights are automatically implied by permissions:

- A user with the **Write** permission on a repository document automatically has the **Lock Versions** and **Freeze Versions** rights for it.
  - A user with the **Full** permission on a document can unlock or unfreeze a version he did not lock or freeze.
- 

### Granting Access Permissions on Repository Items

---

The repository administrator or a user with **Full** permission on a document or folder can grant permissions on it from the **Permissions** tab of its repository property sheet. You can grant permissions on the repository root, folders, PowerDesigner models and model packages, and external application files, but not on individual model diagrams or objects.

In order for a user to check documents out of and into the repository, she must have the following permissions:

- **Check out - Read** permission. When you create a user, she is inserted into the **Public** group, which by default is granted **Read** permission on the repository root.
- **First check in** (to create a document in the repository) or **creating a folder - Write** permission on the target location (the repository root or a folder) or **Submit** to propose the addition.

The user who creates a repository item has, by default, **Full** permission over it, though this permission can be reduced by an administrator. Other permissions are cascaded down from the parent folder or root, so that if another user has **Write** permission on the parent folder, then he will have **Write** permission on the new item.

- **Subsequent check ins** (to update an existing document) - **Read** permission on the target location and **Write** permission on the document (including, for PowerDesigner models, all impacted packages).

---

**Note:** Object permissions should be viewed in conjunction with the rights granted to users or groups (see *Granting Rights to Users and Groups* on page 533). For examples of granting rights and permissions, see *Chapter 18, Controlling Repository Access* on page 521.

---

1. Right-click the item in the Repository Browser, and select **Permissions** to open the item's property sheet at the **Permissions** tab.

---

**Note:** A PowerDesigner project (see *Chapter 3, Projects and Frameworks* on page 47) acts as both a repository document and a folder. Use the project permissions to control working

with the project file itself (project diagram and any framework or dependency matrices) and the folder permissions to grant access to the models contained within the project, as you would for a repository folder.

---

2. Click the **Add** tool to open a list of available users and groups, select one or more, and click **OK** to add them to the list.
3. For each user or group, select the permission you want to grant in the **Granted Permission** column. The following permissions are available:
  - **List** - View the document or folder in the browser and in search results, and open property sheets. Without this permission, users cannot even see the item.
  - **Read** - Also compare documents, and check documents out from the repository.
  - **Submit** - Also check the document into a changelist for review by a user with **Write** permission.
  - **Write** - Also check in (with or without a changelist), freeze, and lock document versions.
  - **Full** - Also manage permissions granted to users or groups and remove locks on documents.
4. [optional] Click the **Copy Permissions to All Children** tool to propagate changes to the item's children.

When you create a folder or check in a model or project, the permissions defined on its parent are propagated to it. However, subsequent changes made to the permissions for the parent are not applied to its children unless you click this tool. For example, if a you grant write permissions to the `Major Project` folder, to the `Development Team 2` group, then they will not automatically be granted write access on its contents.

5. [optional] Click the **Show All Authorized Users** tool to display all the users and groups who have a permission on the item, including those inheriting permissions from groups.

Consult the read-only **Effective Permission** column to see the highest level of permission that each user or group has either directly or via a group. A user who has no directly granted permission on an item may inherit a `Write` permission by virtue of membership in a group, and will appear in the list when the **Show All Authorized Users** tool is pressed.

---

**Note:** If you delete a group from the list while the **Show All Authorized Users** tool is pressed, it and its members remain visible in the list with their granted and effective permissions reduced to `<none>`, until you click **Apply** or **OK**.

---

6. Click **OK** to save your changes.

## Unblocking Blocked Users

---

The repository administrator or a user with the Manage Users right can unblock users blocked for password policy violations.

1. Select **Repository > Administration > Users** to display the List of Users.
2. Select the user in the list and click the **Properties** tool to open his property sheet.
3. Click the **Reset Password** button.
4. If you have not enabled delivery of passwords by email (see *Connecting to an SMTP Server for Notifications* on page 527), select the **Show** checkbox to display the password and note it for transmission to the user.
5. Click **OK** to assign the temporary password to the user. If an SMTP server is configured, the password will be sent to the user at the recorded email address.

Users must log in with their temporary password before the delay specified in the password policy (see *Defining a Password Policy* on page 528). When they first log in they will be required to change the temporary password.

## Deactivating Users

---

The repository administrator or a user with the Manage Users right can deactivate users. An inactive user cannot connect to the repository, but the information about his checkins and other repository actions remains available to other users.

---

**Warning!** A user cannot deactivate himself, even if he has the Manage Users right.

---

1. Select **Repository > Administration > Users** to display the List of Users dialog.
2. Select the user in the list and then select the **[D]eactivate** check box.

The user remains in the list but may no longer connect to the repository. If an inactive user is later reactivated (by deselecting **[D]eactivate**) he will have lost all previous rights, permissions, and group memberships, and will begin with only the Connect right.

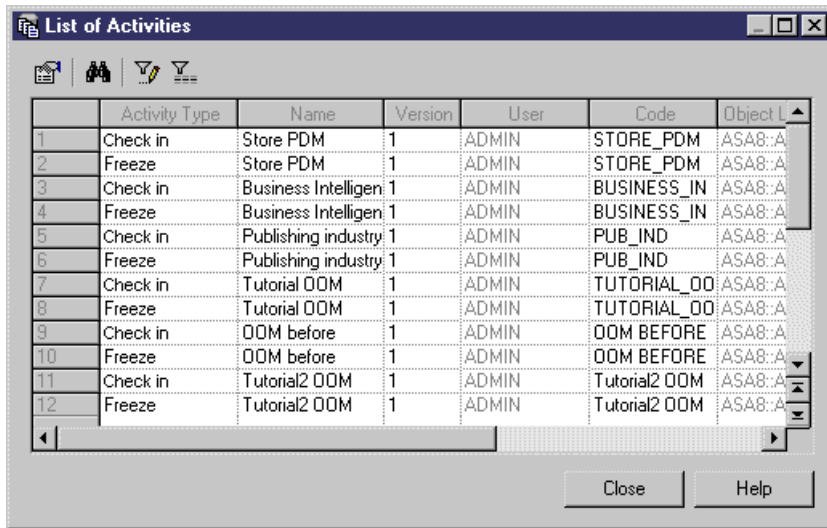
## Auditing Repository Activities

---

Users with the Manage All Documents right can use the List of Activities to audit operations performed on repository documents, analyze user behavior patterns, and highlight activity sequences. Activities are actions that modify repository documents, such as check in, freezing, and deleting.

1. Press Ctrl+Alt+V or select **Repository > Activities** to open the List of Activities:





2. [optional] Click the **Customize Columns and Filter** tool to customize the list. The following columns can be useful for monitoring repository activities:

Column	Description
Activity Type	<p>Specifies the type of action performed on the document:</p> <ul style="list-style-type: none"> <li>Check In - see <i>Checking Documents into the Repository</i> on page 291.</li> <li>Change List Submission / Approval / Rejection / Return for Revision - see <i>Change Lists</i> on page 303</li> <li>Freeze / Unfreeze - see <i>Freezing and Unfreezing Document Versions</i> on page 320.</li> <li>Lock / Unlock - see <i>Locking and Unlocking Document Versions</i> on page 321.</li> <li>Version Deletion / Document Deletion - see <i>Deleting Documents, Document Versions, and Folders</i> on page 334. If a version of the document being deleted is included in a configuration (see <i>Grouping Document Versions in a Configuration</i> on page 322), then though it will no longer be available through the repository Browser, the version will not be deleted from the configuration, and the Document Removal action will be shown.</li> <li>Branch Creation - see <i>Branching Version Trees</i> on page 325.</li> <li>Integration - see <i>Integrating Changes from One Branch to Another</i> on page 328.</li> <li>Document Move - see <i>Moving a Document in the Repository</i> on page 303.</li> <li>Repository Upgrade - see <i>Installation Guide &gt; Installing the Repository &gt; Upgrading the Repository</i>.</li> </ul>

Column	Description
Name/Code	Specify the name and code of the repository document affected.
Location	Specifies the repository folder in which the document is stored.
Comment	Specifies the comment entered to account for the activity.
Version	Specifies the document version number.
Activity Date	Specifies the date when the operation was performed.
User	Specifies the user who performed the operation.

3. [optional] Select an item in the list and click the **Properties** tool to open the property sheet of the affected object. You can use the Versions tab of the property sheet to check out or lock the document version.

## Querying the Repository Using SQL

Administrators can run basic SQL SELECT queries against the repository through the Execute Query window. For more complex queries, you should use your DBMS query editor.

**Note:** You cannot execute SQL queries when connecting to the repository via the repository proxy.

1. Connect to the repository and then select **Repository > Administration > Execute SQL** to open the Execute Query window.
2. Enter one or more SQL queries in the appropriate syntax for your DBMS in the window and click the **Execute** button.

The results of your query are displayed in the Results pane.

## Obtaining Emergency Access to the Repository

In the event that no administrator is able to log in to a running repository, it is possible to create an emergency administrator account to regain access.

1. If the repository proxy is not already in use in your environment, install it on the repository server or a nearby machine for which you are an administrator (see *Installation Guide > Installing the Repository Proxy*).
2. Launch the Repository Proxy Configuration utility (pdproxyconf16.exe).

**Note:** On a Windows 7 machine, you must open the utility by right-clicking its icon or menu item and selecting **Run as administrator**.

3. If an instance is not already available for the repository in question, create one, specifying the appropriate data source, user name, password, and port to connect to the repository database.
4. Select the appropriate instance and click the **Create Emergency User** button to open the Emergency Password dialog, and then select **Show password** to see an automatically generated password, for use with the special `_ADMIN` account.
5. Within 15 minutes, open PowerDesigner and select **Repository > Connect**, select the appropriate repository, enter `_ADMIN` as the login name and the generated password in the Password field and click **OK**.

---

**Note:** If you do not access the repository within 15 minutes, you must repeat the procedure to generate a new temporary password.

---

6. Reset the administrator's password or create a new administrator account as appropriate (see *Creating Repository Users* on page 529).
7. Select **Repository > Disconnect** to disconnect the emergency user from the repository.

---

**Note:** The emergency user is deleted after disconnection.

---



# Deploying an Enterprise Glossary and Library

An administrator can deploy a glossary and a library of enterprise reference models, resource files, and other documents, which will be pushed to and automatically updated for all users. By default, only administrators can edit the glossary or add models to or edit the library. You can provide access to other users using the standard repository permissions.

## Deploying an Enterprise Glossary

---

The *glossary model (GLM)* helps you capture and organize the terminology to be used for naming your model objects. An administrator deploys the glossary, and users enable it in their models to provide autocompletion for object names and model checks to ensure compliance. The glossary appears in the Browser **Glossary** tab and updates are pushed to users each time they connect to the repository, or on demand. Only one glossary is permitted per repository.

For information about using the glossary, see *The Glossary* on page 36.

## Creating Terms, Synonyms, and Related Terms

---

An administrator can define new glossary terms in the **Glossary** tab of the Browser.

**Note:** You can quickly populate the glossary by performing a mass import of terms from a model (see *Importing Terms from a Model* on page 544) or a CSV or Excel file (*Importing Terms from an Excel or CSV File* on page 545), or from the results of the `List of Missing Terms` glossary compliance model check (see *Checking Glossary Compliance* on page 142). You can also add terms in a glossary terms list (see *Glossary Terms Lists* on page 546).

---

1. Select the **Glossary** tab of the Browser, right-click the **Glossary** node, and select **New > Term**.
2. Enter the **Name** and **Code** of the term, which should be approved for use in your organization's models.
3. [optional] Enter a description of the term in the **Comment** field, and a **Reference URL** leading to a site giving further information about the term.

**Term Properties - Sybase Unwired Platform (Sybase\_Unwired\_Platform)**

General | Synonyms | Related Terms | Notes

Name: Sybase Unwired Platform

Code: Sybase\_Unwired\_Platform

Comment: Sybase Unwired Platform is a mobile enterprise application platform that enables enterprise developers to simply and quickly build applications that connect business data to mobile workers on any device, at any time.

Stereotype:

Reference URL: <http://www.sybase.co.uk/products/mobileenterprise/sybaseunwiredplatform>

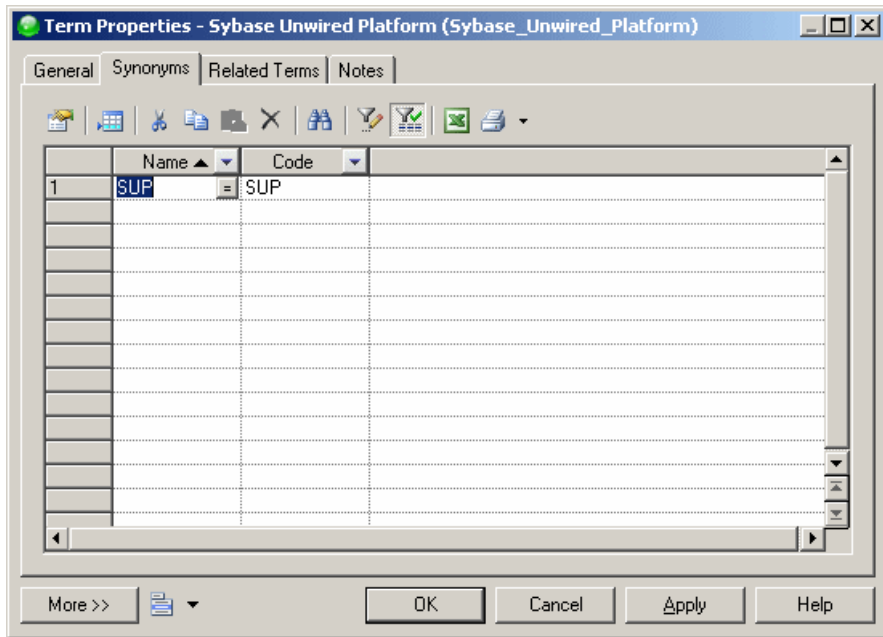
More >> OK Cancel Apply Help

4. [optional] Click the **Synonyms** tab and enter one or more synonyms for the term.

---

**Note:** Synonyms are words that have a similar meaning to the term, but are not approved for use in object names. For example, *Customer* may be specified as a synonym for the approved term *Client*. When naming an object, if a user begins to enter a synonym, the approved term is suggested in the autocompletion list. Modelers can use the **Object name contains synonyms of glossary terms** model check to find and replace synonyms in object names (see *Checking Glossary Compliance* on page 142).

---



5. [optional] Click the **Related Terms** tab and use the **Add Objects** and **Create an Object** tools to associate other terms with the term.

---

**Note:** Related terms are other glossary terms that are in some way associated with the present term. For example, Bank may be entered as a related term for the term *Current Account*.

---



**Note:** Though a repository can only contain one glossary, in multi-repository environments or in other situations where you want to import terms from another glossary file, right-click the **Glossary** node, and select **Import from Another Glossary Model**. Navigate to the glossary file and click **Open** to open the Merge Models dialog (see



*Merging Models* on page 226), which will allow you to review and modify the proposed changes before clicking **OK** to complete the import.

---

### **Importing Terms from an Excel or CSV File**

You can import terms from an Excel or CSV file to quickly populate your glossary.

To simplify the import of terms from an Excel file, we recommend that you create a worksheet called *Term*, with the following format:

<b>Name</b>	<b>Code</b>	<b>Comment</b>	<b>Reference URL</b>	<b>Synonyms</b>	<b>Related Terms</b>	<b>Category</b>
Client	CLIENT	Specifies...	www.diction-ary.com	Customer, User	Account, Invoice	Sales
Supplier	SUPPLIER	Specifies...	www.diction-ary.com	Provider, Seller	Account, Invoice	Purchasing
etc	etc	etc	etc	etc	etc	etc

Using these exact column headings allows the Excel import to automatically recognize them as the appropriate properties. Only the Name column is required. You can enter multiple values in a column by separating them with commas.

1. Right-click the **Glossary** node, and select **Import from Excel File** to open the Excel Import wizard.
2. Click the **Options** button to open the Import Options dialog, select **Auto-map columns to properties**, and click **OK** to return to the wizard.
3. Click the **Select File** button, navigate to and select the file you want to import, and click **OK** to return to the wizard.
4. Click **Next** to begin the wizard. If you have named your columns as suggested above, the wizard recognizes and imports the terms and all their properties without further input from you.

---

**Note:** For detailed information about the PowerDesigner Excel Import Wizard, see *Importing Objects from Excel Files* on page 91.

---

## **Organizing Terms in Categories**

You can organize terms in the glossary by placing them in categories. You can create categories under the root or under other categories, and drag and drop terms and categories to move them between categories.

To create a category, right-click the glossary root or a category and select **New > Category**, or use the tools on the **Categories** tab of a category property sheet.

To add terms to a category, drag and drop them onto the category node in the Browser or use the **Add** and **Create** tools on the **Terms** tab of the category property sheet.

**Warning!** If you delete a category, you also delete any categories and terms that it contains.

## Adding Other Views and Objects to, and Extending the Glossary

Although the Glossary's primary purpose is to manage enterprise terminology, you can also add business rules and create reports on glossary objects. You can create lists and dependency matrices to display the glossary terms and their relationships with other objects. You can also extend the glossary using all the standard extension mechanisms including adding new properties to glossary terms and creating new types of objects.





These features are available from the glossary contextual menu. Right-click the glossary and select **New >**:













- **Glossary Terms List** - to create a terms list in the canvas (see *Glossary Terms Lists* on page 546).
- **Dependency Matrix** - to create a dependency matrix (see *Dependency Matrices* on page 180).
- **Business Rule** - to create a business rule (see *Business Rules* on page 131).
- **Report** - to create a report on the glossary (see *Chapter 12, Reports* on page 363).
- **List Report** - to create a list report on terms or other glossary objects (see *Creating a List Report* on page 370).
- **Extension** - to add an extension file (see *Extension Files* on page 275) to the glossary to allow you to extend glossary objects or define new extended objects. You can also add extended attributes to a glossary term, synonym, or related term directly from its property sheet using the standard mechanism (see *Adding New Properties to an Object* on page 154)

## Glossary Terms Lists

You can create glossary terms lists to help users browse the glossary and to simplify glossary editing. You can create terms directly in a list and define custom filters for each list. To create a list, right-click the Glossary node and select **New > Glossary Terms List**.

The following tools are available on the glossary terms list toolbar:

Tools	Description
	<b>Properties [Alt+Enter]</b> - Opens the property sheet of the selected term.
	<b>Add a Row [Ctrl+N]</b> - Create a new term.
	<b>Show Titles and Texts</b> and <b>Show Titles Only</b> - Shows the titles and descriptions or only the titles of all terms in the view.
	<b>Show Current Title and Text / Show Current Title Only</b> - Toggle between showing the title and description or only the title of the selected term.

Tools	Description
	<b>Cut [Ctrl+X], Copy [Ctrl+C], and Paste [Ctrl+V]</b> - Perform the standard clipboard actions.
	<b>Delete [Ctrl+D]</b> - Deletes the selected term.
	<b>Customize Columns and Filter</b> - Opens a dialog to change the columns displayed in the list or define a filter (see <i>Customizing Object List Columns and Filtering Lists</i> on page 113).
	<b>Enable/Disable Filter</b> - Toggles the filter specified in the Customize Columns and Filter dialog.
	<b>Find [Ctrl+F]</b> - Opens a dialog to search for text.
	<b>Format [Ctrl+M]</b> - Opens a dialog to specify fonts and styles.
	<b>Bold, Italic, and Underline</b> - Format the selected text.
	<b>Align Left, Align Center, and Align Right</b> - Align the selected text.
	<b>Bullets</b> - Indent and bullet the selected text.
	<b>New Glossary Terms List</b> - Creates a new list.
	<b>Open Glossary Terms List</b> - Opens a dialog to select another terms list to view.
	<b>Export to Excel</b> - Saves the list to a *.xls, *.xlsx, or *.csv format (specify the format in the <b>Save as type</b> field in the Save as dialog).

**Note:** Right-click the glossary node in the Browser and select **Model Options** to set default formats for the term names and descriptions in your glossary terms lists (see *Glossary Model Options* on page 549).

## Checking the Glossary

To perform a model check on the glossary, right-click the glossary root and select **Check Model**. PowerDesigner provides default model checks to verify the validity of terms, synonyms, and categories.

For detailed information about working with model checks, see *Checking Models* on page 137. By default, these checks are provided for glossary objects:

Check	Description and Correction
Name and code uniqueness	<p>Term, synonym, and category names and codes must be unique in the glossary.</p> <ul style="list-style-type: none"> <li>Manual correction: Modify the duplicate name/code.</li> <li>Automatic correction: Appends a number to the duplicate name/code.</li> </ul>
Missing term definition	<p>Terms should be defined.</p> <ul style="list-style-type: none"> <li>Manual correction: Enter a definition in the Description field.</li> <li>Automatic correction: None.</li> </ul>

## Deploying the Glossary

Once you have created your glossary and added your terms, check it into the repository to automatically deploy it to all users connecting to the repository.

1. Right-click the Glossary root, and select **Check In** to open the Check In Document dialog (see *Checking Documents into the Repository* on page 291).
2. Enter an appropriate comment and click **OK** to complete the check in.

The glossary is now deployed to the repository and will be pushed to all users the next time they connect.

---

**Note:** You can continue to make modifications to your local glossary model, and each time that you check it in, your changes are pushed to users the next time they connect to the repository.

---

## Glossary Model Properties

The model property sheet displays information about the glossary model.

To open the glossary property sheet, double-click its entry in the Browser **Glossary** tab. The **General** tab contains the following properties:

Property	Description
Name / Code / Comment	Identify the model. The name should clearly convey the model's purpose to non-technical users, while the code, which is used for generating code or scripts, may be abbreviated, and should not normally include spaces. You can optionally add a comment to provide more detailed information about the model. By default the code is auto-generated from the name by applying the naming conventions specified in the model options. To decouple name-code synchronization, click to release the = button to the right of the <b>Code</b> field.
Filename	Specifies the location of the glossary model file.

Property	Description
Conjunctions	Specifies a comma-separated list of small words that are excluded from glossary compliance checks. For example: <i>and, of, to, the.</i>
Name / Code separators	Specify lists of characters that indicate the end of a word in the name and code fields to provide bounding of words for the compliance checking and auto-completion. By default, the characters <code> .</code> (space and dot) are set as separators for the name field and <code>_</code> (underscore) for the code field.
Author	Specifies the author of the model. If you enter nothing, the Author field in diagram title boxes displays the user name from the model property sheet Version Info tab. If you enter a space, the Author field displays nothing.
Version / Repository	Specify the version of the model. You can enter any value in the first field, while the second field displays the repository version.

## Glossary Model Options

You can set glossary model options by right-clicking the glossary node and selecting **Model Options**.

You can set the following options on the **Model Settings** page:

Option	Description
Name/Code case sensitive	Specifies that the names and codes for all objects are case sensitive, allowing you to have two objects with identical names or codes but different cases in the same model. If you change case sensitivity during the design process, we recommend that you check your model to verify that your model does not contain any duplicate objects.
External Short-cut Properties	<p>Specifies the properties that are stored for external shortcuts to objects in other models for display in property sheets and on symbols. By default, <b>All</b> properties appear, but you can select to display only <b>Name/Code</b> to reduce the size of your model.</p> <hr/> <p><b>Note:</b> This option only controls properties of external shortcuts to models of the same type (PDM to PDM, EAM to EAM, etc). External shortcuts to objects in other types of model can show only the basic shortcut properties.</p>

Click the **Terms Fonts** page to control the fonts and formatting used for the various types of text in your glossary terms lists (see *Glossary Terms Lists* on page 546).

## Deploying an Enterprise Library

An administrator or other user with `Write` permission on the `.Library` folder can check models, resource files, and external files such as Word documents or PDFs into the library and

have them pushed to repository users. Once one or more documents are added to the library, users connecting to the repository are invited to check them out into the library folder in their local workspace.

---

**Note:** For information about managing permissions, see *Granting Access Permissions on Repository Items* on page 534.

---

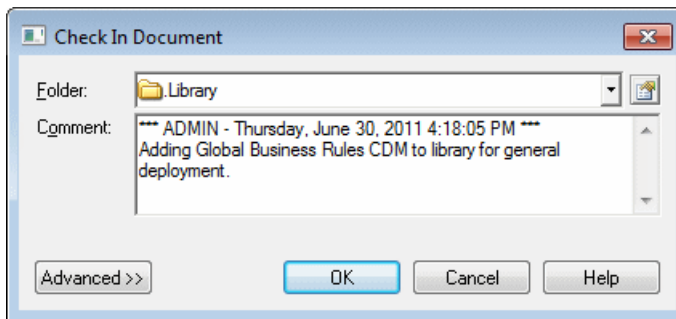
1. Select a model or other type of file (such as a Word document or PDF) that you want to deploy to all users, and connect to the repository.

---

**Note:** You cannot check projects into the library. For information about checking resource files into the library, see *Sharing Resource Files via the Library* on page 551)

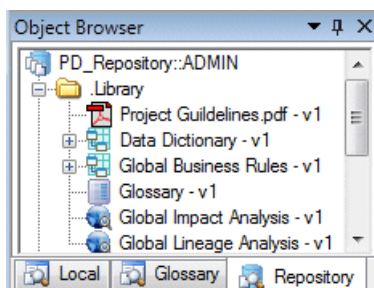
---

2. Right-click the document in the **Local** tab of the Browser and select **Check In**.
3. Select the **Library** folder as the destination for your check in and enter an appropriate comment:



4. Click **OK** to check in the model.

The document is checked into the library in the repository:



The next time users connect to the repository (or select **Repository > Synchronize Library**), they will be invited to check the model out into the library in their local workspace (see *Connecting to a Repository* on page 15).

---

**Note:** Branching (see *Branching Version Trees* on page 325) is not supported for the library.

---

## **Sharing Resource Files via the Library**

You can check DBMS definition files, extension files and other PowerDesigner resource files into the library. Resource files are pushed to repository users in the same way as other repository documents, and appear automatically in the new model dialog, resource file lists, and anywhere in the interface where a resource file can be selected.

1. [recommended] In the repository browser, create one or more folders inside the library folders to hold the resource files.

You could create a single folder to hold all resource files, or one folder for each type of resource file that you want to share. PowerDesigner recursively scans all folders in the library to populate resource file lists with shared resources.

2. Select **Tools > Resources > type** to open the list of resource files containing the file that you want to share (see *PowerDesigner Resource Files* on page 272).
3. Select the resource file to check in from the list and click the **Check In** tool.
4. Select the folder inside the library into which you want to check in the file, and enter an appropriate comment.

---

**Note:** If you check the resource into a folder outside the library and it is referenced by any models, PowerDesigner will try to resolve the reference when these models are checked out, but the resource will not be automatically synchronized in users' library folders and so will not be available for selection in lists of resource files.

---

5. Click **OK** to check in the resource.

The next time users connect to the repository (or select **Repository > Synchronize Library**, they will be invited to check the resource out into their local library, and it will immediately be available for use wherever a resource file can be selected.

---

**Note:** Resource files are not displayed inside the library folder in the Local workspace browser.

---

## **Controlling Library and Glossary Write Permissions**

Since library models and other documents are intended to be a reference for users, many administrators will want to closely control who can edit them. You control access to the Library folder with standard repository permissions. By default, all users can see the Library folder and have updates pushed to them as necessary, but only administrators have the right to modify the glossary and other library models.

The following are common uses of permissions on the Library folder and individual models within it:

- To allow a restricted group of users to modify library models - Create a **Compliance Committee or Library Administrators** group with **Write** permission on the Library folder. Sometimes a separate **Terminology Committee or Glossary**

## CHAPTER 19: Deploying an Enterprise Glossary and Library

`Administrators` group is created and `Write` permission on the glossary model is restricted to this subset of users.

- To allow other users to propose changes to library models via change lists - Grant them `Submit` permission on the `Library` folder. Changes proposed are only applied to the library models if they are approved by your administrators (see *Change Lists* on page 303).
- To hide library models while they are being developed - Remove the `All Users` group from the permissions list of individual models until they are ready for deployment.

For detailed information about setting repository permissions, see *Granting Access Permissions on Repository Items* on page 534.



# Customizing the PowerDesigner Interface

You can customize the New Model dialog to guide model creation through templates and use profiles to hide types of models, objects, and object properties, and to customize menus, commands, and preferences.

## Customizing the New Model Dialog

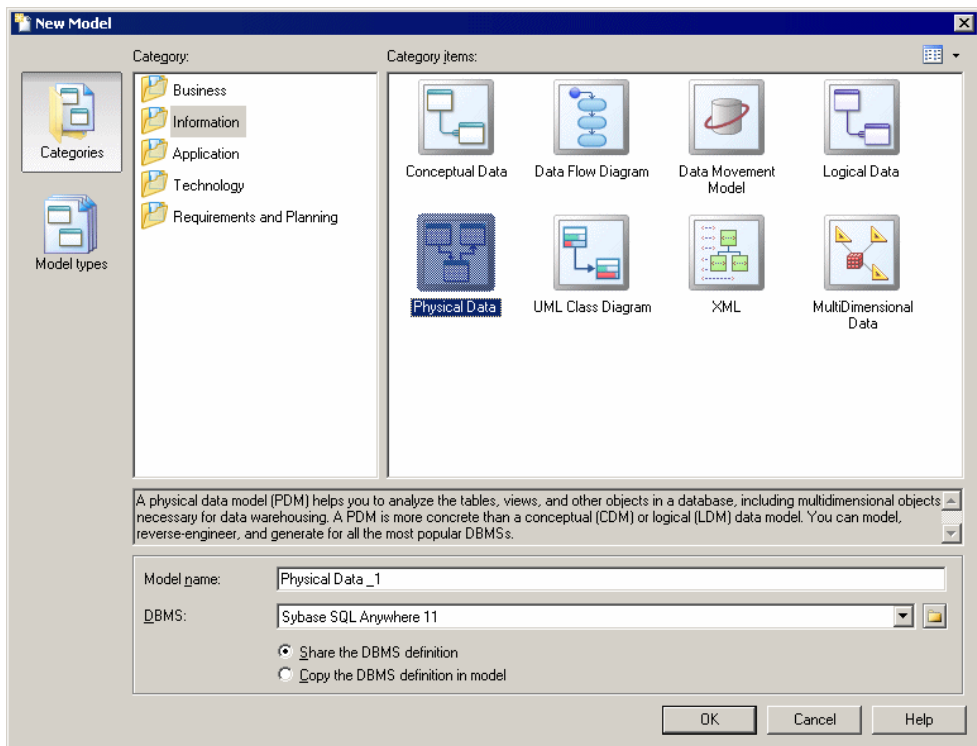
---

A model category set is a PowerDesigner resource file that contains one or more categories, which in turn contain templates to guide users through model creation in the New Model dialog. Using categories and templates for model creation simplifies the model creation process by preselecting appropriate targets, extensions, and diagrams, and by hiding irrelevant choices from users.

To view the list of model category sets, select **Tools > Resources > Model Category Sets**. For information about the tools available in resource file lists, see *PowerDesigner Resource Files* on page 272.

You can deploy model category sets to users (see *Sharing Resource Files via the Library* on page 551) to ensure that everyone on your team is creating models using the same centralized targets and extensions checked out automatically from the repository. You can create different category sets for different users so that, for example, data architects will have different choices from business analysts when they open the New Model dialog.

In the following example, the Information category is selected and provides eight templates to choose from:

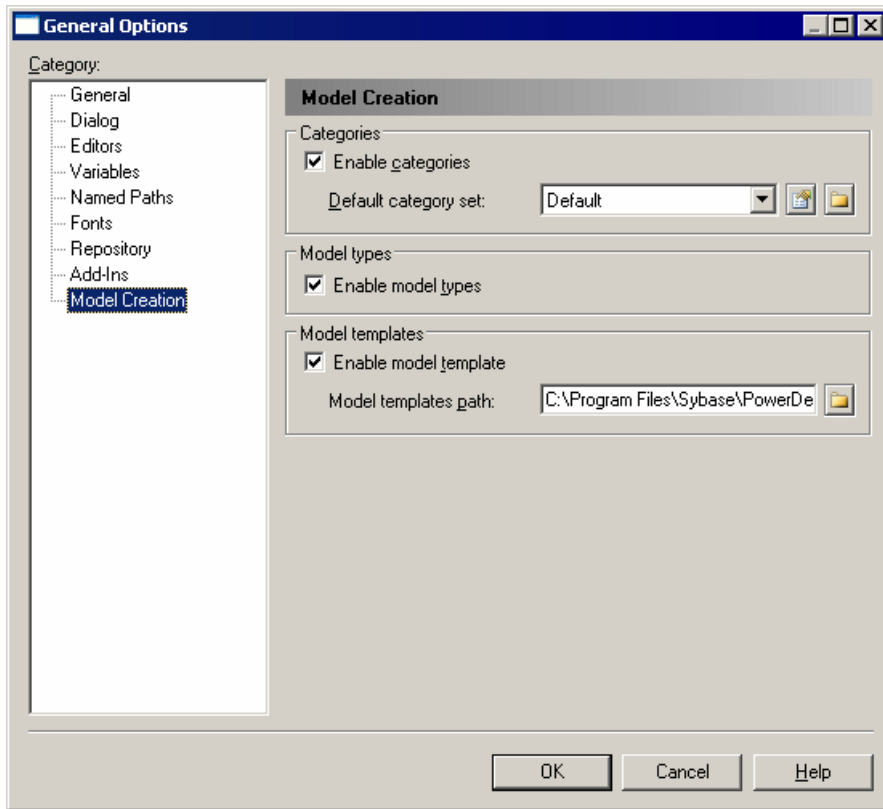


**Note:** You can also hide model types from certain types of users with object permission profiles (see *Controlling the Availability of Models, Objects, and Properties* on page 560).

## Selecting a Model Category Set to Display in the New Model Dialog

The model category set you select in the Model Creation general options will be displayed in the New Model window.

1. Select **Tools > General Options**, and click the **Model Creation** category in the left hand pane.



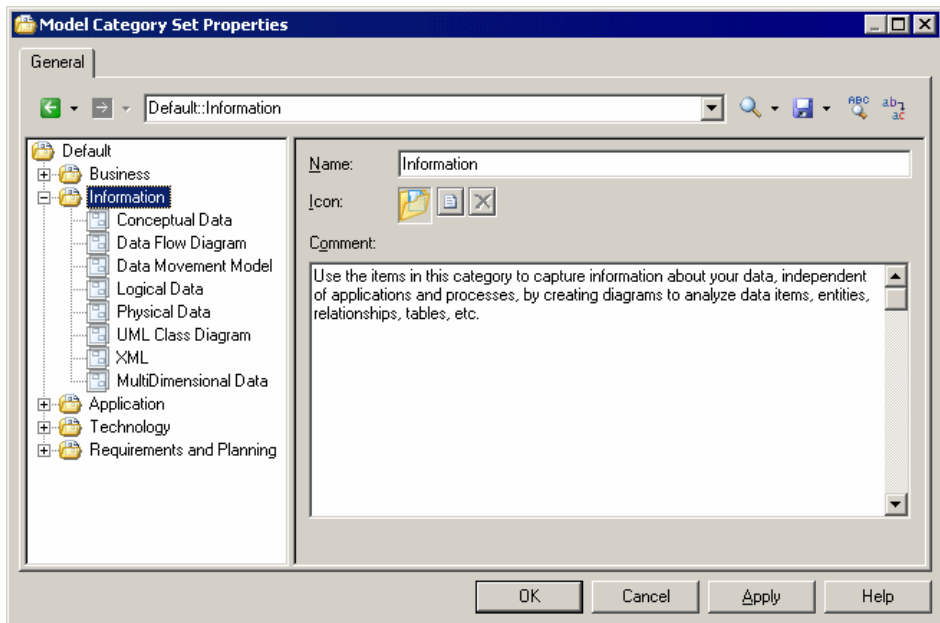
2. Verify that the **Enable categories** check box is selected, and select the category set you want to display from the Default category set list.
3. [optional] Click the **Path** tool to the right of this field to browse to another folder containing model category sets or the **Properties** tool to open the currently-selected set in the Resource Editor.
4. Click **OK** to close the General Options dialog.  
The selected category set and the templates it contains will be displayed in the New Model dialog next time you open it.

## Creating a Model Category Set

You can create as many different model category sets as you need, creating different sets for different types of users, for example.

1. Select **Tools > Resources > Model Category Sets** to open the List of Model Category Sets.
2. Click the **New** tool to open the New Model Category Set dialog.
3. Enter a name for your model category set, and select a source to copy it from. You can choose between:

- <Default template> – creates an empty set that you complete by adding categories and templates.
  - Another model category set – makes a copy of an existing set that you can edit as necessary.
4. Specify a name and a location to create the set and click **Save**.  
The model category set is created and opened for review in the Resource Editor.
  5. For each category that you need, right-click the root node, and select **New**. In the right-hand pane, enter a name for the category and, optionally, click the **Browse for icon** tool to change the default icon.
- 
- Note:** You can reorder the categories if necessary by drag and drop.
6. When you have created your categories, you add templates to them by right-clicking the category and selecting **New** and then one of the following:
    - Model - creates a simple model template that can specify a default target, extensions, and an empty first diagram (see *Adding a Model Template to a Model Category Set* on page 557).
    - Model from Template - which points to an actual model file that, in addition to specifying a target and extensions, can contain multiple diagrams, display preferences, general and model options, etc (see *Adding a Model from Template to a Model Category Set* on page 558)
  7. When you have finished creating categories and templates, click OK to close the resource editor and click the Save tool in the List of Model Category Sets to save your edits.



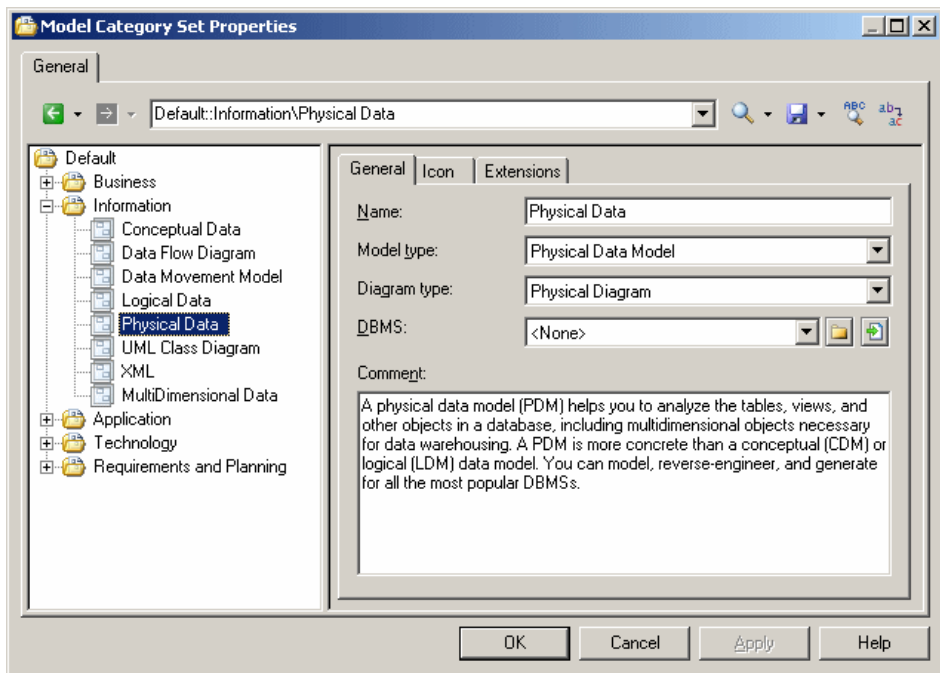
You can test your category set by selecting it in the General Options dialog (see *Selecting a Model Category Set to Display in the New Model Dialog* on page 554) and selecting **File > New Model**.

### **Adding a Model Template to a Model Category Set**

Model templates are simple templates that can specify a default target, extensions, and an empty first diagram.

1. Right-click the category to which you want to add the template, and select **New > Model**.
2. On the **General** tab, enter a template name and select a model and diagram type.
3. [optional, for model types with targets] Specify a target (DBMS, object or process language, etc). If you select None, then the user can select any available target language in the New Model dialog.
4. [optional] On the **Icon** tab, click the **Browse for icon** tool to change the default template icon.
5. [optional] On the **Extensions** tab, click the **Select Extensions** tool to attach one or more extensions to the model (see *Attaching Extensions At Model Creation Time* on page 11).
6. [optional] Select the **Allow additional extensions at model creation** check box if you want to allow users to attach additional extensions to those you have specified. The **Extensions** button in the New Model dialog is not available if you do not select this check box.

In the following example, the Physical Data template is specified to create a Physical Data Model with a physical diagram, and since no DBMS is specified, the user will be able to choose one at model creation time:



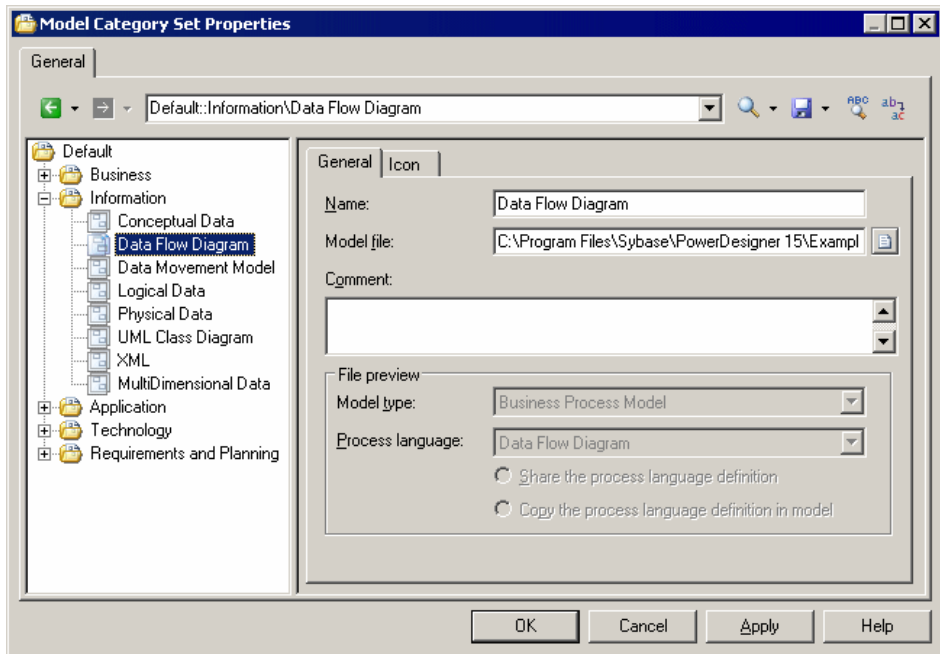
### **Adding a Model from Template to a Model Category Set**

Models from templates are templates that point to existing model files that, in addition to specifying a target and extensions, can contain multiple diagrams, display preferences, general and model options, etc.

In order to add a model from template to a category, you must have a model file that contains all the appropriate parameters ready to point to.

1. Right-click the category to which you want to add the template, and select **New > Model from Template**.
2. On the General tab, enter a template name and click the **Select File** tool to the right of the Model file field to browse to and select the model file to use as the template.
3. [optional] On the Icon tab, click the **Browse for icon** tool to change the default template icon.

In the following example, the Data Flow Diagram template is specified to create a Business Process Model from an existing dfd.bpm model, and will inherit its pre-configured options, preferences, extensions, and objects:



## Pushing Model Category Sets to Users

You can deploy your model category sets to the library to make them available to other users.

1. Select **Tools > Resources > Model Category Sets** to open the List of Model Category Sets.
2. Select the category set you want to push to other users and click the **Check In** tool.
3. Select the folder inside the library into which you want to check in the category set, and enter an appropriate comment.

---

**Note:** If you check the category set into a folder outside the library, it will not be available for selection in the General Options dialog. For more information about the library, see *Deploying an Enterprise Library* on page 549.

---

4. Click **OK** to check in the category set.

The next time users connect to the repository (or select **Repository > Synchronize Library**, they will be invited to check the category set out into their local library, and it will immediately be available for selection when they click **Tools > General Options**, and click the **Model Creation** category in the left pane.

## Using Profiles to Control the PowerDesigner Interface

---

An administrator can create profiles in the repository to customize and simplify the PowerDesigner interface for users by hiding types of models, objects, and object properties, by reconfiguring menus, toolbars, and toolboxes, and by setting appropriate defaults for options and preferences. You can define multiple profiles to customize the interface in different ways for different kinds of users and apply them as appropriate to individual user accounts or to repository groups.

Three types of profiles are available to administrators to customize the PowerDesigner interface for users:

- Object permissions profiles - to hide types of models or make them read-only, and to hide model objects and object properties. Use these profiles to simplify the modeling environment by presenting users with only the concepts that they need:
  - Hiding a module - prevents the creation or opening of models of this type.
  - Hiding an object - removes it from the Toolbox, Browser, **Model** menu, **New** contextual menu, and property sheets.
  - Hiding an attribute or collection - removes it from object symbols and property sheets.
- UI preferences profiles - to customize the commands available in menus, toolbars, and toolboxes. Use these profiles to reorganize and simplify the PowerDesigner interface for users. They provide the same kind of customization as users can perform using the **Tools > Customize Menus and Tools** command (see *Customizing Menus, Toolbars, and Toolboxes* on page 270).
- General preferences profiles - to set default display preferences and model and general options. Use these profiles to guide users toward making appropriate option and preference choices. They provide the same kind of customization as users can perform using user profiles (see *User Profiles* on page 249).

## Controlling the Availability of Models, Objects, and Properties

---

An administrator can define object permissions profiles to hide models, objects, and properties, or make models available in read-only form for users or group of users. By default, all types of models, objects, and properties are available and you hide them (or make them read-only) by adding entries to an object permissions profile.

1. Connect to the repository and then select **Repository > Administration > Object Permission Profiles**.
2. Click the **Create an Object** tool, enter a name for the profile, select a template to start from, and click **OK** to create and open it in the Resource Editor.
3. [optional] Click the **Import Items** tool to import an existing profile, review the items to be imported in the Merge dialog, and then click **OK** to complete the import.



For detailed information about working with this dialog, see *Merging Models* on page 226. You can repeat this step as many times as necessary to import additional profiles.

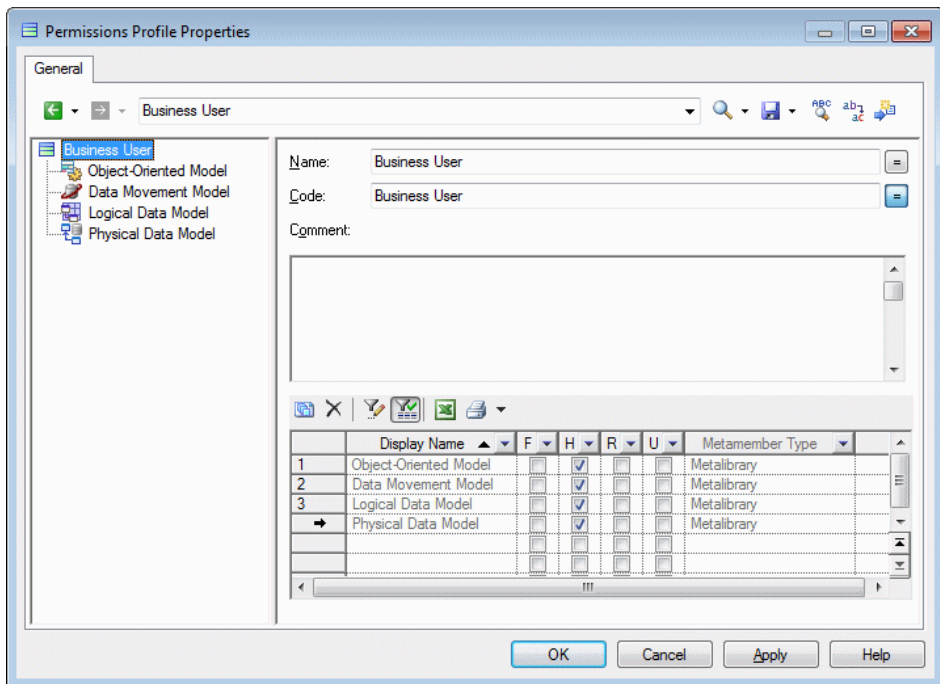
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**Note:** PowerDesigner provides a number of example profiles, which you can combine as necessary and edit to support your particular workflow (see *Example Permission Profiles* on page 564).

---

4. To modify the status of model types (modules) for users associated with this profile, right-click the root element and select **Add Modules to Customize** (or click the equivalent tool in the toolbar), select the modules and click **OK** to add them to the profile. Then select the appropriate status:
  - **Undefined** - [default] The module's availability is not specified in the profile. This status is useful when the profile will be combined with others, and these other profiles will determine the availability of the module. The module can be customized by hiding objects, object attributes, and collections.
  - **Enable** - The module is available to users associated with the profile, and can be customized by hiding objects, attributes, and collections.
  - **Disable (Hide)** - The module and all models of this type are hidden to users associated with the profile. No further customization is possible.
  - **Read-Only** - The module is available to users associated with the profile, but they may not edit models of this type. No further customization is possible.

In this example, the OOM, DMM, LDM, and PDM are added to the profile to hide them from business users:



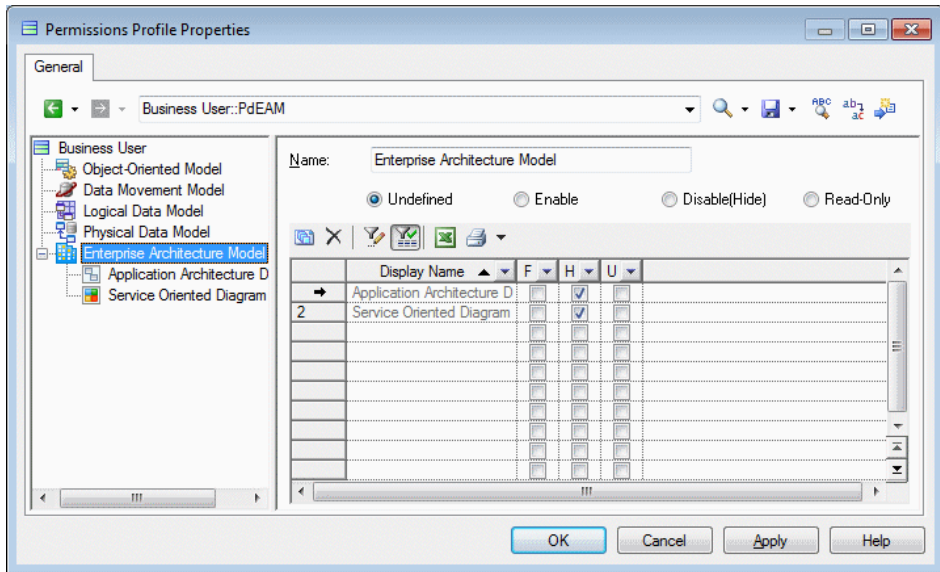
5. To modify the status of object types (metaclasses) for users associated with this profile, right-click the parent module, select **Add Metaclasses to Customize** (or click the equivalent tool in the toolbar), select the metaclasses and click **OK** to add them to the profile. Then select the appropriate status:
  - **Undefined** - [default] The metaclass's availability is not specified in the profile. This status is useful when the profile will be combined with others, and these other profiles will determine the availability of the metaclass. The metaclass can be customized by hiding attributes and collections.
  - **Enable** - The metaclass is available to users associated with the profile, and can be customized by hiding attributes and collections.
  - **Disable (Hide)** - The metaclass and all objects of this type are hidden to users associated with the profile. No further customization is possible.

---

**Note:** To add a metaclass defined in a DBMS, language definition, or extension file to a permission profile, enter it by hand in the format *metaclass::stereotype*. For example, to hide Sybase IQ events, enter *ExtendedObject::Event*, and select the checkbox in the **H** column.

---

In this example, the Application Architecture Diagram and Service Oriented Diagram metaclasses are added to the profile to hide them from business users:



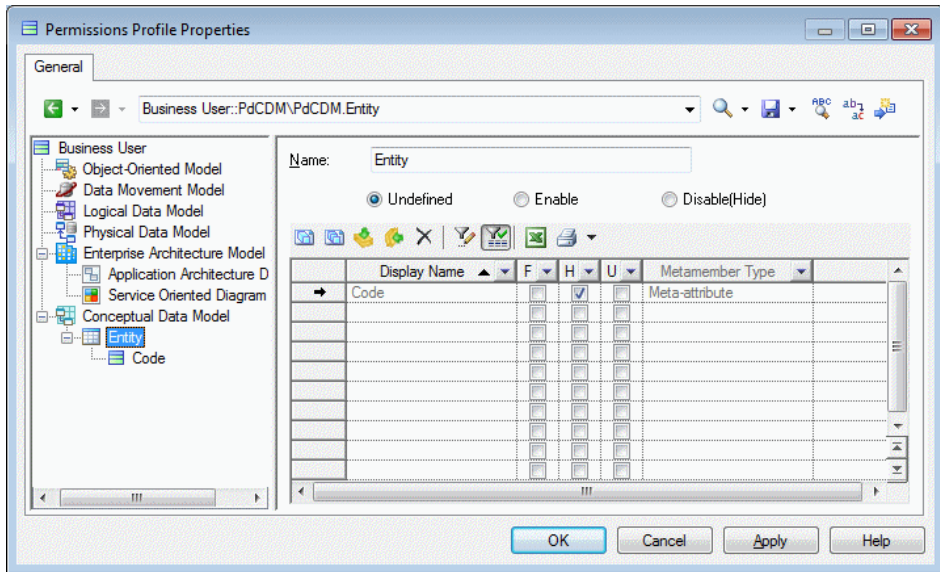
6. To modify the status of object properties (attributes and collections) for users associated with this profile, right-click the parent metaclass and select **Add Meta-attributes to Customize** or **Add Metacollections to Customize** (or click the equivalent tool in the toolbar), select the attributes or collections and click **OK** to add them to the profile. Then select the appropriate status:
- **Undefined** - The attribute or collection's availability is not specified in the profile.
  - **Enabled** - The attribute or collection is available to users associated with the profile.
  - **Disabled (Hidden)** [default] - The attribute or collection is hidden to users associated with the profile.

---

**Note:** To add an extended attribute defined in a DBMS, language definition, or extension file to a permission profile, enter it by hand. For example, to hide the DBSpace attribute for Sybase IQ tables, enter DBSpace, and select the checkbox in the **H** column.

---

In this example, the entity Code attribute is added to the profile to hide it from business users:



**Note:** You can propagate customizations of properties to other metaclasses, including to metaclasses in other types of models. Select a metaclass with customized properties and click the **Apply to All Metaclasses in This Module** or **Apply to All Metaclasses in All Modules** tool or right-click a meta-attribute or metacollection and select:

- **Apply to All Metaclasses in This Module** - to propagate its customization to all other metaclasses that include this property in the present module. PowerDesigner will add the minimum number of metaclasses necessary to apply the customization by exploiting inheritance in the metamodel. This often involves adding the Named Object and a handful of other metaclasses.
- **Apply to All Metaclasses in All Modules** - to propagate its customization to all other metaclasses that include this property in all the modules that are included in the profile. PowerDesigner will not add additional modules to the profile, so if you want to customize the property everywhere it appears, you must first add all relevant modules.

7. Click **OK** to save the profile in the repository.

### **Example Permission Profiles**

PowerDesigner provides a set of permission profiles that you can merge into your own profiles, combining, editing, or adding to them as appropriate for your team's working practices.

There are four kinds of example profiles available in the *Install\_dir/Resource Files/Profiles* directory:

- **Hide Objects** - Remove one or more types of objects from the Toolbox, Browser, **Model** menu, **New** contextual menu, and property sheets:

- Hide Objects - Business Rules
- Hide Objects - EAM Application Objects
- Hide Objects - EAM Business Objects
- Hide Objects - EAM Technology Objects
- Hide Objects - Traceability Links
- Hide Properties - remove attributes and collections from object symbols and property sheets:
  - Hide Properties - Codes for Non-Data Objects
  - Hide Properties - Keywords
  - Hide Properties - Mappings
  - Hide Properties - Related Diagrams
  - Hide Properties - Stereotype
  - Hide Properties - Technical Properties
- Lock - Prevent the user from changing special model properties:
  - Lock - Extensions (removes extension files from the Browser, **Model** menu, and **New** contextual menu to prevent users changing extensions)
  - Lock - Model Options (removes the **Model Options** command from the **Tools** menu to prevent users changing model options)
- Role - Control the availability of modules for various types of users:
  - Role - Developer (hides the BPM and EAM, and makes the CDM, LDM, and RQM read-only)
  - Role - Enterprise Architect (hides or makes read-only all models except the EAM)
  - Role - Information Architect (hides the RQM, and makes the BPM, EAM, and OOM read-only)
  - Role - Process Architect (hides or makes read-only all models except the BPM)

### **Controlling Defaults for Menus, Toolbars, and Toolboxes**

An administrator can define UI preferences profiles to control the default configuration of menus, toolbars, and toolboxes for users or group of users.

1. Connect to the repository and then select **Repository > Administration > UI Preference Profiles**.
2. Click the **Create an Object** tool, enter a name for the profile, select a template to start from, and click **OK** to create and open it in the Customize Menus and Tools dialog.
3. Select and modify the menus, toolbars, and toolboxes for the appropriate views using the various panels in the dialog (see *Customizing Menus, Toolbars, and Toolboxes* on page 270).
4. Click **OK** to save the profile in the repository.

## **Controlling Defaults for Options and Preferences**

An administrator can define general preferences profiles to control the default values for display preferences, model options, general options, and other preferences for users or group of users.

1. Connect to the repository and then select **Repository > Administration > General Preference Profiles**.

These profiles are the same as those that individual users can use to customize their options and preferences (see *User Profiles* on page 249).

2. Click the **Add a Row** tool, enter a name, and click the **Properties** tool, to create the profile and open it in the resource editor.
3. Click the **Create an Object** tool, enter a name for the profile, and select a source from which to copy from. You can choose between:
  - Another user profile – Makes a copy of the existing profile.
  - <Registry> - Copies all your PowerDesigner defaults from your Windows registry.
  - <Model> - Opens the Model for User Profile dialog, which allows you to specify preferences to copy from an open model (see *Copying Preferences from a Model* on page 253).
4. Click **OK** to open the profile in the Resource Editor.
5. [optional] Click the **Import Items** tool to import an existing profile, review the items to be imported in the Merge dialog (see *Merging Models* on page 226), and then click **OK** to complete the import.

You can repeat this step as many times as necessary to import additional profiles.

6. Edit the profile as necessary (see *Reviewing and Editing User Profiles in the Resource Editor* on page 253).
7. Click **OK** to save the profile in the repository.

## **Applying Profiles to Users and Groups**

An administrator applies object permissions profiles, UI preferences profiles, and general preferences profiles to a user or group via their repository property sheet **Profiles** tab.

---

**Note:** Though you can apply only one of each type of profile to each user or group, you can apply multiple profiles to a user or group by inserting them into multiple groups or by using a hierarchy of groups (see *Adding Users and Groups to a Group* on page 532).

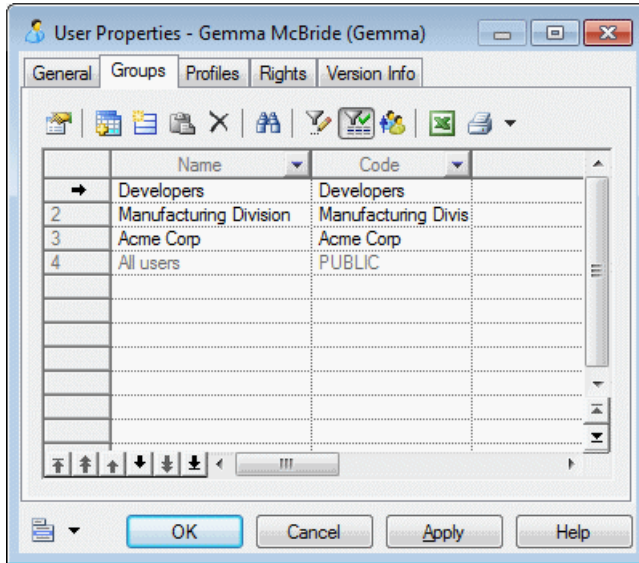
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Where a user or group is associated with multiple profiles through membership in multiple groups, the following rules apply:

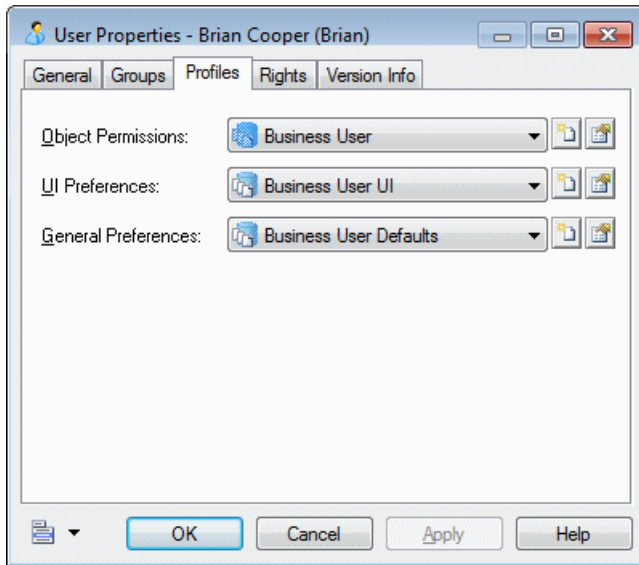
- Object Permissions Profiles - The most permissive superset of permissions is applied and the order of group membership is unimportant. For example, if the user is associated with

one profile which hides the EAM module and another which enables it, then it will be visible for him.

- UI and General Preference Profiles - Preferences are applied starting from the bottom of the list on the **Groups** tab and finishing with any profile applied directly to the user, with the last applied preferences being used in the case of conflicts. In the following example, any UI or preference profile applied to the All users group will be applied, followed by those for the Acme Corp, Manufacturing Division, and Developers groups, and finally any profile applied to Gemma herself:



1. Create appropriate object permission, UI preference, and general preference profiles in the repository.
2. Select **Repository > Administration > Users** (or **Repository > Administration > Groups**) and select the user or group to whom you want to apply the profile.
3. Click the **Properties** tool to open the user's property sheet, and then click the **Profiles** tab.
4. Select the appropriate profile in one or more of the **Object Permissions**, **UI Preferences**, and **General Preferences** fields, and click **OK**.



When the user next connects to the repository, the selected profiles will be pushed to their installation of PowerDesigner.

---

**Note:** Permissions profiles are enforced (the user cannot access types of models or objects that are hidden from her), and the defaults specified in the UI and general preference profiles are re-applied each time the user connects to the repository (if the **Apply profiles** option is selected in the user's repository general options (see *Repository Options* on page 265)).

---



## Securing Your PowerDesigner Environment

A typical PowerDesigner environment comprises a number of networked components that an administrator is responsible for securing through appropriate encryption and authentication policies.

Administrators should consider the following when planning to secure your PowerDesigner environment:

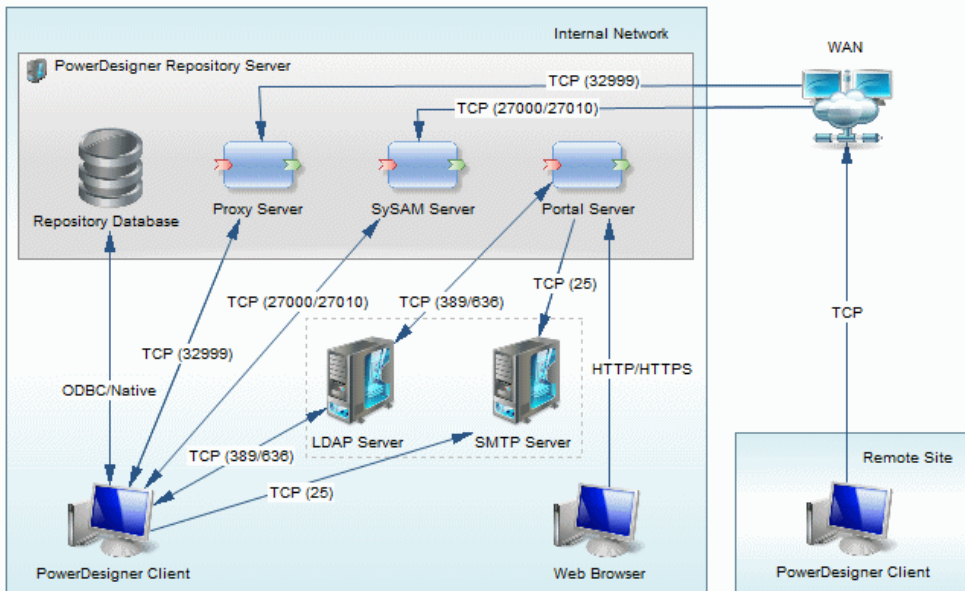
- Encrypt communications with the repository (see *Encrypting PowerDesigner Network Communications* on page 570).
- Delegate repository user authentication to an existing LDAP server (see *Connecting to an LDAP Server for User Authentication* on page 524).
- Enforce security and renewal of passwords by defining an appropriate password policy (see *Defining a Password Policy* on page 528).
- Control access to specific repository features through rights (see *Granting Rights to Users and Groups* on page 533).
- Control access to specific repository documents through permissions (see *Granting Access Permissions on Repository Items* on page 534).
- Review proposed changes to repository documents through the use of change lists (see *Change Lists* on page 303).
- Be aware of the possibility for emergency access to the repository (see *Obtaining Emergency Access to the Repository* on page 538).

The following forms of monitoring are available:

- The list of repository activities (see *Auditing Repository Activities* on page 536).
- The repository proxy log file (see *Installation Guide > Installing the Repository Proxy*).
- If you are experiencing problems with memory usage or repository database performance, contact customer support to obtain access to further debugging features.

## Encrypting PowerDesigner Network Communications

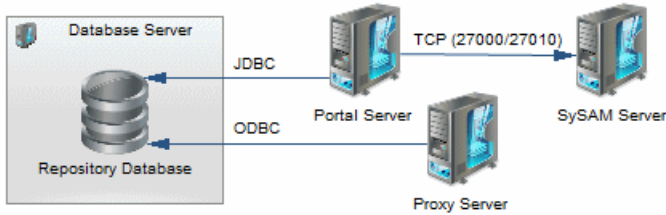
The majority of PowerDesigner Network Communications, including all those over which sensitive information may transit can be encrypted or are encrypted by default.



The network connections shown in the diagram can be encrypted as follows:

- PowerDesigner Client to Repository - encryptable through options in the appropriate connection profile (see *Password and Data Encryption* on page 573).
- PowerDesigner Client to Proxy - encrypted by default.
- PowerDesigner Client to SySAM - not encryptable.
- PowerDesigner Client and Portal Server to LDAP Server - can be encrypted by enabling SSL (see *Connecting to an LDAP Server for User Authentication* on page 524).
- PowerDesigner Client and Portal Server to SMTP Server - can be encrypted by enabling SSL (see *Connecting to an SMTP Server for Notifications* on page 527).
- Web Browser to Portal Server - can be encrypted by enabling SSL (see *Enabling SSL for the PowerDesigner Portal* on page 571).

The components installed to the PowerDesigner Repository Server can be installed on separate servers, to make use of an existing database server, for instance, or to spread the processor load to maximize performance:



In this situation, the additional network connections can be encrypted as follows:

- Proxy Server to Repository - encryptable through options in the appropriate connection profile (see *Password and Data Encryption* on page 573).
- Portal Server to Repository - encryptable through options in the appropriate connection profile (see *Password and Data Encryption* on page 573).
- Portal Server to SySAM - not encryptable.

## **Enabling SSL for the PowerDesigner Portal**

This topic provides guidance for setting up SSL security for the PowerDesigner Portal environment. For detailed information, please see your application server's documentation.

### *Using the Default Tomcat Server*

You will need to edit the Tomcat `server.xml` file to set the `keystoreFile` attribute to use the default keystore file for SSL connections and have clients connect using the default `client.keystore` file.

For example, if you have installed the PowerDesigner Portal at `c:\sybase\cmr`:

```
<Connector port="8443" maxHttpHeaderSize="8192"
  maxThreads="150" minSpareThreads="25" maxSpareThreads="75"
  enableLookups="false" disableUploadTimeout="true"
  acceptCount="100" scheme="https" secure="true"
  clientAuth="false" sslProtocol="TLS"
  keystoreFile="C:\sybase\cmr\keystore\server.keystore">
</Connector>
```

For more information, see <http://tomcat.apache.org/tomcat-5.5-doc/ssl-howto.html>

### *Using an Existing SSL Implementation*

If you deploy the PowerDesigner Portal to an existing Tomcat server running SSL, you will need to export the certificate from your existing keystore file by using your keystore tool. If the keystore file contains many certificates, make sure you export the certificate which the Tomcat server uses. For example, using the JDK's `keytool`:

```
keytool -export -alias tomcat -file
  tomcat.cert -keystore <keystorefile>
```

Once the certificate is exported, you must import it to the `%CMR_HOME%\keystore\client.keystore` file using the JDK's `keytool`. For example:

```
keytool -import -alias tomcat -file tomcat.cert
  -keystore %CMR_HOME%\keystore\client.keystore
```

The password to the `client.keystore` is `changeit`.

### *Using an Existing Client Keystore*

If you already have a client keystore file to connect to the server and don't want to use the supplied default `client.keystore` file, you can either manually edit the `web-inf/config/cmrclient.xml` file or login to the PowerDesigner Portal as an administrator and change the following parameters:

```
<bean class="java.lang.Object" id="cmr.client.config.ssl">
    <param name="keyStoreFile" value="client.keystore"/>
    <param name="keyStoreFilePath" value=""/>
    <param name="keystorePass" value="changeit"/>
    <param name="truststorePass" value="changeit"/>
</bean>
```

## **Controlling SSL Encryption for the PowerDesigner Portal**

All passwords saved in the repository configuration files are encrypted and are decrypted at runtime. User passwords are encrypted when making connection to the repository.

The default keys used for the encryption and decryption process are saved in the following file:

```
install_dir/keystore/common.keystore
```

For security purposes, we recommend that you generate your own key and keystore file. The keystore information is saved in the following file:

```
install_dir/keystore/config/cmrcommon.xml
```

This file contains the following XML structure:

```
<cmrcommon>
    <!-- Keystore Configuration -->
    <bean class="java.lang.Object" id="cmr.common.config.keystore">
        <!-- if value is empty, default to cmr home\keystore folder
    -->
        <param name="keyStoreFilePath" value=""/>
        <param name="keyStoreFileName" value="common.keystore"/>
        <param name="keyStoreAlias" value="cmrenkey"/>
        <param name="keyStorePassword" value="changeit"/>
    </bean>
</cmrcommon>
```

You can edit the following nodes:

- `keyStoreFilePath` – Specifies the path to the keystore file. Default value: `install_dir/keystore/`.
- `keyStoreFileName` – Specifies the name of the keystore file.
- `keyStoreAlias` – [required] Specifies the name of the alias of the key in the keystore.
- `keyStorePassword` – [required] Specifies the password to read the keystore.

You can use the following command to generate a 512 byte key and keystore file:

```
JDK_HOME\bin\keytool -genkey -keyalg RSA -keysize 512 -alias
keyStoreAlias -keypass keyStorePassword -keystore keyStoreFilePath
\keyStoreFileName -storepass keyStorePassword
```

For example: to generate a new key using the default values specified in the cmrcommon.xml file:

```
JDK_HOME\bin\keytool -genkey -keyalg RSA -keysize 512 -alias
cmrkey -keypass changeit -keystore install_dir\keystore
\common.keystore -storepass changeit
```

**Note:** All PowerDesigner Portal web application layer installations that need to connect to a PowerDesigner Portal Server must use the same keyStore file.

## Password and Data Encryption

PowerDesigner supports encryption of both passwords and data for direct and proxy connections to a repository and for connections to other databases using most of the supported DBMSs via one or more of native, ODBC, and JDBC connection profiles.

The following table provides information and examples for encrypting passwords and data with each type of connection:

Type	Encryption
Native	<p>Password and data encryption can generally be enabled with connection parameters.</p> <p>For example, the password for Sybase Adaptive Server Enterprise is encrypted by default, and you can enable data encryption by setting the <code>Sec_Confidential</code> connection parameter to 1.</p>
ODBC	<p>Password and data encryption can generally be enabled in the ODBC Configuration dialog.</p> <p>For example, to encrypt the password for Sybase SQL Anywhere, select the <b>Encrypt password</b> option on the <b>Login</b> tab, and to encrypt data, select an encryption method on the <b>Network</b> tab.</p>
JDBC	<p>It is not possible to control password and data encryption through the PowerDesigner connection profile interface, but you may be able to enable encryption directly in your database client.</p>

For more information about using PowerDesigner connection profiles, see *Connecting to a Database* on page 18. For detailed information about encryption and other parameters for your database, see your DBMS documentation.



# Index

\_ADMIN 538  
 .convert\_code macro 146, 150  
 .convert\_name macro 146, 150  
 .xems  
     See extension files

## A

access  
     protection 302  
 Active Directory  
     controlling repository access 524  
 ActiveX (add-in) 262  
 activity (repository)  
     audit 536  
     consult 536  
     list 536  
     manage all documents 536  
     open list 536  
 add-in  
     declare 262  
 additional area (framework matrix)  
     properties 84  
 ADMIN 14  
 align symbol 191  
 analysis rule 512  
     list of libraries 512  
     metaclasses 512  
     properties 512  
 analysis rule set 512  
     create 515  
 API 31  
 apply transformations 167  
 approving change lists 307  
 arc 203  
 artifact 160  
     add objects 165  
     C# 160  
     change file name 165  
     create hierarchy 165  
     default template 160  
     define 164  
     drag and drop objects 165  
     enforce dependencies 166  
     folder 165

    generate 166  
     generate from folder 166  
     how to use them 160  
     objects 164  
     overview 164  
     prerequisites 164  
     stereotype 160  
     template 164  
     VB .NET 160  
 association (OOM)  
     mapping 481  
 attach  
     file object to a PowerDesigner object 136  
 attribute  
     adding 154  
     display on symbol 215  
     replication 464  
 audit repository activity 536  
 auto-connect to repository 265  
 auto-layout 190  
 automatic correction (check model) 139  
 autosave 255

## B

batch update 299  
 bend link 187  
 bitmap 218  
 book report items  
     adding 381  
     formatting 381  
     modifying contents 381  
     modifying selection 381  
 border  
     format 405  
     width 405  
 branch  
     base 325  
     create 325  
     delete 330  
     impact analysis 518  
     integrate 328  
     permissions 327  
 browser  
     find objects 332  
     repository 287, 289

## Index

- repository folder 288
- root 290
- Browser 3, 35, 268
  - find object symbol 172
  - glossary 36
  - library 39
  - Repository 41
  - tree view 3
- business analyst 6
- business rule 131

- apply 133
- check parameter 131
- checks 140
- constraint 131
- create 131
- definition 131
- fact 131
- formula 131
- OCL 131
- OCL constraint 131
- properties 131
- requirement 131
- type 131
- validation 131

bytes per char 13, 265

## C

- C# artifacts 160
- calculated collection 402
- CanLinkKind 136
- canvas 3
- Canvas 268
- card
  - display information 410
  - extended attributes 410
  - hyperlinks in HTML report 410
  - layout 410
  - shortcut 379, 399
- card report items
  - adding 382
  - formatting 382
- category 35
  - glossary 545
  - properties 545, 547
- cell (framework matrix)
  - contextual menu 63
  - format 78
  - image 78
  - properties 84

- specifying actions 65
- change list 291
  - properties 310
- change lists 303
  - approving 307
  - checking out documents from 306
  - comparing documents 306
  - finding documents in 306
  - List of Change Lists 309
  - rejecting 307
  - returning for revision 307
  - reviewing 306
  - submit 305
  - updating documents from mainline 306
- change notifications 340
- changes on server 35
- charset
  - HTML report 423
  - valid codepage 423
- chart report items
  - adding 384
  - formatting 384
  - modifying contents 384
  - modifying selection 384
- check glossary 547
- check in
  - batch update 299
  - document 291, 293
  - external application document 301
  - freeze current version 302
  - interactive update 299
  - keep repository changes 299
  - lock 302
  - model 291
  - multiple documents 295
  - package 291, 301
  - parameters 297
  - project 291, 292
  - resolve manually 299
  - temporary protection 302
  - undo 302
  - update options 299
  - use my changes 299
- check model 137
  - automatic correction 139
  - business rule 140
  - extended link 141
  - extended object 141
  - file 142



- glossary compliance 142
    - manual correction 139
    - replication 142
  - check out
    - configuration 325
    - document 311, 312
    - find objects 332
    - merge models 316
    - model 311
    - multiple documents 313
    - package 317
    - parameters 315
    - permissions 317
    - project 311, 312
  - check out dependencies 511
  - check parameter (business rule) 131
  - circle 203
  - class (OOM)
    - mapping 481
  - client/server environment 287
  - code
    - preview 102
  - code page 153
  - code property
    - .convert\_code macro 150
    - converting in GTL 150
  - code to name conversion 146
  - collection
    - display on symbol 216
    - manage images 200
    - replication 464
  - column
    - default 409
    - list item 409
    - width 409
  - compare
    - filter 232
    - models 223, 333
    - options 230
    - preview 233
    - print 233
    - property differences 223
    - save 233
  - composite view
    - editable mode 198
    - read-only (sub-diagram) mode 198
  - Conceptual Impact Analysis 512
  - Conceptual Lineage Analysis 512
  - configuration
    - check out 325
    - create 322
    - create from folder 325
    - create from project 325
  - connect
    - automatic 17
  - connection profile 21, 27
    - JDBC example 26
    - native example 25
    - properties 24
    - tools 26
  - content 210
  - contextual menu 167
  - conversion script 146
  - conversion table 146
    - create 149
    - glossary 146
  - conversion tables 272
  - convert diagram to package 177
  - copy
    - drag and drop 122
    - object 123
  - copy permissions to all children 534
  - copying resource files 274
  - create model 9
  - creating resource files 274
  - creation date 106
  - CRUD matrix
    - format 405
  - csv (conversion tables) 272
  - custom dictionary 153
  - custom shape 193
  - custom symbol
    - format 197
  - customize
    - menu 270
    - property sheet 99
    - toolbar 270
    - toolbox 270
  - customizing
    - New Model dialog 264
- ## D
- data
    - encryption 569, 573
  - data administrator 6
  - data analyst 6
  - data connection 18, 19, 21, 24, 26, 27

## Index

- Data Impact Analysis 512
- data item
  - move entity 126, 180
  - namespace 126, 180
- Data Lineage Analysis 512
- data source
  - create 476
  - properties 476
- data type
  - custom mapping 443
- database
  - connecting to 18, 19, 21, 24, 26, 27
  - size 320
  - SQL query 28
- DBMS
  - connecting to 18, 19, 21, 26, 27
  - logical model 435
  - merge 226
  - preserve options 436
- DBMS definition files 272
- default
  - font in report 404
- default diagram
  - package 45
- delete
  - branch 330
  - document 334
  - folder 334
  - object 124
  - option 124
  - symbol 124
  - temporary protection 302
  - user 536
  - version 334
- .delete macro 151
- Delete Impact Analysis 512
- deleting
  - cell's document (framework matrix) 61
  - node's document (framework diagram) 61
- demo 31
- dependence link
  - external 106
  - internal 106
- dependency 106
  - extended influences 106
  - inherited by 106
  - inherits from 106
  - model 106
  - shortcut 106, 468
  - update from repository 106
- dependency link
  - properties 82
  - rebuild 52
  - view 52
- dependency matrices
  - dependency paths 182
- dependency matrix 180, 183, 431
  - in reports 390
- dependency matrix report items
  - adding 390
  - formatting 390
- dependency paths 182
- developer 6
- diagram 3, 35, 430
  - convert to package 177
  - create 169
  - create from a diagram 169
  - create from selection 169
  - create from the Browser 169
  - create from the model node 169
  - create traceability link 431
  - default 170
  - define 169
  - delete 173
  - display preferences 206
  - drag and drop 122, 178
  - find object symbol 172
  - find symbol 198
  - move 178
  - new 169
  - open 170
  - print 173
  - property 170
  - related 172
  - symbol 192
  - window 3
- Diagram action (framework diagram) 67
- Diagram action (framework matrix) 67
- diagram report items
  - adding 384
  - formatting 384
- dialog box 256
- dimension
  - mapping 483
- direct connection 12
- display
  - shortcut 461
  - symbol 185

- display preferences 206, 249
    - attribute 215
    - collection 216
    - content 210
    - customizing symbol content 213
    - exclusive choice 213, 217
    - format 212
    - general settings 208
    - shortcut 461
  - document
    - check in 293
    - check in multiple 295
    - check out 312
    - check out multiple 313
    - delete 334
    - deleting from cell 61
    - deleting from node 61
    - external application 301
    - lock 321
    - properties 287, 289
    - status 35, 287
    - temporary protection 302
    - version 320
  - document status
    - changes on server 35
    - local and server changes 35
    - local changes 35
    - locked 35
    - up to date 35
  - documentation 31
  - drag and drop 122
    - create external file 134
    - create replication 122
    - create shortcut 122
    - diagram 122, 178
    - open contextual menu 122
    - result list 122
    - Shift + alt 122
    - tree view 122
    - use 122
  - draw shapes 203
- E**
- eclipse
    - find in diagram 247
    - model object properties 247
  - Eclipse
    - generate Java code 241
    - generate project files 241
    - model 240
    - PowerDesigner perspective 237
    - preferences 239
    - project 240
    - toolbars 239
    - window menu 239
  - Eclipse plugin 237
    - limitation 237
  - Eclipse preferences 239
  - edit
    - symbol 186
  - edit in place
    - symbol 89
    - word wrap 89
  - effective permission 534
  - ellipse 203
  - embedding resource files 274
  - emergency user 538
  - EMF (Enhanced Metafile) 218
  - enable links to requirements 105
  - encryption 569, 573
  - enforce dependencies 166
  - Enhance Data Type Mapping 443
  - enterprise glossary 541
  - enterprise library 541
  - entity
    - move 126, 180
    - namespace 126, 180
  - error 137
  - Excel
    - importing objects 91, 94, 96
  - exclusive choice 213, 217
  - export
    - image 218
    - Troux Upload XML format (TUX) 168
  - exporting
    - extension files 278
    - extensions 278
  - extended attribute 154, 430
    - adding 154
  - extended attribute in list item 409
    - Display All 409
    - Display only modified ones 409
  - extended collection 402, 430
  - extended collections
    - adding 157
  - extended dependency 430
  - extended link 141
    - properties 136

## Index

- extended matrix 169
- extended model definitions
  - See extension files
- extended object 141
  - properties 136
- extended sub-object
  - properties 136
- extension
  - attach to new model 11
  - in report 379
  - merge 226
- extension files 272, 275
  - attaching to a model 277
  - conflict resolution 275
  - creating 276
  - embedded 277
  - exporting from a model 278
  - shared 277
  - See also extensions
- extensions 275
  - attaching to a model 277
  - dependency matrices 182
  - exporting from a model 278
  - Generation category 275
  - object generations 487, 495
  - Profile category 275
  - XML imports 97, 484, 495
- external application 301
- external link retrieved with repository 106
- extract dependencies 453

## F

- fact
  - mapping 483
- file 142
  - model 43
- File action (framework diagram) 72
- File action (framework matrix) 72
- file document
  - properties 82
- file object
  - attach to a PowerDesigner object 136
  - create 134
  - define 134
  - open 134
  - properties 135
- fill 193
- filter
  - define 111, 113
  - expression 111, 113, 116
  - list 111, 113
  - operator 116
  - tools 111, 113
  - wildcards 116
- find
  - graphical synonym 199
  - object 127
  - object symbol in diagram 172
  - objects 128
  - regular expression 104
  - symbol in diagram 198
- find in diagram
  - eclipse 247
- find objects 35
  - check out 332
  - display properties 332
  - model 332
  - Result list 332
- floating license 28
  - mobile 31
- folder 3, 35
  - add item 42
  - create 42
  - create configuration 325
  - create item 42
  - delete 42, 334
  - drag and drop 42
  - integrate 328
  - repository 288
- font 193, 262
  - report 405
  - symbol 193
- footer
  - modify in RTF report 395, 412
- .foreach\_part macro 152
- format 212
  - border 405
  - list item 409
  - naming template 146
  - report 405
  - report item 405
  - text 405
  - title 405
- forward mapping 490
- framework
  - introduction 47
  - template 78

- framework diagram
  - adding documents 59
  - completing 56
  - creating 63
  - creating documents 59
  - decomposing nodes 64
  - design mode 63
  - floating list 62
  - navigating 59
- framework diagram action
  - General tab 86
- framework matrix
  - adding documents 59
  - completing 56
  - creating 64
  - creating documents 59
  - design mode 63
  - floating list 62
  - navigating 59
  - properties 83, 84
- framework matrix action
  - General tab 86
- free model 219
- free text
  - format 204
  - graphic shape 204
  - notes 204
  - plain text 204
  - RTF 204
- freeze
  - temporary protection 302
  - undo check in 302

**G**

- general option for spell checker 153
- general options 255
  - add-ins 262
  - define default font 262
  - dialog box 256
  - lists 256
  - named path 259
  - New Model dialog 264
  - property sheet 256
  - repository 265
  - shortcuts 256
  - text editors 258
- General Options 249
- general preference profile 566
- general preferences profile 560, 566
  - applying 250

- general settings 208
- generate
  - artifact 160
  - DBMS preserve options 436
  - Eclipse Java code 241
  - Eclipse project files 241
  - files 160
  - from existing report 377
  - model 430
  - object 430, 448–450
  - options 436
  - PDM to PDM 435
  - replica 470
  - shortcut 470
  - shortcut models 436
  - target models 436, 470
  - transformation 442
- generated as 453
- generated files tab 166
- generation 429
  - object 447
- Generation category 275
- generation dependencies 450
- generation link 430, 450
- generation links viewer 431
- Generation Links Viewer 450
- Global Impact Analysis 512
- Global Impact Analysis rule set 331
- Global Lineage Analysis 512
- Global Lineage Analysis rule set 331
- Global Unique ID 43
- glossary 143, 541
  - autocompletion 37
  - Browser 36
  - categories 545
  - check in 546, 548
  - checking 547
  - compliance 142
  - conversion table 146
  - deploy 546, 548
  - find 127
  - glossary terms list 546
  - import terms from another glossary 544
  - import terms from Excel/CSV 545
  - import terms from model 544
  - model options 549
  - properties 548
  - term 37
  - term properties 39

## Index

- glossary model (GLM) 541
- glossary terms list 546
- granted permission 534
- graph
  - format 409
  - frame options 409
  - report 409
  - zoom options 409
- graphical synonym
  - create 199
  - find 199
  - link object 199
  - object 199
- group
  - create 531
  - insert into group 532
  - insert user 532
  - member of groups 532
  - permissions 531
  - profiles 566
  - user members 532
- GTL
  - converting names and codes 150
  - deleting substrings 151
  - iterating over parts of a string 152
  - replacing substrings 151
- GTL macros
  - .convert\_code 150
  - .convert\_name 150
  - .delete 151
  - .foreach\_part 152
  - .replace 151
- GUID 43

## H

- header
  - modify in RTF report 395, 412
- help
  - MetaModel Objects Help 99, 106
- HTML report
  - charset 423

## I

- IAM
  - analysis object 509
  - custom checks 510
  - display preferences 509

- properties 509
- IAM (Impact Analysis Model) 507
- image
  - browse 200
  - export 218
  - import 218
  - manage collections 200
  - search 200, 202
  - select 200
- impact analysis 429, 431, 499
  - analysis rule 512
  - branch 518
  - check out dependencies 511
  - compare analysis 510
  - default collections 506
  - generated models 453
  - IAM 507
  - limitations in repository 518
  - modify 502, 507
  - preview 502
  - print 510
  - repository 331
  - repository rule sets 517
  - rule set 512
  - shortcut 518
  - user-defined action 515
- Impact Analysis Model 507
- impact analysis rule set
  - create 515
- impact and analysis rule sets 272
- impact and lineage analysis
  - PowerDesigner Portal 341
- import
  - Excel file 91, 94, 96
  - image 218
  - model 241
  - XML file 97
- integrate
  - model, project, or folder 328
- interactive update 299
- intermodel generation 470
- item
  - select from a tree 121

## J

- JDBC connection profile 26
- JPEG 218

**K**

keyboard arrow to move symbol 191

**L**

layout

- card 410
- list item 409

LDAP

- controlling repository access 524
- user 530

LDAPS

- importing certificate in Java 360

library 39, 541

- check in models 549
- creating replica from 40
- creating shortcut from 40
- permissions 551
- resource files 551
- reusing object from 40
- sharing model category set 559
- synchronization 15

license file

- troubleshooting 31

license management

- floating license 31
- mobile 31
- troubleshooting 31

license management wizard 29

licenses 28, 29

licensing

- Sybase Workspace 29

limitation

- package synchronization 242

line 203

line style 193

lineage analysis 499

- analysis rule 512
  - check out dependencies 511
  - compare analysis 510
  - default collections 506
  - IAM 507
  - modify 502, 507
  - preview 502
  - print 510
  - repository 331
  - rule set 512
- lineage analysis rule set
- create 515

link

- automatic completion 192
- automatic routing 208
- bend 187
- change symbol 187
- create 89
- intersection bridges 208
- polyline 204
- reroute link 208

link (framework diagram)

- properties 88

link models 429

link object

- create from the Browser 90
- create in list 91
- graphical synonym 199

linking 430

list 3

- add item 117
- arrange 117
- column order 113
- customize columns 113
- dialog box 108
- display columns 113
- filter 111, 113, 116
- include shortcuts 118
- include sub-objects 118
- item 409
- modify 108
- position 117
- select items 118
- target models 469
- tools in the list toolbar 108
- U column 116
- validate 108

List action (framework diagram) 68

List action (framework matrix) 68

list item

- attribute 409
- column 409
- default order 409
- extended attributes 409
- format 409
- Layout menu 409

List of Change Lists 309

list report

- .LRT file 375
- create 370
- definition 363

## Index

- export file 375
- generate .CSV 375
- generate .HTML 375
- generate .RTF 375
- generate .XLS 375
- generate .XML 375
- import file 375
- List Report Wizard 370
- properties 373
- result set 363
- list report items
  - adding 382
  - formatting 382
- List Report Wizard 370
- liste 256
- lists
  - adding 157
- local and server changes 35
- local changes 35
- Local Document 297, 315
- local license 28
- lock
  - add configuration 321
  - add related models 321
  - all document versions 321
  - multiple documents 321
  - repository document version 321
  - temporary protection 302
  - undo check in 302
- lock all documents 321
- locked 35
- log of repository activities 536
- logical model 435
- M**
- manage
  - lock 321
- manage all documents 536
- manual correction (check model) 139
- manual synchronization 232
- mapping 430
  - attribute to element 479
  - column to element 479
  - create with drag and drop 479
  - create with the Mapping Editor 479
  - creating from property sheet 491
  - operational to warehouse 483
  - properties 493
- mapping (OOM)
  - association 481
  - class 481
  - SQL queries 481
- mapping (PDM)
  - dimension 483
  - fact 483
- mapping editor 431
- Mapping Editor 487, 495
  - automatic mapping 479
  - create data source 476
  - creating mappings 477
  - generate default mapping 479
  - interface 477
  - multi-select sources 479
  - object 479
  - sub-object 479
  - tools 489
  - XML imports 484
- mappings
  - metamodel 484, 487
  - metamodel objects 497
  - properties 495
- Matrix action (framework diagram) 74
- Matrix action (framework matrix) 74
- mcc (model category sets) 272
- menu
  - customize 270
- merge
  - break comparison links 232
  - check out model 316
  - filter 232
  - general option 316
  - models 226
  - repair broken comparison links 232
  - select action 226
  - synchronize manually 232
- metamodel objects
  - properties 497
- MetaModel Objects Help 99, 106
- Microsoft Analysis Services 262
- Microsoft Word Import Export 262
- mobile mode 31
  - borrow license 31
  - return license 31
- model 3, 35, 89
  - check 137
  - check out a package 317
  - check out with merge 316
  - close 43
  - compare 223, 232



- comparison options 230
  - create 9, 43
  - create from template 9
  - delete 43
  - display preferences 206
  - Eclipse 240
  - enterprise reference model 39
  - file 43
  - find objects 128, 332
  - free model 219
  - generated as 106
  - generated from 106
  - generation options 436
  - import 241
  - include objects 118
  - integrate 328
  - list 108
  - merge 226
  - namespace 46
  - object 3
  - open 43, 241
  - open as read-only 43
  - options 143
  - preview code 102
  - rename 43
  - report 363, 377, 415
  - save 43
  - save all 43
  - template 11
  - validate 137
  - Model action (framework diagram) 66
  - Model action (framework matrix) 66
  - model category set
    - adding a diagram template 557
    - adding a model template 558
    - creating 555
    - creating models 553
    - General Options 554
    - selecting 554
    - sharing via the Library 559
  - model category sets 272
  - model document
    - properties 82
  - Model Explorer (Eclipse view) 237
  - model generation 430
  - Model Generation action (framework diagram) 70
  - Model Generation action (framework matrix) 70
  - model object properties
    - eclipse 247
  - model options
    - glossary 549
  - Model Options 249
  - model template 11
  - modeling 3
  - models
    - compare 333
    - duplicating 301
  - modification date 106
  - move
    - diagram 178
    - drag and drop 122, 178
    - entity 126
    - linking object 126, 178
    - object 126
  - move objects
    - from package to package 126
  - Move to Project Directory 49
  - multi DBMS environment 435
  - multi-model report 363, 431
  - Multi-Model Report Editor 398
  - multimodel report
    - add section 376
    - create 376
    - edit 377
- ## N
- name property
    - .convert\_name macro 150
    - converting in GTL 150
  - name to code conversion 146
  - named path
    - create 259
  - namespace
    - data item 126, 180
    - entity 126, 180
    - identify object 107
    - model 46
    - package 45, 46
  - naming convention 146
  - naming conventions 143
    - glossary 143
    - template 146
  - naming template
    - format 146
  - native connection profile 25
  - Navigator (Eclipse view) 237
  - new
    - diagram 169

## Index

- New Model dialog
  - customizing 264
- node (framework diagram)
  - contextual menu 63
  - properties 84
  - specifying actions 65
- node (framework)
  - decomposed 64
- note
  - attach to an object 101

**O**

- O/R mapping 481
- object 89
  - adding attributes to 154
  - advanced generation 449
  - artifacts tab 160
  - attach a requirement 105
  - attach notes 101
  - copy 123
  - create from the Browser 90
  - create in list 91
  - customize 154
  - customizing property sheet 158
  - delete 124
  - dependencies 106
  - display preferences 206
  - drag and drop 122
  - extended attributes 154
  - extending 154, 158
  - find 127
  - generate 449, 450
  - generation 447, 448
  - graphical synonym 199
  - identify 107
  - list 108
  - mappings property sheet 493
  - move 126
  - move between packages 126, 177
  - move diagram to package 178
  - move with links 126, 177, 178
  - non-oriented link 126, 177, 178
  - oriented link 126, 177, 178
  - paste 123
  - properties 98, 332
  - property sheet 98
  - replicate 463
  - result list 127
  - reusing 40

- shortcut 457
  - simple generation 448
- Object Constraint Language 131
- Object Expression Editor 493
- object generation 430
- Object Generation action (framework diagram) 71
- Object Generation action (framework matrix) 71
- object generations
  - initialization scripts 495
  - mapping properties 495
  - mappings 487
  - post-processing scripts 495
- object language
  - merge 226
- object language definition files 272
- object permission profiles 272
- object permissions profile 560, 566
  - examples 564
- objects
  - adding extended collections to 157
  - adding lists to 157
  - extending 154, 159
- OCL 131
- ODBC 18, 19, 27
  - administrator 19
- open
  - model 241
  - related diagram 172
- operational to warehouse mapping 483
- operator 116
- option
  - auto-connect 17
  - delete 124
  - environment variables 259
  - merge models 316
  - model 143
- origin object 106
- outline view 247
- output
  - window 3
- Output 268

## P

- package 3, 35
  - check in 301
  - check out 317
  - create 45
  - default diagram 45
  - define 44

- diagram type 45
  - hierarchy 44, 379, 399
  - include objects 118
  - list 108
  - move diagram 178
  - move object 126, 177
  - namespace 45, 46
  - parent 170
  - permissions 301
  - property 45
  - shortcuts 317
  - use parent namespace 46
- page
  - print 173
- page setup 175
- parent namespace 46
- password 527, 528
  - change 17
  - encryption 569, 573
  - user 529
- password policy 17, 528
- paste
  - as replica 463
  - as shortcut 123, 457
  - conflict 123
  - object 123
- paths
  - specifying for resource files 272
- PDM
  - logical model 435
- permission
  - copy permissions to all children 534
  - effective 534
  - granted 534
  - group 531
  - list 534
  - package 301, 317
  - read 534
  - repository 534
  - user 529
  - write 534
- permissions
  - branch 327
  - library 551
- perspective
  - PowerDesigner 237
- PNG (Portable Network Graphic) 218
- polyline
  - create link between any symbol 204
- PowerDesigner
  - Browser 3
  - canvas 3
  - diagram 3
  - diagram window 3
  - documentation 31
  - drag and drop 122
  - Eclipse plugin 237
  - encryption 570
  - folder 3
  - list 3
  - model 3
  - model object 3
  - modeling 6
  - modeling environment 3
  - options 255, 256
  - output window 3
  - package 3
  - property sheet 3
  - report 3
  - result list 3
  - securing 569
  - security 570
  - video 31
  - window 268
  - workspace 3, 42
- PowerDesigner perspective 237
- PowerDesigner Portal 12, 285, 337
  - client settings 353
  - color theme 354
  - comparing models 341
  - creating a group 350
  - creating a user 349
  - deleting a group 352
  - deleting a user 352
  - document properties 339
  - editing object properties 342
  - groups 349, 351
  - impact and lineage analysis 341
  - keystore 572
  - LDAPS 360
  - logging in 337
  - repository explorer 338
  - rights 350
  - search 344, 345
  - security 572
  - server settings 355
  - settings 353
  - SSL 571

## Index

- subscriptions 340
- users 349, 351
- PowerDesigner Scripting Object Help 31
- ppf (object permission profiles) 272
- prerequisites 164
- preserve
  - database object 436
- preserve shortcut link 436
- preview
  - comparison 233
  - List tab 505
  - report 397, 413
  - search 397, 413
- preview code 102
- print
  - diagram 173
  - option 174
  - page scale 173
  - report 415
  - selected pages 173
  - selected symbols 173
- process language
  - merge 226
- process language definition files 272
- profile
  - See extension files
- Profile category 275
- project 35
  - add documents 49
  - cell check 55
  - check 55
  - check in 292
  - check out 312
  - create configuration 325
  - creating 48
  - creating from repository documents 51
  - creating model 49
  - display preferences 53
  - Eclipse 240
  - file check 55
  - integrate 328
  - introduction 47
  - model check 55
  - node check 55
  - object 50
  - opening documents 52
  - properties 81
  - template 78
- project diagram 50, 431

- Project Documents 297, 315
- project template 78
- property
  - add 154
  - compare between objects 223
  - object 98
  - package 45
  - replication 464
  - shortcut 459
- property sheet 3, 256
  - customize 99
  - customize tab 158
  - dependencies 106
  - Dependencies tab 98
  - extended attribute 154
  - find object symbol 172
  - General tab 98
  - Notes tab 98
  - Rules tab 98
  - Traceability Links tab 98
  - version info 106
  - Version Info tab 98
- proxy connection 12, 14

## R

- read-only
  - model 43
- Rebuild Dependency Links 52
- recovery backup file 255
- rectangle 203
- referencing model 455
- refresh source code 244
- regular expression for text search 104
- rejecting change lists 307
- related diagram 172, 430
- related term
  - create 541
- relational to multidimensional mapping 483
- .replace macro 151
- replica
  - create 463
  - creating from library object 40
  - dependencies 468
  - desynchronize attributes 464
  - display 465
  - generate 470
  - preserve through generation 470
  - shortcut 468

- replication 142, 430
  - compare 467
  - display 465
  - drag and drop 122
  - merge 467
  - properties 464
- report 3
  - add item 399
  - calculated collection 402
  - copy item 401
  - create 363
  - create from List of Reports 369
  - default format 405
  - define default font 404
  - depth level 401
  - edit 377
  - extended collection 402
  - filter criteria 393
  - font 405
  - generate from preview 397, 413
  - generate to HTML 415
  - generate to RTF 415
  - global object selection 403
  - graph 409
  - hierarchy 401
  - HTML presentation template 424
  - language 418
  - model 363
  - multi-select items 399
  - multimodel report 376
  - no paragraph numbering 418
  - object properties 396
  - object selection in report items 393
  - outline 401
  - position item 401
  - presentation template 415
  - preview 397, 413
  - print 415
  - properties 418
  - quick generation 377
  - refine object selection 403
  - report model 363
  - report template 369
  - Report Wizard 364
  - RTF presentation template 424
  - save 363
  - select object 403
  - sort criteria 393
  - title page 418
  - upgrading legacy reports 414
  - variables 396
- report editor 3
- Report Editor 363, 377, 398
- report item
  - book 399
  - chart 386
  - chart report item 386
  - examples 386
  - format 391, 405
  - independent 399
  - model-dependent 399
  - object list 399
  - object-dependent 399
  - title 394, 402
  - type 399
- report items
  - book 379
  - card report items 382
  - chart 379
  - chart report items 384
  - dependency matrix report items 390
  - diagram report items 384
  - list 379
  - list report items 382
  - text report items 381, 383
- report language
  - merge 226
- report language files 272
- Report menu
  - List Report Wizard 370
- report template 417
  - create 417
  - create from a multimodel report section 418
  - create from a report section 418
  - editor 3
  - language 417
  - modify 418
  - save 417
- report templates 272
- Report Wizard
  - calculated collection 402
  - extended collection 402
  - templates 364
- reports
  - add item 379
  - book report items 381
  - card report items 382
  - chart report items 384

## Index

- dependency matrix report items 390
- diagram report items 384
- extension 379
- list report items 382
- report item 379
- text report items 383
- repository 3, 285
  - access permission 534
  - Active Directory 524
  - activity 536
  - analysis rule sets 517
  - approving change lists 307
  - auto-connect 17, 265
  - branch permissions 327
  - browser 287, 289
  - bytes per char 13, 265
  - change lists 303
  - change password 17
  - check in 291
  - check out dependencies 511
  - checking resource files into 272
  - comparing resource files 272
  - connect 15
  - create branch 325
  - create user 529, 530
  - data consistency 287
  - data integrity 287
  - database size 320
  - deactivate user 536
  - definition 13, 14
  - delete document 334
  - delete folder 288, 334
  - delete user 536
  - delete version 334
  - direct connection 12, 13
  - disconnect 15
  - duplicating models in 301
  - emergency user 538
  - find objects 128, 332
  - folder 288
  - general options 17, 265
  - group 531
  - impact analysis 331, 518
  - integrate 328
  - LDAP 524
  - lineage analysis 331
  - list of activities 536
  - moving a document 303
  - password 528
  - password policy 528
  - PowerDesigner Portal 337
  - proxy 287
  - proxy connection 12, 14
  - purpose 287
  - query 538
  - rejecting change lists 307
  - returning change lists for revision 307
  - reviewing change lists 306
  - shared data 287
  - SMTP server 527
  - submitting a change list 305
  - teamwork 287
  - temporary protection 302
  - test definition 13, 14
  - updating resource files from 272
  - user 536
  - user rights 533
  - web access 12
- Repository
  - Browser 41
- repository definition
  - ADMIN 13, 14
- Repository Document 297, 315
- requirement
  - attached to an object 105
  - external shortcut 105
  - open shortcut property sheet 105
  - open target object property sheet 105
- reroute link 208
- resize
  - symbol 186
- resource
  - merge 226
- resource editor
  - See also resource files
- resource files
  - checking into the repository 272
  - comparing with the repository 272
  - conversion tables 272
  - copying 274
  - creating 274
  - csv (conversion tables) 272
  - DBMS definition files 272
  - directories, specifying to search 274
  - embedding 274
  - extension files 272
  - impact and analysis rule sets 272
  - mcc (model category sets) 272

- model category sets 272
  - object language definition files 272
  - object permission profiles 272
  - paths 272
  - ppf (object permission profiles) 272
  - process language definition files 272
  - report language files 272
  - report templates 272
  - repository 272
  - rtp (report templates) 272
  - rul (impact and analysis rule sets) 272
  - searching directories 274
  - shared via library 551
  - sharing 274
  - updating from the repository 272
  - upf (user profiles) 272
  - user profiles 272
  - xdb (DBMS definition files) 272
  - xem (extension files) 272
  - XML language definition files 272
  - xol (object language definition files) 272
  - xpl (process language definition files) 272
  - xrl (report language files) 272
  - xsl (XML language definition files) 272
  - result list 3
    - drag and drop 122
    - find object symbol 172
    - manipulate objects 127
  - Result list
    - find tab 332
  - Result List 268
  - result set
    - define 374
    - generate 374
    - preview 374
    - print 374
    - properties 374
  - return mobile license 31
  - returning change lists for revision 307
  - reuse object 40
  - reverse mapping 490
  - reviewing change lists 306
  - right
    - freeze versions 320
    - user 533
  - root
    - browser 290
  - RTF editor
    - open RTF file 101
    - open text file 101
  - rtp (report templates) 272
  - rul (impact and analysis rule sets) 272
- ## S
- SAP platform
    - Business Suite 32
    - BusinessObjects 32
    - HANA 32
    - NetWeaver BPM 32
    - overview 32
    - Solution Manager 32
  - save
    - model 43
    - report 363
    - workspace 42
  - Script action (framework diagram) 75
  - Script action (framework matrix) 75
  - search in preview 413
  - search in report preview 397
  - section
    - add to multimodel report 376
  - security 569
    - encryption 570
  - select
    - all symbols 186
    - connected symbols 186
    - symbol 186
    - target model 470
  - Select Image 200
  - selection
    - confirm 403
    - type 403
  - selection tree
    - select items 121
  - shadow 193
  - shape
    - draw 203
  - sharing resource files 274
  - shortcut 256, 429, 430, 436
    - card 379, 399
    - change target 469
    - change target object 459
    - create 123, 457
    - creating from library object 40
    - dependencies 106, 468
    - display preferences 461
    - drag and drop 122
    - external 455

## Index

- generate 470
- impact analysis 518
- internal 455
- list 461
- list of target models 469
- preserve through generation 470
- properties 459
- synchronize 467
- shortcut keys 279
- shortcut of package 317
- show
  - all parent groups 532
- show symbol
  - in diagram 192
- size 193
  - database 320
- SMTP server 527
- spell checker 153, 262
  - add to custom dictionary 153
  - code page 153
  - custom dictionary 153
  - enable 153
  - general option 153
  - MS Word 153
- SQL
  - repository 538
- SQL queries
  - mapping 481
- SQL query
  - execution 28
- square 203
- SSL 571
- standalone seat 28
- stereotype 431
  - traceability link 431
- strings
  - .foreach\_part macro 152
  - iterating over in GTL 152
- style sheet
  - structure 424
- sub-diagram in decomposed object symbol 198
- sub-object
  - mappings property sheet 493
- sub-replication
  - desynchronize 464
- subscriptions 340
- substrings
  - deleting in GTL 151
  - replacing in GTL 151

- SVG (Scalable Vector Graphics) 218
- Sybase Workspace
  - licensing 29
- symbol
  - align 191
  - auto-layout 190
  - content 193, 210
  - custom shape 193
  - delete 124
  - display 185, 192
  - display preferences 206
  - edit 186
  - edit in place 89
  - fill 193
  - font 193
  - hidden 192
  - line style 193
  - locate in diagram 198
  - manipulate 188
  - modify 185
  - move with keyboard arrows 191
  - print 173
  - resize 186
  - select 186
  - shadow 193
  - show in diagram 192
  - size 193
  - text alignment 193
- synchronization
  - activate synchronization 242
  - deactivate synchronization 247
  - example 244
- synchronize
  - shortcut 467
- synchronizing 430
- synonym
  - create 541
  - properties 39, 547
- sysam.properties 31
- system add-in 262

## T

- tab
  - favorite 99
- table
  - column 409
  - default 409
- table of contents
  - limit depth level 405



- target model 436, 455
    - change 469
    - list 469
    - unresolved 469
  - target object 455
    - change 459
  - team leader 6
  - template
    - artifact 164
    - create model 9
    - creating for resource 559
    - model template 11
    - naming conventions 146
    - report 417
  - temporary protection 302
    - bypass 302
    - document 302
  - term
    - create 541
    - properties 39, 547
  - tester 6
  - text 203
    - align 193
    - edit 408
    - font 405
    - format 405
    - title 405
  - text alignment 193
  - text editor
    - defining 258
  - text report items
    - adding 383
    - formatting 383
  - title 203
    - format 405
    - removed from report 411
    - report item 394, 402
    - text 405
  - Tomcat
    - SSL 571
  - toolbar 269
    - customize 89, 270
    - Eclipse 239
    - toolbox 89
  - toolbox
    - customize 270
    - toolbar 89
  - Toolbox 268
  - traceability link 430–433
    - create in diagram 431
    - stereotype 431
  - transformation
    - add in menu 167
    - apply 167
    - command 167
    - generate 442
  - tree view
    - diagram 170
    - drag and drop 122
  - trial version 28
  - troubleshooting license management 31
  - Troux Upload XML format (TUX)
    - exporting objects 168
- ## U
- UI preference profile 565
  - UI preferences profile 560, 566
  - UI profile
    - applying 250
  - undo check in 302
  - unfreeze
    - version 318
  - up to date 35
  - upf (user profiles) 272
  - use parent namespace 46
  - user
    - deactivate 536
    - insert into group 532
    - password 529, 530
    - permissions 529, 530
    - profiles 566
    - repository 529, 530, 536
    - rights 533
  - user add-in 262
  - user profile
    - adding to install image 254
    - applying 250
    - copy preferences from a model 253
    - creating 251
    - display preferences 249
    - General Options 249
    - List of User Profiles 251
    - Model Options 249
    - Resource Editor 253
    - updating 252
  - user profiles 272
  - user-defined action 515

## Index

### V

- validate model 137
- variable option 259
- VB .NET artifacts 160
- version
  - check out from configuration 325
  - delete 334
  - locks 321
  - manage 320
  - unfreeze 318
  - updatable 320
  - user right 320
- version info 106
- video 31
- view
  - manage 268
  - outline 247

### W

- warning 137
- web access 12
- web browser 337
  - keystore 572
  - security 572
- Welcome page 4
- wildcard 116
- window
  - manage 268
- window menu (Eclipse) 239
- WMF (Windows MetaLayout Format) 218
- word wrap
  - code 89
  - name 89
- workspace 3, 42
  - change 42

- delete 42
- open 42
- save 42

### X

- xdb (DBMS definition files) 272
- xem (extension files) 272
- XEM (extension)
  - missing 279
- XML
  - add-in 262
  - extensions for importing 97
  - importing file as model 97
  - importing objects from 484
- XML imports 97, 219, 220
  - initialization scripts 495
  - mapping properties 495
  - mappings 484
  - post-processing scripts 495
- XML language
  - merge 226
- XML language definition files 272
- XML validation 262
- xol (object language definition files) 272
- XPATH expression 493
- xpl (process language definition files) 272
- xrl (report language files) 272
- xsl (XML language definition files) 272
- XSM
  - customizing generation 445

### Z

- zoom for graph 409