Enterprise Architect

User Guide Series

Collaborative Modeling

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Collaborative Modeling

Enterprise Architect allows any number of people to work on models and diagrams simultaneously, in a cooperative and team effort. The powerful suite of Collaboration tools - introduced in the *Available Facilities* table - ensure that communications concerning elements, diagrams, lists and matrices are available in the model alongside those objects, and links can be created between the communications and the objects via those tools.

The 'Collaborate' panel in the Enterprise Architect Start ribbon conveniently brings these tools together, ensuring that you are informed about what you need to attend to and made aware of information that is important to your role. The 'Support Collaboration' option in a diagram's properties also keeps you in the flow of a Chat conversation with a user or user group, or a Discussion concerning an element, whilst you are modeling in diagrams.

Available Facilities

Facility	Description

Review Elements	These elements enable you to define a formal review of a part of the model, in particular a small number of elements and/or diagrams. Each element enables you to define when the review should start and end, and which members of the team are responsible for performing the review. Apart from the Review elements themselves, you use these windows to set up and manage reviews: • The **Collaborate window** at the 'Review' tab, on which you can join a review and create new discussion points or responses within that review, on any element or diagram • The Reviews view, listing all current and recent reviews of elements • The **Collaborations window** at the 'Reviews' tab, showing the elements included in a selected review; you can switch to the 'Review' tab of the Collaborate window to show the details of a selected element under review
Discussions	**Discussions** are grouped threads of conversation concerning an element or diagram in the model. One user creates a topic of discussion on an object, other

	users reply to that topic and to each other's responses, and so a conversation develops. Discussions are created and managed through these facilities: • The **Collaborate window** at the 'Discuss' tab, on which you can create a new discussion or add to an existing discussion on a specific element or diagram • The **Collaborations window** at the 'Discussions' tab, on which you can review the various discussions of elements recorded in the model, for Today, Yesterday, This Week, Last Week, This Month and Last Month • The Recently Discussed Elements report, which presents elements that have been the subject of discussion in the last 7 days (by default; you can change the number of days in the 'Search Term' field)
Chats	Chats are informal conversations between team members identified by either their user ID or a Group name. The conversations are not directly linked to any model structure, and can concern any subject in or outside the model.

Comments	Comments are unstructured, ad-hoc notes or reminders lodged against specific elements by any user. The user can create a comment or add to or edit an existing comment, or remove the comment.
Journal	Enterprise Architect provides a great facility for maintaining a daily journal. You can record all kinds of ideas, comments, notes, suggestions, events, to-do lists and other reminders of what you have done or intend to do within the model. This is a great way to keep the momentum flowing day to day. The facility is simple to use, allowing you to quickly jot down your thoughts as they occur to you.
Team Library	Within the Library you can review and add to a hierarchically-structured repository of comments, reports, reviews and documents on any feature or aspect of the project or related projects.
Mail	The **Model Mail** facility provides you with the ability to send, receive and respond to emails within the project team, under your User Security ID, either as an individual user or as a member of a group

	that has a shared mail inbox.
Calendar	The Project Calendar allows the team members to record scheduled meetings and reminders of events for today or any day in the future, and to check for such events falling due.
Personal Kanban Diagram	Within the extensive Kanban facilities, each user can identify their personal Kanban diagram and display it as a default diagram.
Personal Gantt Chart	The Gantt chart facilities include an extracted chart for each user, listing tasks and showing status as completed or incomplete.

Collaboration in Diagrams

Enterprise Architect has an additional feature that enables you to work on sections of your model in diagrams, and be notified on the diagram of any posts in relevant **Discussions** or Chats concerning the elements you are working on. A floating toolbar against the elements also enables you to instantly access various tabs of the **Collaborate window** and the 'Model Message' dialog, displaying posts and messages concerning the selected element. For more information, see the *Collaboration in Diagrams* Help topic.

Model Chat

The **Collaborate window** has a 'Chat' tab that provides an extremely useful facility of following and participating in quick conversations on a point of interest, with members of a selected user group. The user group can contain a number of users and is defined in User Security, which must be enabled in order for the Chat facility to be available.

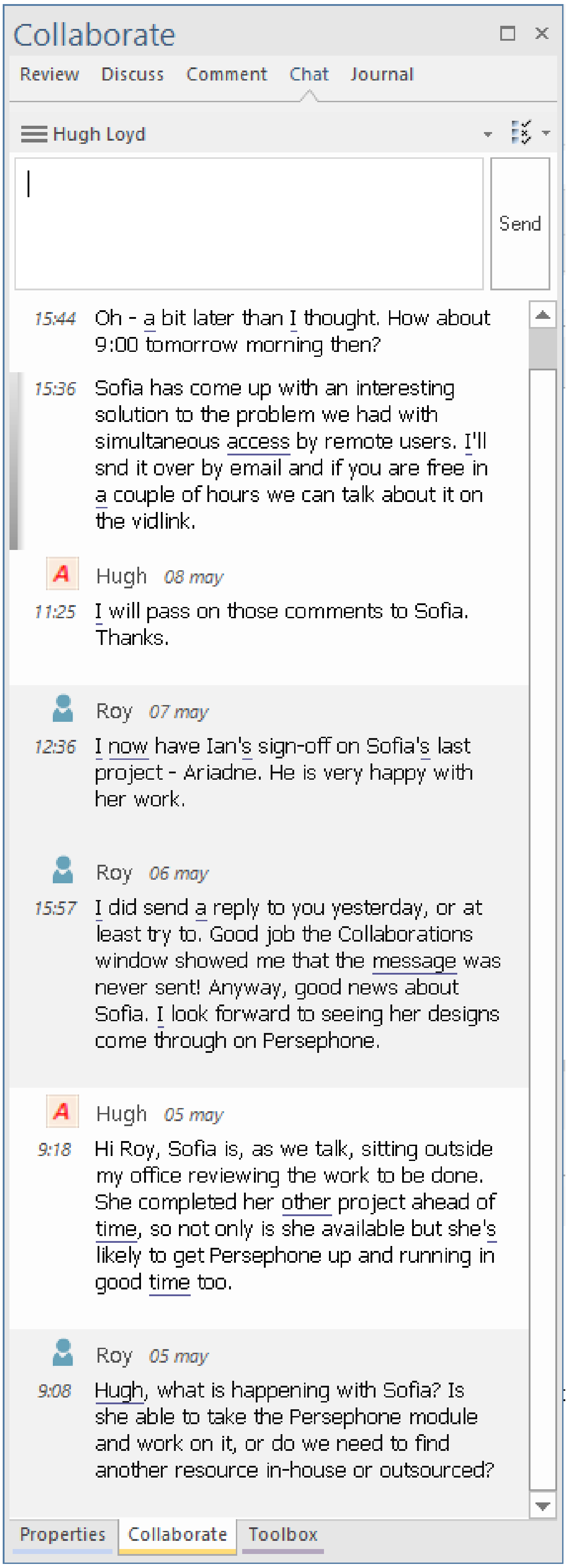
You can also select an individual user to chat with; each model user - also as defined in User Security - is nominally a Chat group of one.

Each initial comment or response is a separate message, listed in date/time order, with the most recent message at the top of the list. The messages are independent of the currently selected model object and the full list displays whenever the user group is selected in the 'Chat' tab. As the messages are independent of any model object, they do not appear in the '**Discussions**' tab (All Discussions) or 'Recently Discussed Elements' report, which are element-based.

If you simply want to make notes for yourself, you can use the 'Journal' tab on which you jot down any notes, comments, reminders or references that you want to record during the day. Alternatively, you can make similar notes about a specific element, and effectively chat with other users about that element, through the 'Comments' tab.

You can filter the messages by the time interval prior to today, and you can set up a check to notify you when new messages are posted by members of one or more user groups, including specifically-selected individual users.

This screen capture shows an example of a Chat session:


Collaborate
Review Discuss Comment Chat Journal
Hugh Loyd
Send
15:44 Oh - a bit later than I thought. How about 9:00 tomorrow morning then?
15:36 Sofia has come up with an interesting solution to the problem we had with simultaneous access by remote users. I'll snd it over by email and if you are free in a couple of hours we can talk about it on the vidlink.
Hugh 08 may
11:25 I will pass on those comments to Sofia. Thanks.
Roy 07 may
12:36 I now have Ian's sign-off on Sofia's last project - Ariadne. He is very happy with her work.
Roy 06 may
15:57 I did send a reply to you yesterday, or at least try to. Good job the Collaborations window showed me that the message was never sent! Anyway, good news about Sofia. I look forward to seeing her designs come through on Persephone.
Hugh 05 may
9:18 Hi Roy, Sofia is, as we talk, sitting outside my office reviewing the work to be done. She completed her other project ahead of time, so not only is she available but she's likely to get Persephone up and running in good time too.
Roy 05 may
9:08 Hugh, what is happening with Sofia? Is she able to take the Persephone module and work on it, or do we need to find another resource in-house or outsourced?
Properties Collaborate Toolbox

Access

Ribbon	Start > Collaborate > **Discussions** > Chat
Context Menu	**Browser window** > Right-click on element > Collaborate > Chat On diagram > Right-click on element > Collaborate > Chat
Keyboard Shortcuts	**Ctrl+9** > Chat

Select a User Group

Initially, the button at the top of the 'Chat' tab displays the name 'Select a Discussion Group'. Click on the button and:

- If you want to communicate with a group of several users, select the 'Group Chats' option and the name of the user group to send messages to
- A specific user, select the 'User Chats' option and either the name of a user you have already been chatting with previously, or the 'Select Chat Group' option to locate the specific user (on the 'Create New Discussion' dialog, click on the **With button**, double-click on the name of the user

in the displayed list, then click on the **Create button**)

The name of the currently-selected user group or user then becomes the name of the button.

If you want to communicate with a different group or user, click on the button again and select the group or user to chat to, as before.

If you do not want to continue chatting, you can select 'Disconnect from current Chat'.

Create a message

Step	Description
1	At the top of the 'Chat' tab, in the text field, type your message. You can right-click on the text and select from a number of editing context menu options, and you can create glossary terms and new elements from highlighted text, or links to existing elements. You can also paste in copied text from the clipboard, by pressing **Ctrl+V**. If you want to create a paragraph break, press **Ctrl+Enter** (the **Enter key** alone will submit the message).
	When you have completed your message,

2	click on the **Send button** or press the **Enter key**. The message displays at the top of the list underneath the text field. If you have selected to show avatars (the 'Configure > Security > Administer > User Settings > Show user avatars' ribbon option), all messages show an image representing the user who contributed that message. If a user does not have an avatar image, a default 'head and shoulders' silhouette displays as the avatar. Also, if you are chatting with members of a user group, your names are shown in full. If you are talking to a single user, only your first name displays. There might be more than one Steve or Dave in your user group, so the surnames identify which is writing. In a one-to-one Chat you specifically chose to talk to, say, Dave Brookes, so the surname is not necessary.

Review Messages

Messages you have sent or received are listed in the body of the 'Chat' tab in chronological order, with the most recent message at the top. If you post messages in succession, without response from another user, your messages are grouped together in time order with the most recent at the top, and the time it was sent on the left. If the set of messages spans more than one day, the date of posting is also displayed.

In a Chat with another individual user, the messages from each person have highlighted backgrounds, so that you can quickly see where each user's message(s) start and finish.

Once a message has been sent, it cannot be edited. If you want to re-use the text of a message item, you can copy some or all of the message to the clipboard by pressing **Ctrl+C** before you send it. You can then paste the text into a new chat item or into another document in Enterprise Architect.

You can also delete a message by right-clicking on it and selecting the 'Delete Message' option.

Messages sent by other people to the currently-selected User Group display in your screen immediately. Messages deleted by other users do not disappear immediately. To update your list, right-click on it and select the 'Reload Messages' option.

Monitor User Groups for Messages

You can set the system to monitor selected user groups, and to notify you when a member of one of those user groups posts a message whilst the 'Chat' tab is either set to a different user group or not visible. A member of the 'Administrators' user group can add themselves to any other security group and receive notifications of posts to that group.

Note that you do not have to manually set monitoring for Chat messages posted under the IDs of individual users; these are all monitored automatically.

The notification is a **Msg button** Msg that displays at the right of the application title bar when a message is posted from a monitored user group. The button also displays if a message is posted in the thread you have been reading, and the 'Chat' tab is not visible. If you still have the thread loaded in the 'Chat' tab, click on the button to redisplay the 'Chat' tab with the new message in the thread.

The Msg button also provides a menu to indicate which group has posted the new and unread message. When you click on a group in that menu, the 'Chat' tab displays with the appropriate thread of messages.

To set up a check for messages from a user group:

1. Click on the 'Options' icon on the right of the header of the 'Chat' tab, and select the 'Monitor Groups for new Messages' option.
2. Select a user group to monitor. If you want to monitor more than one group, either:
   - Do steps 1 and 2 again for each individual group to monitor, or
   - Select the 'All' group to check for messages from any

group

3. Select the 'Monitor Groups for new Messages' option again, and click on the 'Check for new Messages Every' option. Click on the interval of time at which the system will check for new messages - every minute, or up to every ten minutes.
4. If you want to cancel monitoring a specific group, repeat steps 1 and 2. Clicking on a selected group will deselect it.
5. If you want to cancel monitoring all of the selected groups, perform step 1 and then click on the 'None' option.

You can also set up a concise and very responsive mechanism on a diagram to notify you of Chat messages sent to you. For further details, see the *Collaboration Support in Diagrams* Help topic.

Filter messages by age

The 'Options' icon provides a series of options to limit the display of messages to those posted within a certain number of days prior to today's date.

You can select to display only messages posted today (the default), or within the last 3, 7, 30 or 90 days. The 'Today +' option also enables you to show postings from today and the 20 most recent postings prior to today

If you do not want to limit the display of messages to an interval you have set, you can cancel it by selecting the 'All' option.

Discussions

Using the 'Discuss' tab of the dockable **Collaborate window**, you can select an individual element or diagram and develop an informal discussion that is directly associated with that object. This makes it easy to locate, view and contribute to a discussion, or more than one discussion, on the selected object.

You can participate in discussions on different elements and diagrams simply by clicking on each object in turn; the Collaborate window immediately switches to the discussion of the new selected object, identified by name underneath the window option bar.

As a discussion develops, the number of responses is shown below the original post; therefore you can see when a discussion has a new reply without having to expand and work through the thread. You can apply a priority and status to a discussion, which helps you to indicate the importance of the discussion and to resolve and close off the points raised in the discussion so that they do not continue indefinitely. You can also delete the whole posting or specific replies, to balance retaining discussion history with removing irrelevant information.

Further facilities of the Collaborate window are the:

- 'Review' tab, which you use to attach formal discussions on one or more elements and/or diagrams to a review session, encapsulated in a Review element; see the *Reviews* Help topic

- 'Comment' tab, which allows you to maintain a running log or diary of notes, decisions and future actions on the currently-selected element; several team members can contribute to the same daily record on an element - see the *Element Comments* Help topic.
- 'Chat' tab and text box, which you can use to follow and participate in quick conversations on a point of interest, not necessarily connected with the selected element; see the *Model Chat* Help topic
- 'Journal' tab, on which you jot down any notes, comments, reminders or references that you want to write down during the day; see the *Introducing the Journal* Help topic

The discussion comments pertinent to an element can be displayed in that element on a diagram, in the 'Discussion' compartment of the element.

Access

Select an element or diagram, then open the **Collaborate window** using one of these methods:

Ribbon	Start > Collaborate > **Discussions** > Discuss
Context Menu	**Browser window** > Right-click on object > Collaborate > Discuss On diagram > Right-click on element > Collaborate > Discuss

Keyboard Shortcuts	**Ctrl+9** > Discuss

Operations in Discussions

Operation	Action
Create a discussion	The window displays the message *Create new Discussion*. Double-click on this message and type your posting as continuous text (no carriage returns). The text automatically wraps at the border of the **Collaborate window**. You can also paste copied text from the clipboard into the discussion item, by pressing **Ctrl+V**. If you do need to break your text into paragraphs, press **Ctrl+Enter** at the point at which to break the text. When you have finished typing, click off the text or press the **Enter key**. • An open expansion arrow and a  icon display to the left of your text • Your user ID and the time of posting display just underneath your text, followed by the text *0 Replies*

	• The message *Post Reply* displays below your text, and the message *Create new Discussion* displays above your text You can also right-click on the window and select the 'Create new Discussion' menu option. All new discussions are added to the top of the 'Discuss' tab. If user security is enabled and you have selected to show avatars, the discussion icon is replaced by an image representing the user who contributed that item. If a user does not have an avatar image, a default 'head and shoulders' silhouette displays as the avatar.
Monitor Discussion	Once a discussion has been started on an element, you can set a flag to notify you whenever a response is posted to the thread. To set the flag, right-click on the element name in the **Browser window** or in a diagram and select the 'Collaborate > Monitor **Discussions**' option. The flag then operates for your user ID. When a response is posted in a monitored discussion, the notification is a **Msg button**  that displays at the right hand end of the application title bar. 1. Click on the **drop-down arrow**; a list

	of the monitored elements that have unopened responses is displayed. 2. Click on the element to investigate; the **Collaborate window** displays, showing the 'Discuss' tab and the response to the discussion thread. If you want to remove a discussion flag - or all discussion flags you have set - on the 'Discuss' tab of the Collaborate window click on the ≡ icon and select the 'Manage Monitored Discussions' option. The 'Manage Monitored Discussions' dialog displays, showing the monitored element names and their type, author and last-modified date. • Click on a specific element, or Ctrl-click on multiple names, and click on the **Delete button** to stop monitoring the discussions on those elements, or • Click on the **Select All** button and on the Delete button to clear all elements from your monitored discussion list • If you have selected elements but do not want to remove all of them, click on the **Clear All button** and make a different selection If you are spending time working in diagrams, there is also a convenient

	facility to monitor and access Discussions on elements within the diagram. See the *Collaboration Support in Diagrams* Help topic.
Add a response	Double-click on the 'Post Reply' message and type your response as continuous text. When you have finished typing, click off the text or press the **Enter key**. • A icon, your user ID and the date and time of posting display above your text • The message *Post Reply* displays above your response • The *Replies* count is incremented underneath the original posting You can also right-click on a post and select the 'Post Reply' menu option. All new replies are added underneath the discussion thread they are in response to, with the most recent reply at the end.
Edit postings	Whilst you are typing a message, the editor automatically checks the spelling and underlines possible spelling errors in red. You can backspace or move the cursor to the errors to correct them. You can also move the cursor anywhere in the

	message body and add or delete text (press the **Delete key**). Once you have posted a message, you can delete the whole message but you cannot edit it.
Copy discussion text	If you want to re-use some or all of the text of a discussion item, you can copy it to the clipboard by selecting the text and pressing **Ctrl+C** before you save it. You can then paste the text into a new discussion item or into another document in Enterprise Architect.
Set discussion status	The icon against a new discussion indicates that the discussion has the status of 'Open'. To change the status, right-click on the discussion item and select either: • 'Status | Awaiting Review' ( ) or • 'Status | Closed' ( ) If the discussion already has one of these statuses, you can also select the 'Open' option to return the discussion to 'Open' status. When you review the discussions in the **Collaborate window**, you might want to include discussions that have the status of 'Closed', or you might prefer to hide

	them. To toggle the inclusion of closed discussions, right-click on the body of the window and click on the 'Show Closed Topics' option.
Set discussion priority	As part of the discussion, you might want to identify the priority of a point being raised. It might be very important to act on the point, or it might be agreed that the point discusses a 'nice to have' feature that could be addressed at a later date. To set the priority, right-click on the discussion topic and select one of the options: • 'Priority | High' ( ) • 'Priority | Medium' ( ), or • 'Priority | Low' ( ) Alternatively, if you decide that an item does not need to be prioritized, select the 'Priority | <none>' option. This leaves the item icon as .
Delete a discussion or reply	Right-click on the discussion or a reply, and select the 'Delete Selected' menu option. A prompt displays to confirm the deletion. Click on the **Yes button**. If you delete a discussion, all replies associated with that discussion will be deleted as well.

Review Discussion History	Either: • Click on the object name bar at the top of the window, or • Right-click within the body of the window, or • Select the 'Start > Collaborate > **Discussions**' ribbon option In each case, select the 'Discussion History' option. The **Collaborations window** displays at the 'Discussions' tab, listing all existing discussion items on *elements*. You can right-click on the: • Column header band and select options to display the 'Field Chooser' and add to or reduce the number of columns, or to display the **Filter bar** to filter the list for discussions having a specific property such as the user who posted the discussion items, or the person who created the elements (element Author) • Body of the window and select to open a preview pane on the right or at the bottom of the window, to instantly see each discussion thread as you click on it in the list; you can also hide the preview pane if you do not need it • Body of the window and on the 'Visible

	Timeframe' option, selecting to show discussions posted today, or during the 3, 7, 30 or 90 days prior to today; the 'Today +' option also enables you to show postings from today and the 20 most recent postings prior to today • Body of the window and select to refresh the list to include any discussions that have been posted since you opened the discussion history • Selected element and select to: - Find the discussed element in the **Browser window** or diagrams - Display the 'Properties' dialog for the discussed element - Review and edit the discussion in the **Collaborate window**, opening the window if it is not currently available

Notes

- The **Discussions** facility is available in the Corporate, Unified and Ultimate Editions of Enterprise Architect
- If you are working with an External Data Provider in a Cloud-connected model, you can review external data

item features and characteristics in the 'External' tab of the **Inspector window**; see the *External Item Details* Help topic

- If the editor does not highlight spelling errors, select the 'Start > Desktop > Preferences > Preferences > Objects' ribbon option and deselect the 'Disable Spelling' checkbox
- A standard report is available for locating *elements* that have recently been the subject of discussions; select the 'Start > Collaborate > Discussions > Recently Discussed Elements' ribbon option

Reviews

A Review element is a simple yet powerful mechanism for capturing, in real time, discussions concerned with a particular event on one or more elements and/or diagrams. Typically, a Project Manager or other coordinator will create a Review element specifically to discuss one or more objects for a project phase, project stage or other category of review, over a defined period. A number of reviewers then 'join' the review and enter discussion points and responses in the **Collaborate window**. Note that you can only be joined to one Review element at a time.

The most direct and structured scenario would be for the review coordinator to create the Review element through the Reviews view. The Review element is a composite element to which the review coordinator would add a review diagram (as a 'Review Set') and then add to that diagram the elements and/or diagrams (as Navigation Cells) to be reviewed. A joined reviewer simply selects objects on the diagram and creates discussion topics or responses on each object using the 'Review' tab of the Collaborate window. The process for an element under review can be monitored and eventually approved by one or more designated 'Approvers' assigned to the individual element through the Review tab of the Collaborate window. The Project Manager might also set a status that, when an element under review reaches it, **locks** the element against review until it assumes a different status, as described at the end of this topic.

The Review element also acts as a bridge to continue focused discussions in subsequent work sessions.

The review comments pertinent to an element can be displayed in that element on a diagram, in the Review Compartment of the element.

If you want to simply comment on or discuss an element or diagram without capturing your discussion in a formal review, use the 'Discuss' tab of the Collaborate window. See the ***Discussions*** Help topic.

Using Review Elements

Review elements are used to plan and coordinate a formal review of part of your model, defining:

- When the review is to start and end
- What elements or diagrams are to be reviewed (and, as the review progresses, which objects have not yet been reviewed)
- The current status of the review
- Any specific instructions for performing the review
- Who is involved in the review
- Any resources to use during the review
- The priority of the review

The start and end date information is defined in two special EAReview Tagged Values (on the Review element 'Properties' dialog, see the 'General' page and 'EAReview' tab):

- EndDate - the date on which the Review will be complete with no further discussions expected
- StartDate - the date from which users can join the review, and add discussions and responses

Other information can be provided through the Review element's normal element properties including Linked Documents, Notes and associated Note elements, Tagged Values and attributes. Review elements and their contents can be the subject of searches and document generation, all of which add to the information-gathering and grouping purposes of the element. The element also has a child diagram that aids planning, management and coordination of the review, and that provides a quick overview of and access to the elements under review.

Review elements can be used in a number of contexts, including model development, testing, delivery, maintenance and management. They can be added to specific Review diagrams - which have their own 'Review' Toolbox page - or to more general diagrams, using 'Review' icons from the 'Review', 'Artifact', 'Maintenance' or 'Management' toolbox pages.

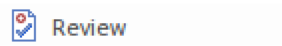
Review elements are generally set up and managed within Enterprise Architect, but users both of Enterprise Architect and of the **WebEA facility** can use Review elements to direct their input to discussions on project and model reviews.

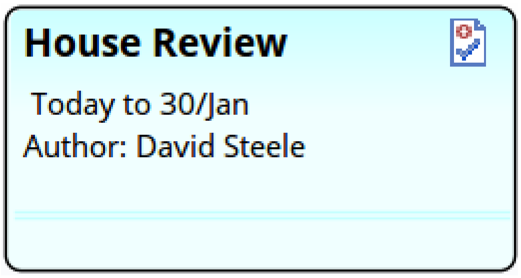
Creating a Review element

Typically, to create a Review element:

1. Open the **Reviews View** (the 'Start > Collaborate > Review > Manage Reviews' ribbon option).
2. Right-click on the View background and select the 'New Review' option; the 'Create Review' dialog displays, with the 'Name' field defaulting to the name of the currently-selected Package.
3. If necessary, overtype the name with a different Review element name.
4. In the 'Status' field click on the **drop-down arrow** and select the appropriate status.
5. In the 'Start' field, click on the drop-down arrow and select the date on which the review starts.
6. In the 'End' field, click on the drop-down arrow and select the date on which the review should complete. Click on the **OK button**.
7. In response to the prompt for the owner Package, either accept the current Package or browse for a different Package. Click on the OK button.
8. You are automatically joined to the review, in the **Collaborate window**, and can create some initial discussion points. A Review diagram is automatically created and displayed, containing the Review element.

Alternatively, you could start by creating a Review diagram (a Custom diagram in the 'Extended' category) or a diagram of any other type, and drag onto it the 'Review' icon from the **Diagram Toolbox** (as indicated in the *Using Review Elements* section); the icon and element have these appearances:





The element defaults to the Infoview style, which you can edit or disable. You would then display the element 'Properties' dialog and provide the start and end dates on the 'General' page 'EAReview' tab.

Assign Approvers

If you intend to assign review Approvers to some or all of the elements under review, you can do this through the 'Review' tab of the **Collaborate window** (press **Ctrl+9** and select the 'Review' tab), after adding the elements to be reviewed to the Review diagram. Simply:

1. Click on the appropriate element in the Review diagram or **Browser window** (or, subsequently, in the Reviews view).
2. Right-click on the element in the Collaborate window and select the 'Create Approver' menu option. The 'Create Approver' dialog displays.
3. Click on the **Add button** and - in the list - double-click

on the name of the required Approver. You can at this point click on the Add button again to add another Approver, or repeat this process from step 1; the end result is the same.

4. Click on the **Create button**. The name of each Approver is added as a separate item to the element in the **Reviews window** and the Collaborate window; if this is not visible, click on the expansion arrow for the element. The Approvers are listed in alphabetical order.

As the review progresses, the Approver(s) will monitor the process until an appropriate point to change the status (from 'Open' to 'Awaiting Review' or 'Approved', usually). If there are two or more Approvers, when one changes the status a standard message is automatically sent by **Model Mail** to the other Approvers, in this form:

<approver name> has updated the Approval Status for <element_name> in the review Review - <name>.

The status has changed from <original status> to <new status>.

Please check the Review item and action as required.

A link to the element under review enables the Approver to access the element directly.

Alternatively, rather than send a message to indicate they have *taken* action, an Approver might want to remind another Approver to *take* action. In this case, in the Reviews view, the first Approver would right-click on the required

Approver name and select the 'Send Approval Reminder' option. A standard message is displayed and, if required, the sender can add further text and/or additional addressees. The standard message has this format:

A reminder that you are an Approver on the item <element name> and action may now be required as part of that Review.

Please check the Review item and action as required.

Again, the recipient has a link to the element under review, to access it directly.

Locating Review elements

In order to join a review, you have to locate the available Review elements and select the appropriate one.

Select the 'Start > Collaborate > Review > Manage Reviews' ribbon option. The Reviews view displays, showing the Review elements that exist in the model, grouped according to the 'Status' value.

Having listed the available reviews, you can join one by right-clicking on it and selecting the 'Join Review' option. This makes the review your Active Review, and the entry displays in bold. (Right-click on the View background and select the 'Refresh' option.) This review remains your Active Review after you log out and log in again, until you specifically select the 'Leave Review' option.

Further information on the Reviews view is provided in the *Manage Reviews* section later in this topic.

There are a number of alternative options for locating Review elements. In the header of the 'Review' tab in the **Collaborate window**, click on the ≡ icon and select one of these options:

- 'Manage Reviews' to open the Reviews view, as just described, to list all Review elements
- 'Current Review Details' to display the discussion history of your current review, and to show the details of the elements reviewed
- 'Find Current Review in Browser' to locate your active Review element in the **Browser window**

You can also select one of the six reports from the 'Find in Project' window, **Discussions** group (select the 'Explore > Search > Model' ribbon option and the 'Discussions' option in the drop-down list in the first field):

- Recently Discussed Elements - lists the elements that have recently been discussed in reviews
- Recent Element Posts - lists the recent discussion comments that have been posted against elements under review
- Review - lists the Review elements that exist in the model
- Recently Modified Reviews - generates a list of Review elements that have been recently created or modified
- Recently Discussed Reviews - generates a list of Review

elements in which discussions have taken place

- Open Reviews - generates a list of Review elements with the status 'Open', which can be joined for discussion

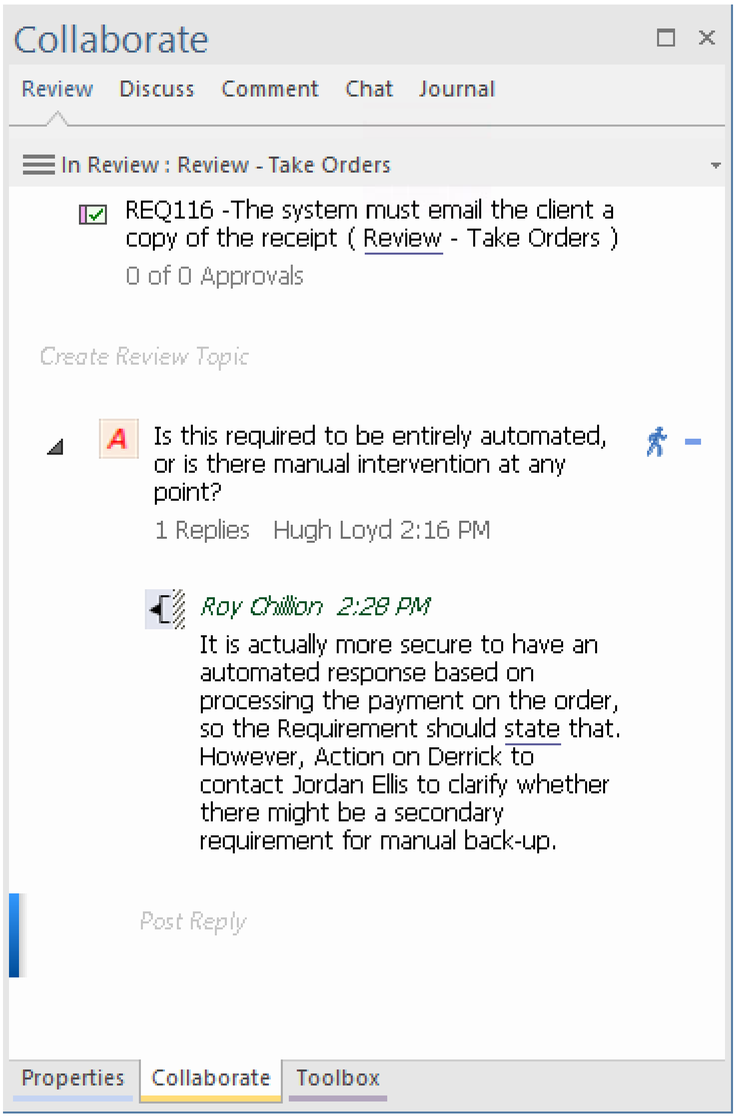
Performing Reviews

To join a review, select the 'Start > Collaborate > Reviews > Manage Reviews' option, right-click on the required review from the Reviews view and select the 'Join Review' context menu option.

Alternatively, to join a review you could:

- Right-click on the appropriate Review element in a diagram, the **Browser window** or the results of a model search, and select the 'Join Review' context menu option
- If a review is shown in the 'Review' tab of the **Collaborate window**, right-click on it and select the 'Join Review' option

The Collaborate window displays at the Review tab; the name of the review element then becomes the button name at the top of the screen, and the name of the selected element being reviewed displays beneath that.



If the element has been assigned one or more Approvers, the message *0 out of <n> Approvals* displays under the element name, followed by a user name item for each of the assigned Approvers. In the message, *0* is the count of approvals registered, and *<n>* is the number of Approvers required to approve the review of the element. If no Approvers have been assigned, no message displays.

Any existing review topics for the currently selected model element display in the body of the window in reverse date/time order, with the most recent topic at the top of the list.

When you have joined a review, that is your Active review until you leave the review again. The Review element links to the review topics and posts of each joined user until they select the 'Leave Review' context menu option.

When you want to continue adding to a review you have left, you can join it again using the 'Join Review' menu option.

Contributing to a Review

After you have joined a review, select the 'Start > Collaborate > Reviews > Review' ribbon option. The **Collaborate window** displays at the 'Review' tab. (Alternatively, press **Ctrl+9** and select the 'Review' tab.)

Click on the element or the Navigation Cell for the diagram that you want to comment on, in the Review diagram or the Reviews view, to make that object the focus of the Collaborate 'Review' tab.

Alternatively, click on the object to review in the **Browser window** or a non-Review diagram and:

- Right-click on the object > Collaborate > Review

To create a topic for review or make a response to a topic, use the guidelines provided in this table.

Operation	Action
Create a	Below the element name, but above any

review topic	existing review conversation, the message *Create Review Topic* displays. Note that an element under review can be locked against posting any further topics or responses, according to the element's status. In this case the message *This Review is now <status triggering the lock> and cannot be updated* displays instead. Double-click on the *Create Review Topic* message and type your topic as continuous text (no carriage returns). The text automatically wraps at the border of the **Collaborate window**. If you do need to break your text into paragraphs, press **Ctrl+Enter** at the break point. When you have finished typing, click off the text or press the **Enter key**. • An open expansion arrow and a icon display at the start of your text, and your user name, the time or date of posting and the number of replies (initially zero) display beneath your text • The message *Create Review Topic* displays above your current discussion topic, and the message *Post reply* displays underneath the topic

	If user security is enabled and you have selected to show avatars, the discussion icon is replaced by an image representing the user who contributed that item. If the user does not have a personal avatar image, a default 'head and shoulders' silhouette displays as the avatar.
Add a response	Double-click on the 'Post Reply' message and type your response as continuous text. When you have finished typing, click off the text or press the **Enter key**. • A icon, your user ID and the time of posting display above your text • The message *Post Reply* displays beneath your text You can also right-click on a post and select the 'Post Reply' menu option. All new replies are added underneath the review thread they are in response to.
Edit postings	Whilst you are typing a message, the editor automatically checks the spelling and underlines possible spelling errors in red. You can backspace or move the cursor to the errors to correct them. You can also move the cursor anywhere in the message body and add or delete text

	(press the **Delete key**). Once you have posted a message, you can delete the whole message but you cannot edit it.
Copy review topic text	If you want to re-use some or all of the text of a review item, select the text before you save it and press **Ctrl+C** to copy it to the clipboard. You can then paste the text into a new review item or into another document in Enterprise Architect. You can also paste copied text from the clipboard into the review item, by pressing **Ctrl+V**.
Set review topic status	A new review topic has the status of 'Open', with no indicator. To change the status, right-click on the item and select either: • 'Status | Awaiting Review' to indicate that some form of confirmation or approval is required for the point raised in the review topic (the indicator then displays to the right of the topic) or • 'Status | Closed' to indicate that users should not add any further comments to the thread (the indicator then displays to the right of the topic)

	If the review topic already has one of these statuses, you can also select the 'Status | Open' option to return the topic to 'Open' status, indicated by the icon.
Set review topic priority	As part of the review, you might want to identify the priority of a point being raised. It might be very important to act on the point, or it might be agreed that the point discusses a 'nice to have' feature that could be addressed at a later date. To set the priority, right-click on the review topic and select one of the options: • 'Priority | High' ( ) • 'Priority | Medium' ( ), or • 'Priority | Low' ( ) Alternatively, if you decide that an item does not need to be prioritized, select the 'Priority | <none>' option. This leaves the item icon as .
Set Approval status	Only the named Approver is able to change the status or priority of their Approver item. To set the status, the Approver right-clicks on their Approver item and can select the 'Open' or 'Awaiting Review' options as for a reviewer. However, the third option in this case is 'Approved', which indicates

	that the selected element has completed review and all decisions and defined changes are approved. If the Approver selects the 'Approved' option, the indicator then displays to the right of the item and the *0 out of <n> Approvals* message is incremented to show that the element has received one of the required Approvals.
Delete a review topic or reply	Right-click on the review topic or a reply, and select the 'Delete Selected' menu option. A prompt displays to confirm the deletion. Click on the **Yes button**. If you delete a review topic, all replies associated with that topic will be deleted as well.

Manage Reviews

Select the 'Start > Collaborate > Reviews > Manage Reviews' ribbon option.

(Alternatively, click on the 'In Review' button across the top of the 'Review' panel in the **Collaborate window** and select the 'Manage Reviews' option.)

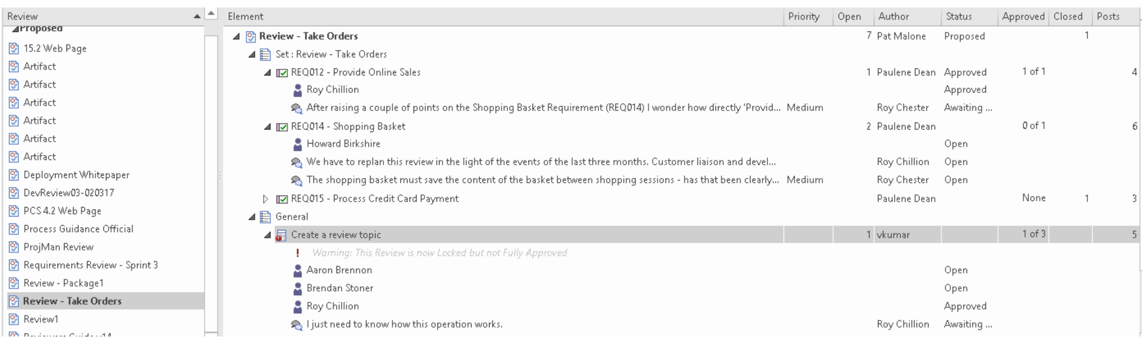
This displays the Reviews view, listing all Review elements in your model in the 'Review' panel and the details of the elements under review in the right-hand panel. This allows you to quickly see what reviews are taking place and what is happening within any review you want to explore.

If you are already joined to a review, your active Review element is displayed in the list in bold. Otherwise, you can join a review by right-clicking on the Review element name and selecting the 'Join Review' option. Equally, you can leave your active review by right-clicking on it and selecting the 'Leave Review' option.

Click on the Review item you have joined, and check the elements under that review in the right-hand panel.

For each Review element there is at least one 'Set' segment, the first of which identifies the elements to be reviewed as added to the Review diagram. The second 'General' segment identifies any review activity on the Review element itself, or on any other elements in the model that are added to the review but not included on the diagram.

The columns of the display show a number of properties of each element in the review.



These properties include the start and end dates of the review period, the number of topics posted for the element, the number of those topics open or awaiting review and the number closed, the number of topics and replies posted in the last three days, between three and fifteen days ago, and more than fifteen days ago. You can change the sequence of these columns if you prefer, by dragging the column headings across the heading band.

You can right-click on:

- The column headers to add or remove columns using the 'Field Chooser', and to display the **Filter bar** to filter the list for review topics having a specific property
- An element name to display the element Review topics and comments on the 'Review' tab of the Collaborate window
- An element name to find the element in the **Browser window** (or double-click on the item); this also opens the Collaborate window for the element
- An element name to locate any diagrams that contain the element
- The window and select the 'Refresh' option to refresh the list, to include any review topics that have been posted since you opened the review

The 'Field Chooser' dialog offers additional columns to add to the Review listing.

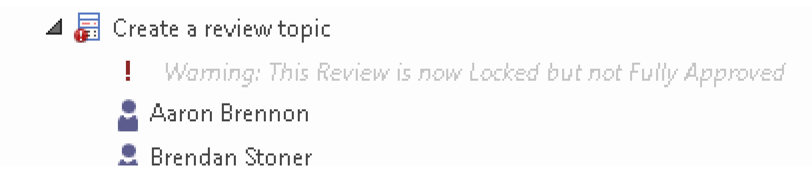
If you are not joined to a review, you can also create a new Review element by clicking on the 'New Review' option, as explained at the top of this topic.

Locking elements under review

Towards the final stages of a review of an element, the review managers might want to collate information before inviting final comments, approval or sign-off. Or they might close off the review of the element altogether and not allow further comments. In such scenarios, the review managers can set one or more status values at which an element under review will be automatically locked against the posting of review topics and replies. According to the way the managers want to progress elements through stages, the element under review might be assigned a subsequent status - or revert to a previous status - that did not lock the element against review comments.

You set up the locking status for elements under review using the 'Review Status Locks' page of the 'Manage Project Options' dialog. See the *Review Status Locks Page* Help topic.

In the Reviews view, if an element under review is locked because of its status but it has not been fully approved, its element-type graphic has a red circular icon overlaid by an exclamation point. If the item is expanded, it shows a message under the element name and above the Approver names. These indicators are illustrated here:



Comments

Enterprise Architect provides a great facility for maintaining a daily log of ideas, comments, notes, suggestions, events, to-do lists and other reminders of what the developers concerned with a selected element have done or intend to do for the selected element. Like the model-level personal Journal, this is a good way to keep the momentum flowing day to day. The facility is simple to use, allowing you to quickly jot down your thoughts as they occur to you.

The 'Comment' tab is part of the **Collaborate window**, and allows you to record points as you work on, review and discuss the element with other team members.

Access

Ribbon	Start > Desktop > Share > Comment
Context Menu	Right-click on element in diagram or **Browser window** | Collaborate | Comment
Keyboard Shortcuts	**Ctrl+9** > Comment

Creating the first 'Comment' tab entry

If you are the first to access the 'Comment' tab for an element, it has the single entry 'Today' in the 'Date' column. You can type freely in the 'Comment' column against 'Today', including carriage returns and text formatting. Right-click on selected text to access the editing options (derived from the Notes context menu), which include:

- Creating a Glossary definition from the text, inserting existing definitions in the text, and highlighting terms that have been defined in the Glossary
- Generating a new element in the same Package, with the selected text as the name and linked to the text
- Creating a link from the selected text to an existing element in the model
- Creating a hyperlink to a wide range of target objects, including image files, diagram images, web pages, text files, Help topics and Enterprise Architect commands
- Marking selected text for special translation, or to be omitted from automatic translation
- Applying a range of character formatting options, such as font type and size, bolding, underlines and italics, and removing those character format settings or applying the default font
- Applying bullet lists or numbered list to the paragraphs of text
- Searching for instances of the selected text in a range of

sources (options derived from the 'Code Editor' context menu)

- Undoing the latest change to the text
- Editing the text, with cut, copy, paste and delete, and selecting all the Comment text entered for a day
- Printing the selected text, and checking meanings and synonyms using the online Thesaurus

When you have finished typing your comments, click off the **Collaborate window**.

You can return to the Comment at any time (as long as another user is not actively updating the tab) and:

- Add further notes; you and other team members use the same Comment to record notes and comments on the element throughout the day
- Edit the existing text, including reformatting
- Delete text or complete notes; select the text and click on the **Delete key** or use the 'Delete' context menu option

Comment Entries Each Day

Every day, when you open Enterprise Architect and review the 'Comment' tab for an element, it has a 'Today' item at the top, against which you record the day's Comment entries on the selected element. Beneath the 'Today' item are the entries for previous days, identified by the date on which they were made. These only include dates on which an entry was made; there are no blank lines for days on which no entries were made.

As you build up a number of comments on an element, you can set the number of comments to display (effectively the number of days on which comments were posted) in chronological order, starting with Today. To do this:

1. Click on the Hamburger icon at the top of the tab and select the 'Show this many comments' option.
2. On the submenu, click on the number of days for which to show comments - 1 (Today), 3, 7, 15, 30 or All (every comment posted on this element).

You can also pin the currently listed comments for an element to the tab. Those comments show in the tab regardless of which other element you are working on, which is a useful way of showing instructions written to guide your work on other elements. To pin the comments:

1. Click on the Hamburger icon at the top of the tab and select the 'Pin this comment' option.
2. When you want to display comments for other elements, click on the Hamburger icon again and select the 'Unpin Comment' option.

As well as formatting and editing today's entry, you can edit the entries for previous days. This means you can remove information that is no longer relevant (such as old reminders) or things that were listed to be achieved that are now complete. On the other hand, you can also highlight entries that are still significant, and refer back to them from the 'Today' entry.

Model Mail

The **Model Mail** facility provides you with the ability to send, receive and respond to emails within the project team, under your User Security ID, either as an individual user or as a member of a group that has a shared mail inbox. The 'Mail' tab of the **Collaborations window** shows all emails that you have received, and the 'Sent Messages' tab in the main view shows all the emails you have created and sent. Within the facility you can re-organize, forward, delete and mark the emails, both sent and received.

This facility is available in the Corporate, Unified and Ultimate Editions of Enterprise Architect, with User Security enabled; the mail system uses the individual and group users defined in User Security.

Access

Ribbon	Start > Collaborate > Mail > Inbox Start > Collaborate > Mail > Sent Mail

Review your Model Mail messages

Option	Action
Open a message	Double-click on the message. If the message contains a hyperlink, click on the link to open or display the target file or object.
Flag	Check the color of the flag to the left of the message to establish the significance of the message (the meanings of the flag colors should be defined within the project team).
Status	Check for the read ( ) or unread ( ) icon; unread message items are anyway displayed in bold. If you have responded to a message, the icon includes a green arrow ( ).
Sender	The name of the project team member who sent the message.
Subject	The topic of the message.
Date	Indicates the age of the message, whether it was sent: • Today • Yesterday

	- This week - This Month - Last Month - Older
Sent	The exact date and time the message was sent.
Select Columns	Right-click on the column headings and select the 'Field Chooser' menu option, which enables you to add or remove specific columns from the display. You can also click on the column headings and drag them across the header bar to reposition the columns in a different sequence. Adding the 'To' column will display the user account or group name that this mail item was sent to; this column is useful to identify whether the message was sent to you as an individual or as a member of a Group with a Shared Mail inbox - if you received the message as a member of a shared mail group, remember that your actions on this message will also affect all other members of this group.
Filter	You can filter the mail items listed by displaying the **Filter** Bar (right-click on

Columns	the column headings and select the 'Toggle Filter Bar' option) and typing in the value (or partial value) to filter on. For example, if you type your group mail account name in the filter field for the 'To' column, you will list only those mail items sent to the group mail address, not those sent to you as an individual. To clear the value of a filter field, click on the blue cross against that field.
Reorganize messages in the list	Either: • Click on a column heading to toggle sorting of list items by this column in ascending or descending order, or • Right-click on the column heading and select the 'Enable Group Box' option to organize the messages into groups

Model Mail Menu Options

These options are available from the context menu when you right-click on messages in the body of the tab.

Option	Action
Compose	Click to open the 'New Message' tab in

New Message	the main work area, through which you create and send a mail message. Alternatively, if you have selected not to use the main work area, the 'Model Message' dialog displays (see the 'Edit Messages in Main Tab View' option later in this table). You can also open the tab or dialog using the 'Start > Collaborate > Mail > Send Message' ribbon option, or right-click on an element in the **Browser window** or a diagram and select the 'Collaborate | Send Message' option.
Reply	Create a response to the sender of the message, which includes a copy of the message and any earlier messages in the thread. If you have left the 'Edit Messages in Main Tab View' option selected, the '<message subject>' tab opens in the main work area; otherwise, the 'Model Message' dialog displays. Shortcut: **Ctrl+R**
Reply to All	Create a response to the sender of the message and the other recipients, which includes a copy of the message and any earlier messages in the thread. If you have left the 'Edit Messages in Main Tab

	View' option selected, the '<message subject>' tab opens in the main work area; otherwise, the 'Model Message' dialog displays. Shortcut: **Ctrl+Shift+R**
Forward	Forward the message to other project team members with, if necessary, your own comments. If you have left the 'Edit Messages in Main Tab View' option selected, the '<message subject>' tab opens in the main work area; otherwise, the 'Model Message' dialog displays. Shortcut: **Ctrl+F**
Set Message Flag	Select the appropriate flag color to establish the significance of the message (the meanings of the flag colors should be defined within the project team). You can also select: • Complete - to display a tick next to the message, indicating that any actions required by the message content have been taken • None - to display only a grayed outline of the message flag, with no status color or 'complete' tick
Mark as	

Unread	Mark the selected messages as unread. Shortcut: **Ctrl+U**
Mark as Read	Mark the selected messages as read. Shortcut: **Ctrl+Q**, or click on the message and press the **R key**.
Check for New Messages	Refresh the message list to include any new messages waiting in the message queue, which would otherwise not display until the automatic refresh cycle has run. Shortcut: Ctrl+F5
Limit Mail Items To	Click on this option to display a short list of time intervals - 30, 60 or 90 days - and select one to filter the list of Mail messages to those received during that interval. Select 'All' to remove interval filtering from the list.
Show Preview Pane	Select this option to show the content of a selected message in a panel either to the right or beneath the list of Mail messages, according to the sub-option you select. Click on the 'Hide' sub-option to close the preview panel.
Open Sent	Click on this option to open the 'Sent

Messages	Messages' tab in the main view of the Enterprise Architect work area, listing the messages you have created and sent. You can also display the 'Sent Messages' tab by selecting the 'Start > Collaborate > Mail > Sent Mail' ribbon option.
Edit Messages in Main Tab View	Defaults to selected to display the 'New Message' tab in the main work area, in which you compose a new message, a reply to a message sent to you, or an annotation on a message you are forwarding to someone else. Deselect this option to open the free-floating 'Model Message' dialog in which you perform the same functions.
Delete	Delete a selected message or messages; you are prompted to confirm the deletion.

Manage your sent messages on the Sent Messages tab

Option	Action
Open a	

message	Double-click on the message. From the open message you can reply to yourself (perhaps to annotate what you sent to the recipients), reply to yourself and all other recipients (to quickly add more information for the same mail list), or forward the message to other team members, using the appropriate icon in the toolbar of the message.
Flag	Check the flag color to establish the significance of the message (the meanings of the flag colors should be defined within the project team).
To	Check the name(s) of the project team member(s) to whom the message was sent.
Subject	The topic of the message.
Date	Indicates the age of the message, whether it was sent: • Today • Yesterday • This week • Last Week • This Month

	• Last Month • Older
Sent	The exact date and time the message was sent.
Sender	Show the name of the person who sent the message; that is, either you as an individual or a member of your user group.
Select Columns	Right-click on the column headings and select the 'Field Chooser' menu option, which enables you to add or remove specific columns from the display. You can also click on the column headings and drag them across the header bar to reposition the columns in a different sequence. Adding the 'Sender' column is useful to identify whether you have sent the message as an individual, or as a member of a shared mail group.
Reorganize messages in the list	Either: • Click on a column heading to toggle sorting of list items by this column in ascending or descending order, or

	• Right-click on the column heading and select the 'Enable Group Box' option to organize the messages into groups
Reply to All	Right-click on the message and select the 'Reply to All' context menu option to send a further email to yourself and the recipients of the message The 'New Message' tab of the main work area, or the 'Model Message' dialog, displays. Shortcut: **Ctrl+Shift+R**
Forward	Right-click on the message and select the 'Forward' option to send the selected message to other team members. The 'New Message' tab of the main work area, or the 'Model Message' dialog, displays. Shortcut: **Ctrl+F**
Delete messages	Right-click on the message and select the 'Delete' option. You are prompted to confirm the deletion.

Create a Message

You can use the 'New Message' tab of the main work area, or the 'Model Message' dialog, to compose messages to project team members within the project, under your Author ID. You use the same tab or dialog to:

- Reply to messages from other team members
- Forward messages to other team members
- Link model components to the message, or add hyperlinks to files or other objects of relevance

The 'New Message' tab displays if the 'Edit Messages in Main Tab View' option is selected on the 'Mail' tab (intray) of the **Collaborations window**. The 'Model Message' dialog displays if that option is not selected.

Access

Context Menu	In a diagram or the **Browser window**, right-click on an object (or select several objects) | Collaborate | Send Message
Ribbon	Start > Collaborate > Mail > Send Message or In a diagram or the **Browser window**, click on an object (or select several objects), then Start > Collaborate > Mail

	> Send Message with Link

Create a message to another project team member as a new message (or a reply to a message or a forwarded message)

Step	Action
1	If you have selected one or more elements before selecting the context menu 'Send Message' option or ribbon 'Send Message with Link' option, the message editor screen immediately displays with links to each selected object. The recipient of the message will be able to press **Ctrl** and click on each link to open the 'Properties' dialog for the corresponding object.
2	Otherwise, the 'Mail' tab of the **Collaborations window** displays. Select the appropriate Hamburger menu option to create or open and reply to or forward a message. The message editor screen displays.
3	If you are creating or forwarding a message, or you want to send a reply to a wider audience, for each

	person you intend to send the message to: • Click on the **To: button** A list of project team member and group IDs displays • Scroll to the required name and double-click on it The name is added to the 'To:' field
4	In the 'Subject' field, type or edit the subject of the message as necessary.
5	In the 'Flag' field click on the **drop-down arrow** and on the appropriate flag color or option for your message.
6	In the text panel, write the text of your message. You can format the text using the facilities of the 'Notes' toolbar at the top of the field.
7	If you intend to link a (further) diagram or model object to this message, place the cursor at the appropriate position in your message text, click on the object in the **Browser window**, and click on the **Insert Quick Link button**. A short menu displays, listing the name of the object you have selected or 'Other' to search for and select another object. To link to the object you selected, click on its name; a hyperlink to that object is inserted in the message text.

8	If you intend to link to some other object, or you want to link to another target such as a file, **Model Search** or Library message, click on either: • The 'Hyperlink' icon in the message (or Notes) toolbar or • The **Insert Quick Link button** and select the 'Other' option The 'Hyperlink Details' dialog displays; create the required link.
9	Click on the **Send button** to send the message to the recipients.

Notes

- This facility is available in the Corporate, Unified and Ultimate Editions of Enterprise Architect, with User Security enabled (Security provides the user names to address your mail message to)
- Once you have sent a message, it is listed on the 'Sent' tab in the main work area; in the 'Mail' tab, right-click and select 'Open Sent Messages' to display the 'Sent' tab

Library Window

If the project team members require a forum in which to discuss the development and progress of the project - including holding documents such as specifications, requirements and project guidelines - they can make use of the facilities of the Enterprise Architect **Library window**.

Access

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Features

Feature	Description
Structure	A point of discussion and the responses (Comments) to that point are created as Documents. Documents are held in Topic groups, which are in turn organized into

	Categories; your organization decides on the grouping and organization of Documents. You can create text to explain Categories and Topics, and you can create and respond to Documents and Comments on Documents.
Displays	The **Library window** has two main displays: • The Library window itself is used to create new Categories and Topics and to delete messages; you operate on it by selecting options from the context menu Each item in the hierarchy displays a mouse-over tool-tip, showing the item title, the author's name and the date and time the item was created • The 'Team Document' tab, in the main work area, is used to create, view, edit, print, and comment on Documents, and to create and maintain the descriptions of Topics and Categories This tab has a status bar that shows the item author's name, the date and time the item was created, and the date and time the item was last modified

Facilities	Within the **Library window** you can: • Select to display and edit an item in the 'Team Document' tab, by clicking on the item name in the Library window • Search for text strings in the item titles to locate Documents on a specific subject, using the 'Search' icon in the toolbar of the Library window • Add resources to a Category, Topic or Document, such as diagram images and XMI files of Packages; these are held in a *Resources* folder under the selected Library item • Link model elements, diagrams, external files and other Documents to a Document • Link to a Library Document from the Linked Document on an element • Change the loading behavior of the Library window • Access Libraries from other projects, including those on other servers
Specification Manager	The **Library window** acts as a repository for the review documents generated in the **Specification Manager**. These documents are automatically stored in Topics within the Formal Reviews

	Category, but you can redirect documents to a different Topic from the Library window, using the 'Bind to Project Browser Package' option.
Icons	Each item in the **Library window** has an icon that indicates the nature or status of the item. The meaning of each of these icons is explained here: •  - Document name •  - Comment name • - Protected by password (also on Category and Topic icons); a blue icon indicates that a user with the password has opened the item, and a red icon indicates that the item is locked •  - Status 'Awaiting Approval' (also on Category and Topic icons) •  - Status 'Approved' (also on Category and Topic icons) •  - Status 'Rejected' (also on Category and Topic icons) •  - Category name •  - Topic name •  - Resources folder for a Category, Topic or Document •  - Linked objects folder for a Category, Topic or Document

	• - Diagram or clipboard image within the Resources folder • - XMI file of a Package, within the Resources folder

Notes

- You can transport your Library set-up between projects, using the 'Configure > Model > Transfer > Export Reference Data' and 'Import Reference Data' ribbon options

Work on Library Items

Within the **Library window**, you can perform a wide range of operations on the Documents and the Topics and Categories that contain them. These operations include creating an item, commenting on a Document, password-protecting an item so that it is not accidentally changed, accessing protected items, adding resources to an item, and deleting an item. All of these operations are accessed through the context menu in the Library window.

Access

Open the **Team Library window** using one of the methods described here, then right-click on an item

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Library Options

Option	Action

New Category New Topic New Document	Add a new Category, new Topic or new Document to the **Library window**. Alternatively, click on the 'New Topic' or 'New Document' icon in the window toolbar.
New Category From Template New Topic From Template New Document from Template	Add a new Category, new Topic or new Document, based on a defined template.
New Comment	Create a response to the selected Document. Alternatively, click on the 'New Comment' icon in the window toolbar.
Rename	Edit the name of the currently-selected item, in situ. Shortcut: **F2**

Copy Path to Clipboard	Copy the path of the currently-selected item to the clipboard. You can then paste the path into a document or file to add the discussion to any text concerning the item. Shortcut: **Ctrl+C**
Show Contents	Display the description or text of the item selected from the **Library window**, if the 'Team Document' tab is not yet open.
Share Resource	(If anything other than a *Resources* folder is selected.) Add an item into the *Resources* folder under the selected Category, Topic or Document. If a *Resources* folder does not exist, one will be automatically created. Available options: • Package from Current Model • Image of Active Diagram • Active **Profiler** Report • Bookmark Active Website • Image from Clipboard
Add Package From Current Model	(If a *Resources* folder is selected.) Export a Package as an XMI file from the current model as a resource of the selected Category, Topic or Document.

	You browse for and select the required Package using the 'Select <item>' dialog.
Import to Current Model	(If a Package XMI file resource is selected.) Import the resource Package to the current model. You browse for and select the required target Package using the 'Select <item>' dialog; the resource is imported as a child of that Package. This is a useful option for transferring relevant Packages from the Library of one model into another model.
Image of Active Diagram	(If a *Resources* folder is selected.) Add an image of the currently-displayed diagram as a resource of the selected Category, Topic or Document. You are prompted to provide a reference name for this image.
Active Profiler Report	(If a *Resources* folder is selected.) Add an active **Profiler** Report as a resource of the selected Category, Topic or Document. You are prompted to browse for and select the appropriate active report.

Image From Clipboard	(If a *Resources* folder is selected.) Add an image held on the clipboard as a resource of the selected Category, Topic or Document.
View Image	(If a diagram image resource is selected.) Open the **View Image window**, containing an image of the selected diagram. Alternatively, double-click on the image name.
Copy Image To Clipboard	(If an image resource is selected.) Copy the image or diagram image to the clipboard.
Refresh Category 'xyz' Refresh Topic 'xyz' Refresh Document 'xyz' Refresh Comment 'xyz'	Refresh the currently-open Category, Topic, Document or Comment, getting new Comments, Documents and Topics that other users might have created. However, if you open a different Category, Topic or Document the **Library window** always displays the latest information from the database. Alternatively, click on the 'Refresh' icon in the window toolbar.

Reload Current Connection	Reload the entire Library connection, getting new Categories, Topics and Documents.
Review Status	Assign or clear a status marker against the selected Category, Topic or Document; you can mark the item as: • Awaiting Approval • Approved • Rejected Or clear the marker (None).
Bind to Project Browser Package	Bind the selected Topic to a Package in the **Browser window**, so that Review Documents created in the **Specification Manager** for that Package are automatically stored in the Topic. When you select this option, the 'Select Package to Bind' dialog displays, on which you browse for and select the Package to bind the Topic to.
Security Options	Access one of three options: • 'Apply Password Lock' - to display a prompt to enter a security password • 'Unlock for Editing' - to display a prompt to enter the set password so that

	you can edit the item • 'Remove Password Lock' - to display a prompt for the set password, which is then removed When you set the password, an exclamation mark icon is added to the Category, Topic or Document name.
Connections...	Access other Team Libraries from other Enterprise Architect models or models located on servers. Alternatively, click on the **drop-down arrow** in the 'Connection Options' field in the window toolbar, and select one of the listed models. Use the '<Configure Connections>' option to add and connect to additional Team Libraries.
Options...	Change the loading behavior of the **Library window**.
Delete Category 'xyz' Delete Topic 'xyz' Delete	Delete this Category, Topic, Document or Comment and all sub-topics and sub-documents, or delete the resource attached to the item. Alternatively, click on the item and press the **Delete key**.

Document 'xyz' Delete Resource 'xyz' Delete Comment 'xyz'	A confirmation dialog displays; click on the **Yes button** to remove the item and any dependent items from the **Library window**.

Add a New Category

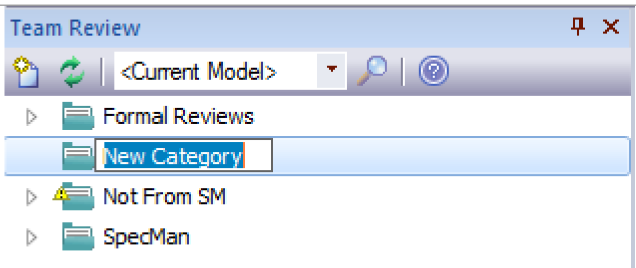
You can add new Categories to the **Library window**, in which to store related Topics and Documents.

Access

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Create a Category

Step	Action
1	Right-click on a blank area in the **Library window** and select the 'New Category' option. A new 'Category' icon displays in the hierarchy.

	
2	Overtype the *New Category* text with the name of the Category, and click off the name. The Category description editor displays in the 'Team Document' tab; type the appropriate Category description, if required.
3	Add new Topics and/or resources to the Category.

Create a Category - Alternative

Step	Action
1	Right-click on a blank area in the **Library window** and select the 'New Category from template' option. A new 'Category' icon displays in the hierarchy.
2	Overtype the *New Category* text with the name of the Category, and click off the name. The 'New Category from Template' dialog displays.

3	Click on the 'Template' **drop-down arrow** and select a predefined template for the Category description. Click on the **OK button**.
4	The Category description editor displays in the 'Team Document' tab; type the appropriate Category description, if required.
5	Add new Topics and/or resources to the Category.

Add a New Topic

In the **Library window** you can add new Topics to a Category, in which to store related Documents and their Comments.

Access

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Create a new Topic

Step	Action
1	Either: • Right-click on the required Category name in the **Library window** and select the 'New Topic' option • Click on the Category name and click on the 'New

	Topic' icon in the Library window toolbar, or • Click on the Category name and press **Ctrl+N** A new 'Topic' icon displays under the Category name.
2	Overtype the *New Topic* text with the name of the Topic, and click off the name. The Topic description editor displays in the 'Team Document' tab; type the appropriate Topic description, if required.
3	Add new Documents and/or resources to the Topic.

Create a new Topic - Alternative

Step	Action
1	Right-click on the required Category name in the **Library window** and select the 'New Topic from Template' option. A new 'Topic' icon displays under the Category name.
2	Overtype the *New Topic* text with the name of the

	Topic, and click off the name. The 'New Topic from Template' dialog displays.
3	Click on the 'Template' **drop-down arrow** and select a predefined template for the Topic description. Click on the **OK button**.
4	The Topic description editor displays in the 'Team Document' tab; type the appropriate Topic description, if required.
5	Add new Documents and/or resources to the Topic.

Notes

- If you already have the 'Team Document' tab open, the 'New Topic from Template' dialog displays as soon as you select the 'New Topic from Template' menu option; you can click on and overtype the Topic name after you have created the Topic description

Add a New Document

Within the **Library window**, you can create a new Document on a Topic as either:

- A blank Document
- A Document based on a predefined template, or
- A Document from a file link

Access

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Create a blank Document

Step	Action
1	Either: • Right-click on the appropriate Topic name in the

	Library window and select the 'New Document' option • Click on the Topic name and on the 'New Document' icon in the Library window toolbar, or • Click on the Topic name and press **Ctrl+N** A new 'Document' icon displays underneath the Topic name.
2	Overtype the *New Document* text with the name of the Document, and click off the name. The text editor displays in the 'Team Document' tab.
3	Type the text of the Document as required.

Create a Document based on a predefined template

Step	Action
1	Right-click on the appropriate Topic name in the **Library window** and select the 'New Document from template' option. A new 'Document' icon displays in the hierarchy.

2	Overtype the *New Document* text with the name of the Document, and click off the name. The 'New Document from Template' dialog displays.
3	Click on the **drop-down arrow** in the 'Template' field, and select a predefined template for the Document contents.
4	Click on the **OK button**. The template structure is displayed in the 'Team Document' tab.
5	Type in or paste the text of the Document.

Create a Document based on a link to an external file

Step	Action
1	Open a file browser (such as Windows Explorer) and locate the file.
2	Click on the file name and drag it onto the appropriate Topic name in the **Library window**.

	A new 'Document' icon is created underneath the selected Topic, and the body of the Document is shown in the 'Team Document' tab. A link to the source file is created at the start of the message.
3	Click twice on the *New Document* text in the **Library window**, and overtype the text with the name of the Document.
4	In the 'Team Document' tab, create and edit text around the file link, and add further links if required.

When you have created the Document

You can	Detail
Create links from the Document	To elements and diagrams from the: • **Browser window** • **Model Search** • 'Views' tab of the **Focus window**, or • **Package Browser**
Create links from the	Such as: • Categories

Document to Library objects	• Topics, and • Documents
Create links from the Document to external files	These links can be either in the text of the Document or on the Category, Topic or Document in the **Library window** (the link is added to the *Model Links* folder for the Library item).
Add resources to the Document	It is simple and convenient to link to the resources that are the subject of discussion or that illustrate points in the discussion.
Receive Comments on the Document from other users	The purpose of the **Library window** is to discuss aspects of development, so you can expect to receive Comments on the Documents that you have posted, and to create Comments on the material posted by your colleagues.

Comment on a Document

You use the **Library window** as a forum for discussion of items and issues within the project, so when you read a Document on a particular point (or a response to that Document) you might want to respond with your own Comment.

You can create a Comment directly from the Document you are responding to, from material that you want to use as your response, or from a predefined document template.

Access

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Create a Comment in the Library

Step	Action

1	Either: • Right-click on the required Document (or Comment) in the **Library window** and select the 'New Comment' option • Click on the Document name and on the 'New Comment' icon in the Library window toolbar, or • Click on the Document name and press **Ctrl+N** A *Re:<Documentname>* entry displays underneath the Document you are replying to, and the cursor becomes active in the 'Library ' tab so that you can create and edit your response.
2	Type in, format and save the contents of the Comment.

Create a Comment from external material

Step	Action
1	Open a file browser (such as Windows Explorer) and locate a file containing the material you want to use in your response.
2	Click on the file name and drag it into the **Library**

	window, over the Document to which you are replying. A prompt displays for you to specify whether to: • Create a new Comment containing the text of the file (the file name displays as the Comment name) or • Add the file to the original Document as a Model Link
3	If necessary, edit, format and save the contents of the reply.

Create a Comment based on a predefined template

Step	Action
1	Right-click on the appropriate Document name in the **Library window** and select the 'New Comment from template' option. A new 'Comment' icon displays in the hierarchy, and the 'New Document from Template' dialog displays.
2	Click on the **drop-down arrow** in the 'Template'

	field, and select a predefined template for the 'Comment' contents.
3	Click on the **OK button**. The template structure is displayed in the 'Library' tab.
4	Type in or paste the text of the Document.

When you have created the Comment

You can	Detail
Create links from the Comment	To elements and diagrams from the: • **Browser window** • **Model Search** • 'Views' tab of the **Focus window**, or • **Package Browser**
Create links from the Comment to Library objects	These links can be to related Libraries: • Categories • Topics and • Documents

Create links from the Comment to external files	These links can be either in the text of the Comment or on the parent Category, Topic or Document in the **Library window** (the link is added to the *Model Links* folder for the Library item).
Add resources to the Comment	It is simple and convenient to link to the resources that are the subject of discussion or that illustrate points in the discussion.
Receive replies to the Comment from other users	The purpose of the **Library window** is to discuss aspects of development, so you can expect to receive replies to the Comments that you have posted, and to create Comments on the material posted by your colleagues.

Protection Against Editing

When you have created a Library Category, Topic or Document containing text, the item text is exposed to change by any user who has access to the **Library window**. You can protect the item against unrestricted changes by setting a password on it. The password only refers to that item; to protect the text of Topics, Documents or Comments subordinate to the item, you set a password on each of them as well.

When the password is set, only those users who have the password can edit that item, and only when they specifically enter the password to unlock that item. Any other user of the Library window can still view the protected item.

The password does not protect the item from operations on the item as a whole, including being deleted.

Notes

- The use of a password on an item is indicated by an exclamation mark against the item in the **Library window**; a blue icon indicates that a user with the password has opened the item, and a red icon indicates that the item is locked
- When you click on an item to set a password, the item opens; you can edit the item after you have set the password, while it is still open

- Once a password-protected item is closed, any user who wants to edit the item must first select to unlock the item for editing and then enter the password set on the item
- Unlocking is specific to the user; the item remains locked to other users until they enter the password themselves
- If the password becomes unnecessary, you can remove it from the item

Edit an Item

When you have created a Category, Topic, Document or Comment, you edit the text within it using the Team Document editor. This is based on the Document editor, which is used to edit report documents and Linked Documents throughout Enterprise Architect.

You can also change the name of the item by selecting it, pressing **F2** and typing the new name.

Access

Open the **Team Library window** using one of the methods outlined here, then double-click an item or select the item and press the **Enter key**, to open the Team Document editor.

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Option Descriptions

The editor menu option descriptions are grouped according to the actions you are performing.

Actions
Creating and importing documents
Configuring the editor page display and formatting tools shown
Incorporating stylesheets, special texts and Tables of Contents Managing the base styles in the Normal.rtf style template file
Moving through, searching and selecting text
Formatting characters and text strings
Formatting paragraphs and text blocks
Inserting tab points
Inserting sections, columns and page breaks, and repaginating
Inserting and editing page headers and footers, and footnotes and endnotes
Inserting tables

Inserting hyperlinks and bookmarks (including using the 'New', 'Link to Existing Element' and 'Hyperlink' options on the 'Create' context menu)
Inserting images, OLE objects, frames and drawing objects
Printer set up and printing documents
Check spelling and use of terms
Tracking, accepting and rejecting changes to the text
Protecting document text from accidental change
Create and refer to definitions of Glossary terms in the **Project Glossary** (using the 'Create | Glossary Definition' context menu option)

Notes

- To undo one or more immediately previous edits, press **Ctrl+Z**, or select the 'Layout > Diagram > Undo' ribbon option; you can still undo a change even after you have saved the change

- To redo one or more immediately previous undone edits, press **Ctrl+Y**, or select the 'Layout > Diagram > Redo' ribbon option

Add Object Links

In the **Library window** you can create hyperlinks from a Document to any elements and diagrams that are associated with it. This helps you to:

- Rapidly navigate to the objects in the **Browser window**
- Access the element properties, and
- Open a diagram directly from the Library window

You can also create links to:

- Other Categories, Topics and Documents in the Library window
- External files from a file browser

Facilities

Facility	Action
Associate an element, diagram, external file or Library item with a message	Drag the object over the required Category, Topic or Document in the **Library window**, from the: • **Browser window** • **Package Browser** • 'Views' tab of the **Focus window** • **Model Search** window or • External file browser

	To create a link to another Library window item, press **Ctrl** as you drag that item over the required Category, Topic or Document. If it does not already exist, a *Model Links* folder is created under the selected Library item, and the link to the dragged object is added to the folder.
Associate an external file with the message text	From any browser, click on and drag the file name into the text of the message. The filename becomes a link to the file; click on it to display the contents of the file. The external file name also becomes a link to the file within the message when you drag the filename onto a Topic to create a Document.

Review Options

To review an object in the *Model Links* folder, right-click on the object to display the navigation context menu.

Option	Action
Open	Open the linked diagram or external file.

	Alternatively, double-click on the diagram link.
Properties	Display the 'Properties' dialog for the selected element or diagram. Alternatively, double-click on the element, attribute or operation link to open the 'Properties' dialog of the object.
Create (Edit) Linked Document	Either: • Open the 'New Linked Document from Template' dialog, to begin creating a new Linked Document on the element, or • Open the 'Linked Document Editor' to change an existing Linked Document
Find in all Diagrams	Open the diagram in which the element is used, or display a list of several diagrams in which the element has been used.
Find in Project Browser	Highlight the element or diagram in the **Browser window**.
Locate Item	Highlight, in the **Library window**, the Library item linked to the message. Alternatively, double-click on the link in

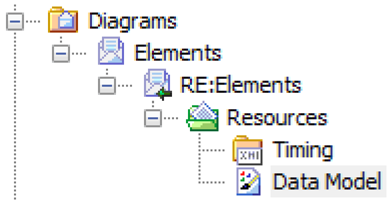
	the *Model Links* folder.
Delete Model Link <name>	Delete the association between the Document and the object.

Library Resources

Whilst having a discussion through the **Library window**, it is convenient to link to the resources that are the subject of discussion or that illustrate points in the discussion. Such resources include:

- XMI files of Packages within the current project
- Active **Profiler** reports
- Images of currently-active diagrams
- Images currently captured on the clipboard
- Bookmarks to currently active websites

You can link to such resources from Category or Topic notes, or from a Document. The resource links are created in a *Resources* folder underneath the selected Category, Topic or Document, as shown:



Access

Open the **Team Library window** using one of the methods outlined here, then;

Right-click on <object> | Share Resource | <resource type>

You create the *Resources* folder by creating a link to a resource underneath the selected Category, Topic or Document. Similarly, you delete the *Resources* folder by deleting the last resource within it. Having added a resource, you can right-click on it and use a further context menu to:

- Reimport the Package XMI files to the model or
- Display the images

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Search Library

The **Library window** provides the facility to search the titles of all Library items, to locate items referring to a specific subject.

Search the Library

Step	Action
1	In the **Library window** toolbar, click on the (Search) icon. The search panel displays underneath the toolbar.
2	In the blank field, type the text string to search for.
3	If required, select the 'Match Case' checkbox to locate text with the same case as the search string.
4	If required, select the 'Match Whole Word' checkbox to locate only complete words that match the search string.
5	Click on the **Find button**. The search locates the first instance of the search string in the title of a Category, Topic, Document or

	Comment, and displays the contents of that item in the **Library window**.
6	To locate further instances of the text string, click again on the **Find button**.
7	To close the search panel, click again on the 'Search' icon in the toolbar.

Library Options

You can change the loading behavior of the **Library window**, using the 'Library Server Options' dialog. If you change the settings, the new loading behavior is not applied until you restart the Library.

Access

Open the **Team Documents window** using one of the methods outlined here, then right-click in the Team Documents window and select 'Options'.

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Library Options

Option	Action
Preload items less than	Type the threshold item size (in KB) below which the items will be preloaded

	and above which item data is only loaded when selected.
Load item data when required	The fastest loading option. **Library window** data is only loaded on demand; for example, when you read a Document.
Preload all data	Caches the entire contents of the Library on load; this takes longer to load but, once completed, navigating the **Library window** is faster.

Library Connections

If you are modeling in a different model from the rest of your team, you can switch to Libraries from other Enterprise Architect models, including models located on servers. This connects only to the Library for the selected model; it does not change the model open in the **Browser window** or anywhere else in the system.

Access

Open the **Team Documents window** using one of the methods outlined here, then either:

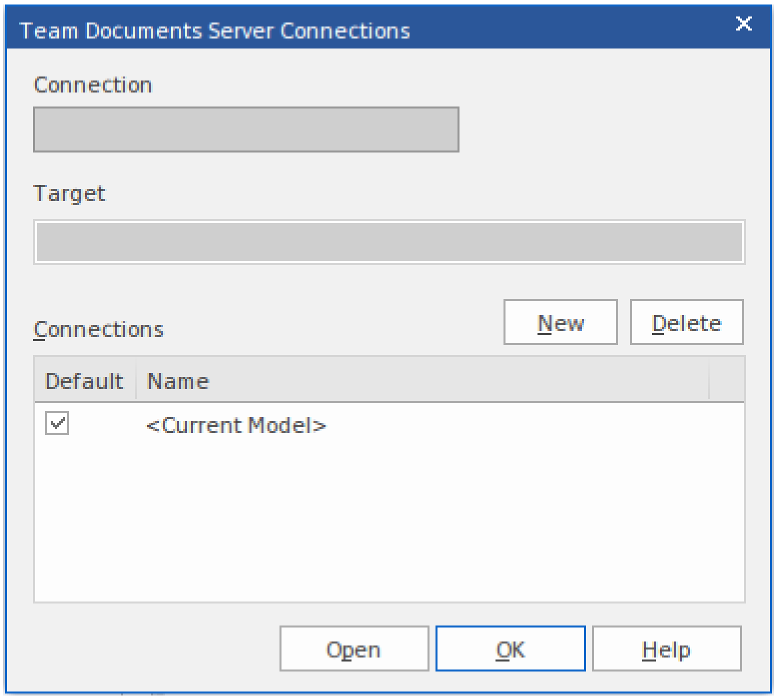
- Right-click on the Team Documents window and select 'Connections', or
- Click on the 'Connection Options' drop-down field and choose 'Configure Connections'

Ribbon	Start > Collaborate > **Team Library**
Keyboard Shortcuts	**Ctrl+Alt+U**

Switch to another Library

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Select the appropriate model name from the drop-down list in the '<current model>' field, to connect to the Library for that model.

If the required model is not listed, click on the '<Configure Connections>' option; the 'Team Documents Server Connections' dialog displays.



Go to Step 3.
</td></tr>
<tr><td>2</td><td>
Alternatively:

Right-click anywhere in the Library window and select the 'Connections' option; the 'Team Documents Server Connections' dialog displays.
</td></tr>
</table>

	In the list in the 'Connections' panel, select the checkbox against the appropriate model name to connect to the Library for that model, then click on the **Open button**. The connection now switches to the Library in the selected model. If the required model is not listed, go to Step 3.
3	Click on the **New button** and select the appropriate type of connection from the list. • For a local project file, a browser dialog displays through which you can search for and select the appropriate model • For a model in a DBMS data repository, select the 'Connection Wizard' option to display the Microsoft 'Data Link Properties' dialogs, through which you can locate and connect to the repository • For a Cloud connection, the 'Cloud Connection' dialog displays in which you specify the details of the model connection on the Cloud • For an external connection string, a prompt displays in which you type in or paste that connection string
4	When you have selected and opened or connected to the required Enterprise Architect model, and returned to the 'Team Documents Server Connections' dialog, the model name displays in the 'Connection Name' field and in the 'Connections'

	panel.
5	Select the checkbox against the model name and click on the **Open button** to connect to the Library for that model. The **Library window** now shows the discussions in the selected model.

Fields/Options on the 'Team Documents Server Connections' dialog

Option	Action
Connection	Verify the name of the selected model.
Target	Verify the path to the selected model.
New	Click on this button to display the list of connection types you can select as the first step in identifying the model for a new Library connection.
Delete	Click on this button to delete the currently selected connection from the 'Connections' list. There is no

	confirmation prompt; the connection is immediately removed from the list.
Connections	View all Library connections created; click on the checkbox against the required connection.
Open	Click on this button to switch the Library to the selected connection and to close the dialog.

Project Calendar

The Project Calendar provides a project management overview in calendar format of the deployment of resources, timeframes for tasks, and upcoming project events such as meetings and milestones. The calendar displays in the **Diagram View** workspace, consisting of a:

- **Calendar** panel, displaying months of the year
- Diary panel sectioned into days or weeks
- Toolbar at the top of the window, which enables you to define what information is displayed and how it is formatted

Access

Ribbon	Start > Collaborate > **Calendar**

Features

Screen area	Description
Calendar Panel	The **Calendar** panel, when viewed normally on the screen with other

	windows and panels, displays a calendar of three months that by default includes the current month. By closing or reducing other windows and panels on the screen, and depending on the size of your screen, you can show the months for a longer period, to a maximum of 3 years and six months. You can review data going back over a long period, and plan ahead well into the future; these periods can theoretically span ten years or more, if required. To display future or past months, either: • Click on the arrows in the names of the months on the left and right of the top row of months, or • Click and hold the mouse on the name of a month so that a list of months and years displays, then move the mouse forwards to scroll up the list or backwards to scroll down the list; when you reach the required month, ensure that it is highlighted and release the mouse button On the calendar, today's date has a red border; if you have scrolled the calendar so that today's date is not shown, click on the second icon in the toolbar ( ) to position the current month in the top left

	of the calendar with today's date highlighted.
Diary Panel	The 'Diary' panel displays a set of day fields, each of which can contain one or more markers for an event or task. The content of the display is determined by the selections you make in the toolbar, and principally by the object type you select from the first drop-down field: • Project Calendar • Allocated Resources • **Project Tasks** The structure of the display depends on the period you want to review, specified using the icons on the toolbar: • 1 day (Project Calendar only) • 5 days (Mon - Fri) (Project Calendar only) • 7 days (Mon - Sun) • 31 days However, in the '**Calendar**' panel you can highlight specific periods of between 1 and 7 days (Project Calendar only) and 14, 21, 28, 35 and 42 days, to display just those periods in the 'Diary' panel. If you select a period of between 1 and 7 days, each day is divided into one hour

	time intervals; you can adjust the time intervals for these periods, using the toolbar. For the current day, the current time is also highlighted. Also, if you click on today's date in the 'Calendar' panel the 'Diary panel' changes to show the shortest period (7 days or 1 day) for the object type, again with adjustable time intervals for the times of day. For displays of 7 or more days, you can scroll up or down to display the information for earlier or later dates; if you scroll away from today's date, you can return to it by right-clicking anywhere on the display and selecting the 'Show Today' option.
Toolbar	The toolbar options modify what is displayed on the 'Diary' panel, and help you to add certain kinds of information. The icons and fields in the toolbar, from left to right, have these functions: • Add New <object> - enables you to create a new record for an event or task • Show Today - re-focuses the 'Diary' panel and '**Calendar**' panel on today's

	date, for any object type • 1, 5, 7, 31 - sets the number of days displayed in the 'Diary' panel • First drop-down - identifies the type of information to display: Calendar events, allocated Resources, or Tasks • Second drop-down - identifies the type or characteristic of object to filter for (and depends on the value selected in the first field) • Third drop-down - identifies the subtype of event, such as Planning Meeting or People off sick or, for Allocated Resources, the element type to filter for • Options: - Configure Event Subtypes - displays the 'Configure Subtype' dialog, which you use to define categories of event to record on the Calendar - Time Scale - where the display includes times of day; enables you to reset the time interval to numbers of minutes - Show End Time - for the Project Calendar, where the times of day are NOT shown and an event occurs within one day, this shows or hides the time at which the event

	finishes (the start time displays automatically) - Show Time As Clocks - toggle between showing start and end times in digital format and as a clock face - Compress Weekend Days - in 31-day format, toggle between showing Saturday and Sunday as separate fields and a pair of half-fields - Show ToolTips - toggle between showing and hiding mouse roll-over tool-tips

Notes

- The Project Calendar is available in the Corporate, Unified and Ultimate Editions of Enterprise Architect
- In the Lite Edition of Enterprise Architect, you can view **Calendar** entries but not change them

Calendar

Project Calendar is a display mode of the project **Calendar** facility. In Project Calendar mode, the 'Diary' panel shows a selected period of time containing flags for each event that takes place in or through that period. These events can be, for example, meetings, staff absences or commitments, product releases or public holidays.

You can customize the range of events that you record, using the 'Configure Subtype' dialog.

Access

Ribbon	Start > Collaborate > **Calendar** > Project Calendar

Record an event in the Project Calendar

Step	Action
1	Double-click on the required day, or the first day in a longer period.

	The 'Project Event' dialog displays.
2	In the 'Subject' field, type the name of the event.
3	If the event is to take place at a specific place, in the 'Location' field type the name of the place or room.
4	In the 'Category' field, click on the **drop-down arrow** and select the appropriate categorization: • Event (such as an external trade show, or internal presentation) • Meeting (whether internal or external) • Milestone/Objective (such as a product test or release) • People (an absence or commitment of a specific staff member)
5	If the event is likely to occupy one complete day, select the 'All day event' checkbox; this: • Places the event icon at the top of the day field in the Diary, above any time sections • Hides the time sections of the 'Start time' and 'End time' fields
6	In the Start time and End time fields, specify the start and end dates and/or times of the event. In the date section of each field, either: • Click on the **drop-down arrow** to display the

	current month and select the month and date, or • Click on the 'spin' arrows to roll the date forwards or backwards by one day at a time In the time section of each field, click on the hour or minute components (which are separate) and either: • Type in the required time or • Click on the 'spin' arrows to roll the time backwards or forwards
7	In the 'Event Type' field, click on the **drop-down arrow** and select an appropriate type label for the event; the options change depending on the value you selected for the 'Category' field. This provides the fill color for the event icon, as indicated by the fill box next to each option.
8	In the 'Defined as' field, click on the **drop-down arrow** and select the indicator for whether the event is internal or external to your organization.
9	If the event consists of a telephone call, select the 'Phone Call' checkbox.
10	In the description field, type any notes required on the event; these display in the mouse roll-over tool-tip for the event on the 'Diary' panel.

11	If this event repeats at regular intervals, click on the **Recurrence button** and complete the 'Event Recurrence' dialog.
12	Click on the **OK button** to save the event and display it on the **Calendar**.

Define a recurring event

Step	Action
1	In the 'Start' and 'End' fields, specify the start and end times of the event; click on the hour or minute components (which are separate) and either: • Type in the required time or • Click on the 'spin' arrows to roll the time backwards or forwards
2	In the 'Duration' field, click on each of the day(s), hours and minutes portions and either type or 'spin' to the required value. The hours and minutes portions are linked to the 'Start' and 'End' fields, so that: • As you edit the 'Start' field or the 'Duration' field,

	the 'End' field adjusts to maintain the **duration** relative to the start time • As you edit the 'End' field, the 'Duration' field changes to match the difference between the start and end times
3	In the 'Recurrence pattern' panel, select the appropriate radio button for the frequency of the event. As you select the radio button, the fields on the right of the panel change to further define when the event recurs.
4	Select the appropriate radio buttons and field values, with this guidance: • Daily can be every 1, 2, 3, 4, 5 or 6 days, or every day of the working week • Weekly is on one or more specific days of the week, the events being separated by a period of between 1 and 51 complete weeks • Monthly can be on a specific date or a specific day of the month, the events being separated by a period of between 1 and 11 complete months • Yearly can be on a specific date or a specific day of a specific month
5	In the 'Range of recurrence' panel, in the 'Start' field, specify the date on which the event cycle begins.

	Click on the day, month and year components (which are separate) and either: • Type in the required value or • Click on the 'spin' arrows to roll the date backwards or forwards
6	Select the appropriate radio buttons to indicate that the recurrence cycle: • Has no defined end point • Ends after a specific number of occurrences of the event (type in the number) • Ends by a specific date (enter the date)
7	Click on the **OK button**, and again on the 'Project Event' dialog. The event icon displays at all points in the **Calendar** where it is scheduled to occur, as defined in the 'Event Recurrence' dialog; the recurrence is indicated by a graphic depicting two recirculating arrows.
8	If the recurrence is no longer required: • Double-click on the icon for any occurrence of the event, to display the 'Project Event' dialog • Click on the **Recurrence button** to display the 'Event Recurrence' dialog • Click on the **Remove Recurrence button**; the 'Event Recurrence' dialog closes • Click on the **OK button**; the 'Project Event' dialog

	closes Only the first occurrence of the event remains in the **Calendar**.

Notes

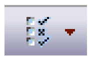
- The Project Calendar is available in the Corporate, Unified and Ultimate Editions of Enterprise Architect
- In these Editions, if security is enabled you must have 'Manage Project **Calendar**' permission in order to create, update or delete Project Calendar events; if security is not enabled, you can change data without this permission
- In the Lite Edition of Enterprise Architect, you can view Calendar entries but not change them
- You can transport a calendar of defined events between projects, using the 'Configure > Model > Transfer > Export Reference Data' and 'Import Reference Data' ribbon options

Configure Event Subtypes

The 'Configure Subtype' dialog enables you to define additional types of event to record on the Project Calendar, such as:

- Define a new event type within a select event category
- Change an existing event type
- Delete an existing event type

Access

Ribbon	Start > Collaborate > **Calendar** :  | Configure Event Subtypes

Manage the event types for your project

Step	Action
1	On the 'Configure Subtype' dialog, in the 'Category' field, click on the **drop-down arrow** and select the appropriate category for the event.

2	Click on the 'Type' field and type a suitable name for the event type (or select an existing event from the list under the 'Category' field).
3	In the 'Color' field, click on the **drop-down arrow** and select or define a color for the event icon.
4	Click on the **Save button** to save the new or edited event type to the list for the specified category. Click on the **New button** if you are going to create another event type.
5	If the event type is no longer required, click on the **Delete button**.
6	If required, you can change the sequence of the event types in the displayed list, using the 'Up Hand' and 'Down Hand' buttons at the bottom of the dialog.
7	Click on the **OK button** to close the dialog; any new event types are available for use in the Project Calendar.

Notes

- In the Corporate, Unified and Ultimate Editions of

Enterprise Architect, if security is enabled you must have 'Manage Project **Calendar**' permission in order to create or delete Project Calendar event subtypes; if security is not enabled, you can change data without this permission

- You can transport your defined event types between projects, using the 'Configure > Model > Transfer > Export Reference Data' and 'Import Reference Data' ribbon options

Allocated Resources

'Allocated Resources' is a display mode of the project **Calendar** facility, that you can use to:

- Review the allocation of resources across the project over a period of time
- Review the status of the work assigned to those resources
- Display and edit the details of the task assigned to a resource
- Allocate further resources to an element
- Delete a resource allocation from an element
- Create and send an email to the resource allocated to an element

In 'Allocated Resources' mode, the 'Diary' panel shows the selected period of time (see the *Project Calendar* topic), with at least one icon representing each element in the project to which a resource has been allocated during that period. If an element has more than one allocated resource, each element:resource combination is represented separately.

Each icon shows the element name and resource name, and indicates the status of the assigned work with one of these symbols:

- a green square, indicating that the resource has been assigned the work
- a green tick, indicating that the resource has completed the assigned work

- a red square, indicating that the resource has not completed the assigned work
- a square divided diagonally with green and red halves, indicating that the assigned work is to be completed within one working day

Typically, while the work is in progress a resource is represented by:

- An icon with a green square on the day the work is planned to start, and
- An icon with a red square on the day the work is planned to finish

When the work is complete, the icons on both days display the green tick.

Resources are initially allocated to elements through the:

- **Resource Allocation window**, or
- 'Allocated Work' tab of the **Personal Tasks** window

You can then edit these allocations through either of those windows or through the Allocated Resources Calendar itself.

Access

Ribbon	Start > Collaborate > **Calendar** > Allocated Resources

Allocate Resources

Option	Action
Display/edit details of an allocated resource	Either: • Double-click on any icon for that element:resource combination, or • Right-click on the icon and select the 'Properties' option The 'Assigned Resources' dialog displays, showing the details of the assignment of the resource to a task on the element. This dialog has the same content, format and functions as the **Resource Allocation window**, in Item mode.
Add resource to element	Right-click on any icon for the element and select the 'Assign Resource to <element name>' option. The 'Assigned Resources' dialog displays, showing the start and end dates both set to the date from which you selected the icon, and the 'Allocated Time' field set to '1'; all other fields are blank. This dialog has the same content, format and functions as the **Resource Allocation**

	window, in Item mode. Specify the resource and the role or task that resource is performing, and define the period for which the resource is allocated to the element.
Message Resource	Right-click on any icon for the element:resource combination and select the 'Message Resource <resource name>' option. The 'Model Message' dialog displays, on which you create and send your message to the resource allocated to the element.
Delete resource from element	Right-click on any icon for the element:resource combination, and select the 'Delete Resource from <element name>' option. A prompt displays to confirm the deletion; click on the **Yes button**. The icon and any corresponding icons for that element:resource combination are deleted from the calendar, and the resource is no longer allocated to that element.
Locate element in diagrams in	Right-click on any icon for the element, and select the 'Find in all Diagrams' option.

which it is used	If the element is used in only one diagram, that diagram displays. If the element is used in more than one diagram the 'Element Usage' dialog displays, listing the diagrams in which the element occurs. Select the required diagram and click on the **Open button** to display that diagram. This option also operates on Port and Part Property Type Classifiers.
Locate element in Browser window	Right-click on any icon for the element, and select the 'Find in Project Browser' option. The area of the **Browser window** containing the element is brought into focus and expanded, and the element is highlighted.
Locate resource allocation start date corresponding to allocation end date	Firstly, click on the end date icon for the element:resource combination to highlight it; the corresponding start date icon is also highlighted. If the start date icon is not in view, right-click on the end date icon and select the 'Show Start/End' option; the display scrolls to show the start date and the start date cell is highlighted.

Locate resource allocation end date corresponding to allocation start date	Firstly, click on the start date icon for the element:resource combination to highlight it; the corresponding end date icon is also highlighted. If the end date icon is not in view, right-click on the start date icon and select the 'Show Start/End' option; the display scrolls to show the end date and the end date cell is highlighted.
Refocus display on today's date	Right-click anywhere on the display and select the 'Show Today' option. The display returns to today's date, which is highlighted and outlined.

Notes

- The Project Calendar is available in the Corporate, Unified and Ultimate Editions of Enterprise Architect
- In these editions, if security is enabled you must have 'Configure Resources' permission in order to allocate resources to or remove resources from the Project Calendar; if security is not enabled, you can change data without this permission
- In the Lite Edition of Enterprise Architect, you can view **Calendar** entries but not change them

- As the start and end icons for a completed task are identical, and one-day tasks have only one icon, the methods to show the corresponding start date or end date for an icon are also useful to show whether the icon is for a start or end date, or for a one-day task; alternatively, double-click on the icon and review the allocation dates

Project Tasks

Project Tasks is a display mode of the project **Calendar** facility, that you can use to:

- Review the tasks across the project over a period of time
- Review the progress of those tasks
- Create new tasks
- Display and edit the details of the task
- Allocate a resource to a task
- Delete a task
- Create and send an email to the resource assigned to a task
- Create and send an email to the owner of the task

In Project Tasks mode, the 'Diary' panel shows the selected period of time (see the *Project Calendar* topic), with at least one icon representing each project task scheduled during that period. The icon represents an independent record of the task - there are no comparisons or validations of the tasks. Therefore you can have separate icons for the same task, with different resources allocated or no resources allocated; you can even have identical task records, if these serve a purpose for you.

Each icon shows the task name and resource name, and indicates the status of the task with one of these symbols:

- a green square, indicating that the task has been scheduled
- a green tick, indicating that the task is complete

- a red square, indicating that the task is incomplete
- a square divided diagonally with green and red halves, indicating that the task is to be completed within one working day

Typically, while a task is in progress it is represented by:

- An icon with a green square on the day the work is planned to start, and
- An icon with a red square on the day the work is planned to finish

When the work is complete, the icons on both days display the green tick.

Tasks can be created and managed through this view of the Project Calendar, or the:

- Project Tasks view for the whole project, or
- 'Project Tasks' tab of the **Personal Tasks** window

Access

Ribbon	Start > Collaborate > **Calendar** > **Project Tasks**

Manage Project Tasks

Option	Action
Create a task	Either: • Double-click on the date cell in which the task is to start, or • Right-click on the cell and select the 'Add New Task' option, or • Click on the down-arrow next to the first icon in the **Calendar** toolbar, and select the 'New Task' option The 'Task Details' dialog displays, through which you create the task.
Display and edit a task	Either: • Double-click on the task • Right-click on the cell and select the 'Properties' option, or • Click on the down-arrow next to the first icon in the **Calendar** toolbar, and select the 'Properties' option The 'Task Details' dialog displays; if necessary, edit the information.
Allocate a resource to a task	Certain tasks might not initially be assigned to a resource, but might later require specific assignment to finish them off. Open the task to edit it, click on the

	drop-down arrow in the 'Assigned' field and select the required resource.
Delete a task	Right-click on any icon for the required task and select the 'Delete <task-name>' option. You are prompted to confirm the deletion; click on the **Yes button**.
Create and send a message to the task owner	Right-click on any icon for the task and select the 'Message Owner' option. The 'Model Message' dialog displays, on which you create and send your message to the user who owns the task (as identified in the 'Task Details' dialog). If the task does not have a defined owner, this option does not operate.
Create and send a message to the resource assigned to the task	Right-click on any icon for the task and select the 'Message Assigned <resource name>' option. The 'Model Message' dialog displays, on which you create and send your message to the resource assigned to complete the task (as identified in the 'Task Details' dialog). If the task does not have a defined resource, this option does not operate.

Locate task start date corresponding to task end date	Firstly, click on the end date icon for the task to highlight it; the corresponding start date icon is also highlighted. If the start date icon is not in view, right-click on the end date icon and select the 'Show Start/End' option; the display scrolls to show the start date and the start date cell is highlighted.
Locate task end date corresponding to task start date	Firstly, click on the start date icon for the task to highlight it; the corresponding end date icon is also highlighted. If the end date icon is not in view, right-click on the start date icon and select the 'Show Start/End' option; the display scrolls to show the end date and the end date cell is highlighted.
Refocus display on today's date	Right-click anywhere on the display and select the 'Show Today' option. The display returns to today's date, which is highlighted and outlined.

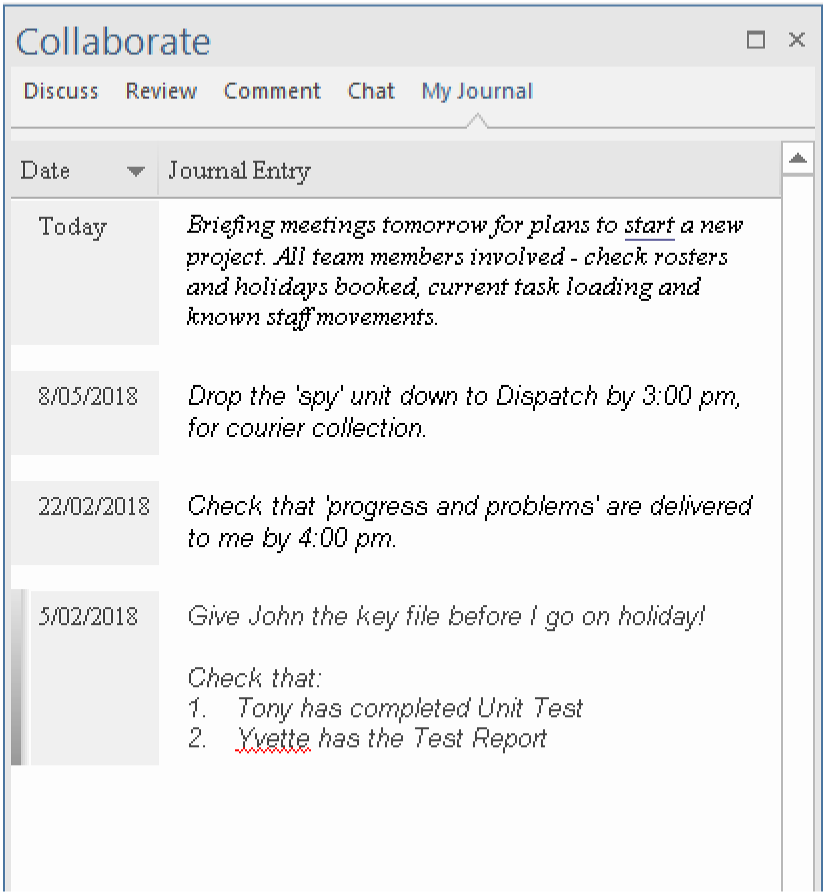
Notes

- The Project Calendar is available in the Corporate, Unified and Ultimate Editions of Enterprise Architect
- In the Lite Edition of Enterprise Architect, you can view **Calendar** entries but not change them

Introducing the Journal

Enterprise Architect provides a great facility for maintaining a personal daily journal, in which you can type all kinds of ideas, comments, notes, suggestions, events, to-do lists and other reminders of what you have done or intend to do within the model. This is a good way to keep the momentum flowing day to day. The facility is simple to use, allowing you to quickly jot down your thoughts as they occur to you.

The 'Journal' tab is part of the **Collaborate window**, which allows you to take notes as you engage in formal or informal discussions and chats with other team members, as well as during your work on other screens and dialogs.



Because the Journal entries are specific to your login, this facility is only available within a model for which User Security has been enabled.

Access

Ribbon	Start > Collaborate > Journal > Journal
Keyboard Shortcuts	**Ctrl+9** > Journal

Creating the first Journal Entry

When you first access the 'Journal' tab, it has the single entry 'Today' in the 'Date' column. You can type freely in the 'Journal Entry' column against 'Today', including carriage returns and text formatting. Right-click on selected text to access the editing options, which include:

- Creating a Glossary definition from the text, and inserting existing definitions in the text
- Generating a new element in the same Package, with the selected text as the name and linked to the text
- Creating a link from the selected text to an existing element in the model
- Creating a hyperlink to a wide range of target objects,

including image files, diagram images, web pages, text files, Help topics and Enterprise Architect commands

- Marking selected text for special translation, or to be omitted from automatic translation
- Searching for instances of the selected text in a range of sources (options derived from the 'Code Editor' context menu)
- Undoing the latest change to the text
- Editing the text, with cut, copy, paste and delete, selecting all the Journal Entry text entered for a day, setting fonts, and setting paragraph format
- Printing the selected text, and checking meanings and synonyms using the online Thesaurus

When you have finished typing your note, click off the **Collaborate window**.

You can return to the Journal Entry at any time and:

- Add further notes; you use the same entry to record all your notes and comments on the element throughout the day
- Edit the existing text, including reformatting
- Delete text or complete notes; select the text and click on the **Delete key** or use the 'Delete' context menu option

Journal Entries Each Day

Every day, when you open Enterprise Architect and the

'Journal' tab, it has a 'Today' item at the top, against which you record the day's Journal entries. Beneath the 'Today' item are the entries for previous days, identified by the date on which you made them. This only lists dates on which you have made an entry; there are no blank lines for days on which you did not make an entry.

As well as formatting and editing today's entry, you can edit the entries for previous days. This means you can remove information that is no longer relevant (such as old reminders) or things you listed to be achieved that you have now completed. On the other hand, you can also highlight entries that are still significant, and refer back to them from the 'Today' entry.

Collaborations Window

The **Collaborations window** provides a simple yet comprehensive summary of the Review, Discussion, Comment and Chat messages sent and received in the model. It also provides the **Model Mail** facility. Each category of message is presented on a separate tab, showing details such as the name of the element under discussion, the date the message was posted, and in some cases the opening text of the post. You can perform operations either on individual items or on the list as a whole, and double-click on an item in one of the lists to display that item as the focus of the **Collaborate window**.

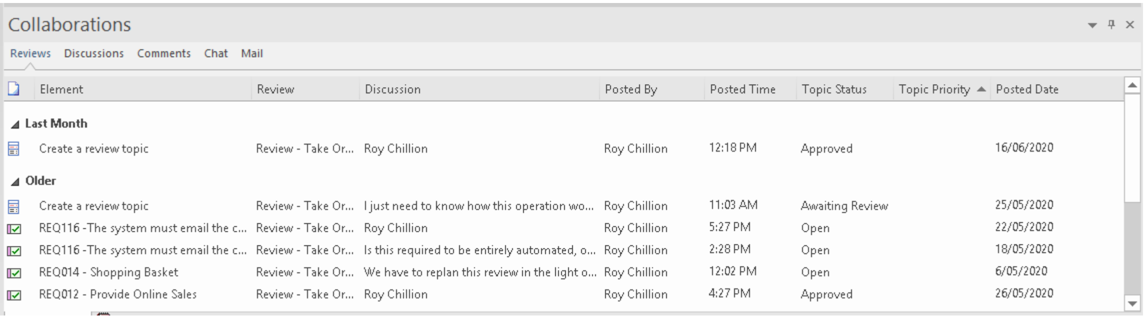
Access

Ribbon	Start > Collaborate > **Discussions** > Discussion History Start > Collaborate > Discussions > Chat History Start > Collaborate > Review > Review History Start > Collaborate > Mail Start > Desktop > Share > Collaborations > <appropriate tab>

Keyboard Shortcuts	**Alt+2** > Collaborations > <appropriate tab> Ctrl+Alt+9 > <appropriate tab>

The Reviews tab

The 'Reviews' tab shows the activity in Formal Reviews across the model, listing the items in which activity has occurred.



On this tab, apart from using the context menu options described in the General Features table, you can also double-click on an item both to open its Review discussion in the **Collaborate window** and, at the same time, to highlight the element under Review in the **Browser window**.

Note that where the 'Discussion' field shows a user name, it indicates that the posting was to add that user as an Approver (effectively, the user name is the text of the discussion). For further information on Review discussions, see the *Reviews* Help topic.

The Discussions tab

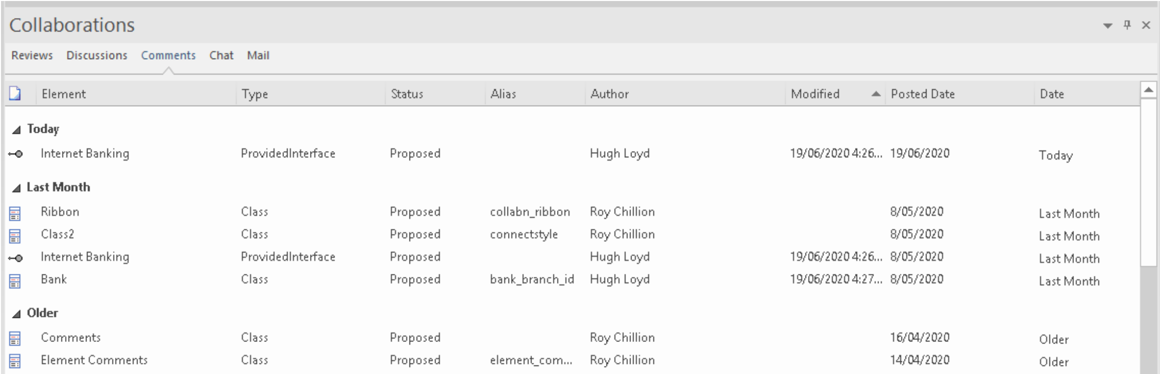
The '**Discussions**' tab shows the Discussions that have been recorded on elements across the model, listing the elements under discussion and showing the text of the topic created against that element. Where there is more than one topic, the element is listed again for each topic. The tab does not list discussions concerning diagrams.

On this tab, apart from using the context menu options described in the *General Features* table, you can also double-click on an item both to open the Discussion topic in the **Collaborate window** and, at the same time, to highlight the element under discussion in the **Browser window**. Note that the timeframe in the Collaborate window must be able to accommodate the age of the posting; if you have listed Discussions from last month and the timeframe in the Collaborate window is three days, the Discussion topic will not display.

For further information on Discussions, see the *Discussions* Help topic.

The Comments tab

The 'Comments' tab lists the elements across the model against which comments have been posted, showing details of the element and the date on which the comment was posted.



On this tab, apart from using the context menu options described in the *General Features* table, you can also double-click on an item to open its comments in the **Collaborate window**. You can then add to or edit text in any comment posted on the element. You can also edit the comments in the preview pane, one of the features discussed in the *General Features* table.

For further information on comments, see the *Comments* Help topic.

The Chat tab

The 'Chat' tab lists Chat conversations that you have been a party to. These conversations can be between yourself and one other user, or you might have participated in a Chat with a group of users.

The tab defaults to the Summary, showing the last conversation you have had with each user or user group you have communicated with, and the last of your correspondents to send or receive a post in that conversation. A red arrow next to the users name indicates that the person sent you a message, and a green arrow indicates that you sent a message to that person - the icons are very visible and enable you to tell at a glance which conversations might require a response from you.

You can change the focus of the list by right-clicking on the panel and selecting the 'Visible Timeframe' option, then selecting to list all conversations from today, or from the last 7, 30 or 90 days. The tab then also shows the number of messages posted in each conversation - in the 'Total' column - and the names of the participants and the number of posts made by each person - in the 'Participants' column. You can also double-click on an item to display the complete conversation in the **Collaborate window**, as long as the window has been set to display posts from the appropriate number of days in the past.

For further information on Model Chats, see the *Model Chat* Help topic.

The Mail tab

The 'Mail' tab provides all of the intray facilities of the **Model Mail** feature, as described in the *Model Mail* Help topic. Sent messages are listed and displayed in a tab of the main work area.

General Features

When the **Collaborations window** displays, it lists the items in which activity has occurred in date/time order. On the 'Reviews', '**Discussions**' and 'Comments' tabs the items for today are listed first, in the Today group, followed in sequence by the items active Yesterday, This Week, Last Week, This Month and Last Month. The 'Chat' tab by default only shows the last posts made by each of your correspondents in a conversation, but you can adjust the timeframe to show all Chats posted over that period, grouped under the same category headings.

The Collaborations window automatically refreshes after a short interval, which you define. You might notice the window flicker when it refreshes.

The tabs default to displaying a number of columns, as shown in the earlier illustrations, but you can remove information you don't need by dragging column headings out, and add information by right-clicking on the heading row, selecting the 'Field Chooser' option and dragging additional column headings into place. You can also filter the display according to field value, and regroup the items by setting up a group and subgroup hierarchy in the Group Box. For more information on tailoring the headings and content, see the *List Header* Help topic.

Option	Description
Review	Select this option to open the **Collaborate window** at the 'Review' tab and/or load the selected element as the element in focus.
Manage Reviews	Select this option to display the details of all reviews recorded in the model, in the Reviews view.
Go to this Discussion	On the 'Reviews' tab, this option opens the **Collaborate window** at the 'Review' tab and/or loads the topic thread for the selected element. Alternatively, click on the item and press the **Spacebar**.
Discuss	On the '**Discussions**' tab, this option opens the 'Discuss' tab of the **Collaborate window** and/or displays the discussion topics for the selected element. Alternatively, click on the item and press

	the **Enter key**.
Comment	On the 'Comments' tab, this option opens the 'Comment' tab of the **Collaborate window** and/or displays the Comments for the selected element.
Chat	On the 'Chat' tab, this option opens the 'Chat' tab of the **Collaborate window** and/or displays the topics for the selected Chat.
Edit Discussion	On the '**Discussions**' tab, select this option to display the Discussion in the 'Discuss' tab of the **Collaborate window**. You can then set the priority or status, delete a post or add a further discussion topic or response.
Properties	Select this option to display the properties of the selected element under discussion, in the 'Properties' dialog.
Find in Project Browser	This option locates and highlights the element in the **Browser window**.
Find in Diagrams	This option locates and selects the selected element in any diagram in which

	it has been used. If the element has been used in more than one diagram, the diagrams are listed in the 'Element Usage' dialog and you can select from that list. The empty dialog is also displayed if the element is not used in any diagram.
Visible Timeframe	Select this option to display a short menu of numbers of days, from which you can select a value to list items recorded up to that many days in the past. You can therefore expand or reduce your list of posted messages.
Check for Update Every	This option displays a short menu of time options - 1, 2, 5 or 10 minutes - as the interval between automatic refreshes to pick up new postings. Click on the interval you want to apply. On the 'Comments' tab, if you are working in a local or .eap file, this menu also has an 'Enabled' option that you select to allow refresh of the Comments list, or de-select to prevent refresh of the list.
Show by Status	On the 'Reviews' tab, select this option to list either all the Review comments (the 'All' sub-option) or only those against

	elements having a selected element status. When you select the 'Configure' option, a dialog displays listing all the possible status values for the element. Click on the checkbox against each status value you want to filter the displayed items for. You can click on the **Select All** or Clear All buttons to select or clear all checkboxes and reset one or two of them. When you have made your selection, click on the **OK button** to filter the elements under review.
Filter Approvals	On the 'Reviews' tab, select this option to set or clear a filter on the list of Reviews according to the assignment of Approvers to the review items. Select: • Approvals Only - to list only items that have assigned Approvers • My Approvals - to list only items where you are an assigned Approver • Hide All Approvals - to hide all items that have assigned Approvers • No **Filter** - to remove the filter and list all items, with or without assigned Approvers
Show All	On the 'Reviews' tab and '**Discussions**'

Posts	tab, select this option to show all Discussions posted, not just the most recent one.
Show Preview Pane	Select this option to open a pane on the left or right of the window, or at the bottom of the window, displaying the text of the currently-selected review topic, discussion thread, comment or chat message. As you click on different items in the window, the text in the pane immediately reflects the new selected item. You can also hide the preview pane if you no longer need it. You can edit Comments that you have created previously, in the preview pane as well as in the **Collaborate window**.
Refresh	This option will refresh and redisplay the currently-selected tab of the **Collaborations window**. You can also press **F5** to refresh the contents of the window.

Collaboration Support in Diagrams

Enterprise Architect provides a simple yet extremely useful facility to notify you immediately via the current diagram when any Discussion postings are made concerning elements on the diagram, or when Chat postings are made to you by specific users or groups. Having seen the notification, you can click on it to get instant access to the conversation, without having to establish who sent the message, on what element, or by what means. Two applications of this facility are:

- You can set up a diagram that monitors Chats with your team members or other regular project contacts (each represented by an Actor element), notifying you of any Chat messages from each of them and allowing you to immediately respond to each message without having to establish connections in the **Collaborate window**; you could display this diagram as a floating diagram parked in a convenient section of your work area
- You can work on and discuss elements in the diagram and maintain the conversation without having to re-establish focus in the Collaborate window and in the diagram with each exchange

As an additional boost to your work, a context menu is available against each element on any diagram, containing options that give you instant access to the tabs of the Collaborate window and the 'Model Message' dialog.

There are three steps in the process of setting up

Collaboration Support in a diagram:

- Create/open and populate the diagram in which you will be working and/or monitoring for new Discussion or Chat posts
- Set a flag on elements in the diagram and on Chat user groups to monitor for messages (not required for messages from individual users)
- Set a value for the 'Support Collaboration' option in the diagram 'Properties' dialog

Set Up Diagram

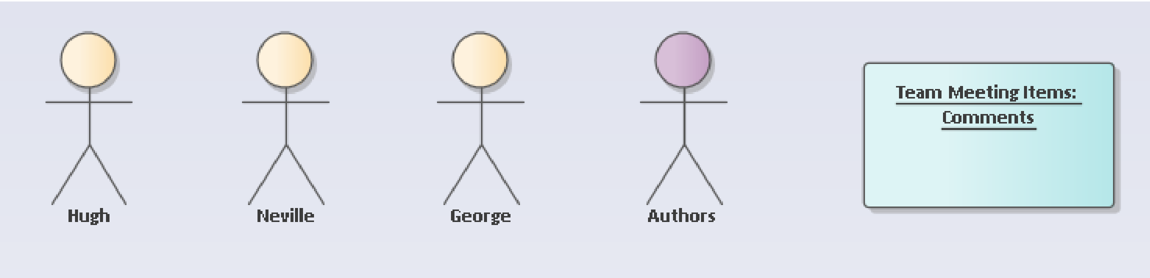
If you want to monitor **Discussions** on elements that you are working on in a diagram, you can do so in any type of diagram containing any type of element. Simply create or open the appropriate diagram and add and/or configure the required elements.

If you want to monitor Chat messages from certain people (team members, other project groups, internal stakeholders; anyone who is defined in User Security as a user or member of a user group) you add an Actor element to the diagram for each one of those people or groups. In theory you could add the Actor to any diagram that you might be working in, but it is far more practical to hold all your 'Collaboration' Actors in one separate diagram (a Use Case diagram for preference) that is always available to monitor receipt of messages during the day.

In either case:

1. Create/open the diagram and add to it the required number of Actor elements (perhaps use the 'Add Multiple Elements' facility - see the *Add Multiple Elements* Help topic).
2. Give each Actor element the name of the security user or user group it represents.
3. For each Actor element, in the 'Alias' field of the **Properties window**, type the user ID of the user that the element represents. If the Actor represents a user group, give the group ID the prefix *group* :: - for example:
   group:: LOB_analysis
4. Ask each user to place a user lock (or, for a user group, a group lock) on their Actor element, to allow 'locking user' identification of the element during the monitoring process. This also gives the user ownership of the Actor element for other purposes, and provides a level of security for their communications with you.

Your discussions diagram might resemble this:



The diagram contains three individual users, a user group, and an element against which discussion items can be raised.

Set Monitoring On

In order to display a notification whenever a user posts to a Discussion thread on an element, or to a group Chat with you, you need to first set the 'Monitoring' flag on the appropriate elements and/or Chat User Groups.

To set up monitoring for **Discussions** on elements, right-click on the element in the diagram and select the 'Collaborate | Monitor Discussions' option. For further information, see the *Discussions* Help topic. You must also set the interval between checks for new messages, as part of this process.

To set up monitoring for Chat User Groups, display the 'Chat' tab of the **Collaborate window**, click on the options icon in the top right corner, select the 'Monitor Groups for New Messages' option and select the User Group to monitor. For further information see the *Model Chat* Help topic. You must also set the interval between checks for new messages, as part of this process.

Messages sent to and from Chat threads with *individual* users (User Chats) are automatically monitored and display a notification without a flag specifically being set.

Set 'Support Collaboration' on the Diagram

The third step for enabling Discussion and Chat notifications on a diagram is to provide a value for the

'Support Collaboration' option in the diagram 'Properties' dialog.

Open the diagram, right-click on the background, select the 'Properties' option and, on the 'Properties' dialog, select the 'Element' tab. At the bottom right of the tab is the 'Support Collaboration' option.

Click on the **drop-down arrow** and select a value.

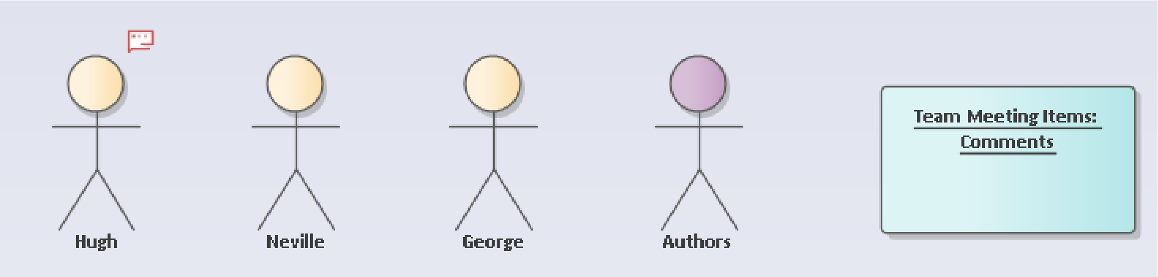
- Select 'None' to turn off Collaboration Support on the diagram for both **Discussions** and Chats, so no notifications of messages will be shown on the diagram
- Select any other value to activate Collaboration Support for Discussions; any element for which a Discussion message has been posted that you have not yet displayed will show a notification icon off the top left corner
- The other values operate on Actor elements that represent the project members and groups defined in User Security; when a Chat message is received by you from another project member, a notification icon displays on the diagram to the right of the Actor element representing that person
- Select 'With Alias' to check the Actor elements to locate the one that has the poster's user ID or group ID in the 'Alias' field; the Chat notification icon is displayed against that Actor element
- Select 'With Locking User' to check the Actor elements for the one that has been locked under the poster's user ID or group ID; the Chat notification icon is displayed against that Actor element

- Select 'With Both' to check both characteristics of the Actor elements - firstly for the user ID that locked the element and, if that is not found, for the 'Alias' field containing the poster's user ID

Click on the **OK button** to save the setting.

The Support Collaboration Facility in Operation

Using the example in the *Set Up Diagram* section, let us suppose that Hugh has sent a Chat message to the diagram owner. In the diagram, the owner sees the Chat notification icon appear against the 'Hugh' Actor element.



The icon displays against the element whether it is within the current Package or external to it.

If the 'Chat' tab of the Collaboration window is open, the owner can click on the Actor element to immediately display the latest message on the tab, with the cursor positioned ready to create a reply to that message. If the 'Chat' tab is not displayed, the owner can click on the notification icon, which will open the 'Chat' tab and show the Chat conversation, again ready to enter a response to the message.

If the 'Team Meeting Items' element has a Discussion item posted against it, the element will show the Discussion notification icon:

Again, if the 'Discuss' tab is not displayed, clicking on the icon opens the tab ready to continue the Discussion; if the tab is displayed, clicking on the element puts this Discussion in focus on the tab.

Context Menus

If you click on this icon, a short context menu displays with options that open the **Collaborate window** at the 'Comment', 'Discuss' and 'Review' tabs, and the 'Model Message' dialog respectively. Where Chat messages are possible, the 'Chat' option is also enabled. The same options are also available via the right-click context menu, 'Collaborate' option.

You can therefore open out your conversations on an element to include Comments, Reviews and **Model Mail** messages.

Note that when you click on the 'Send Message' option and display the 'Model Message' dialog, it automatically contains two hyperlinks - one to the selected element, and one to the diagram that contains the selected element. You specify the recipients of the message, and those people can use the links to directly access the diagram and element under discussion. The exception is if you have selected an Actor element with a user ID in the element's 'Alias' field; in this case the message is automatically addressed to the user represented by the Actor, but does not automatically contain any hyperlinks. You can simply send a message directly to the other user.