erwin Evolve 360

User Help Guide

erwin Evolve 360 – User Help Guide
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Version – v1

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Overview

Evolve 360 is a full-featured, cloud-based set of enterprise architecture tools using industry frameworks build to create a structure for your business by using your business data.

Evolve 360 comes with all that is needed for an editor called **Application Editor.** It helps create the new application for your product, choices from the wide variety of pre-loaded views. All you need to configure with the desired data to display the results. It comes with the in-built diagramming tool called **Diagrammer** to create and edit diagrams online.

To get started

Log in to the application with the provided credentials.

Steps to create an application:

1. To create the new application, click on **Create Application.**
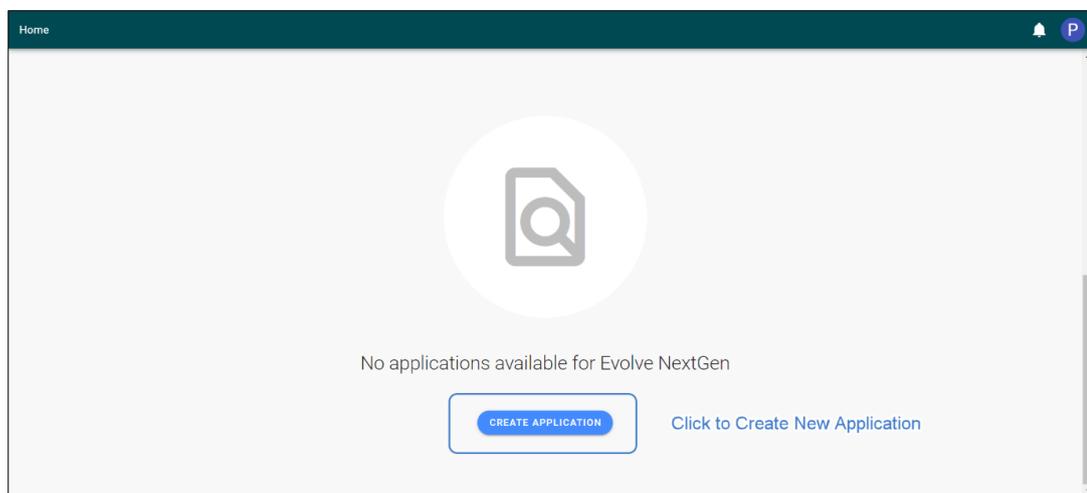
ℹ️ | If you do not have any previous licenses or its your first time, it takes you to the above shown picture to create a new application.

2. Enter **Name** > **Description** (if required)
   Select **Community Access** (if available) > select **Icon and Color.**
   Click on **Create.**

Create Application for Evolve NextGen

Name
Agile Management

Description
Agile Management

Communitiy Access

Icon

3. An **Application Editor** will be opened. To configure home view, click on **Home View (Not Configured).**

Evolve NextGen - Agile Management Editor

Evolve NextGen

- Evolve NextGen
  - All Views
  - All Object Type Views
  - Agile Management
    - Home View (Not Configur...
    - Object Type Views

Click here to configure the Home View
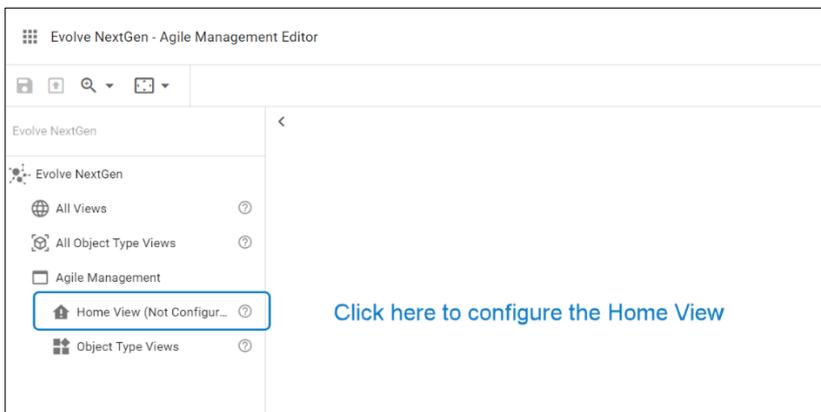
Configuring this, will be the landing page for your application.

4. Click on **Configure Home View** and then choose the kind of layout or view you wish to configure from the list.

Evolve NextGen - Agile Management Editor

Evolve NextGen / Home View

CONFIGURE HOME VIEW

Evolve NextGen - Agile Management Editor

Evolve NextGen / Home View

Filter

Layouts

- Menu
- Tabs
- Column Layout
- Row Layout
- Stream Layout
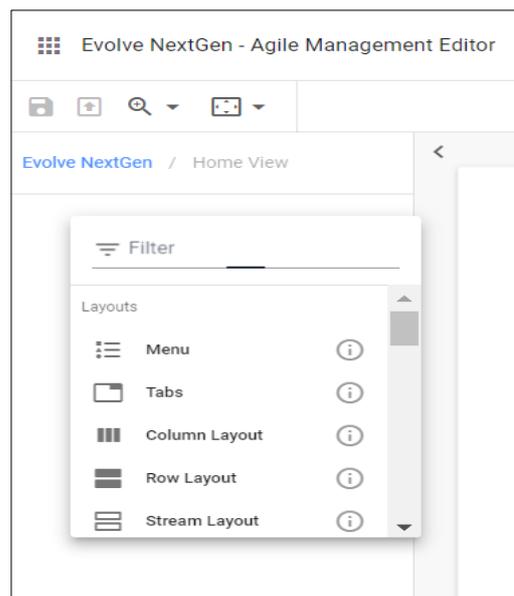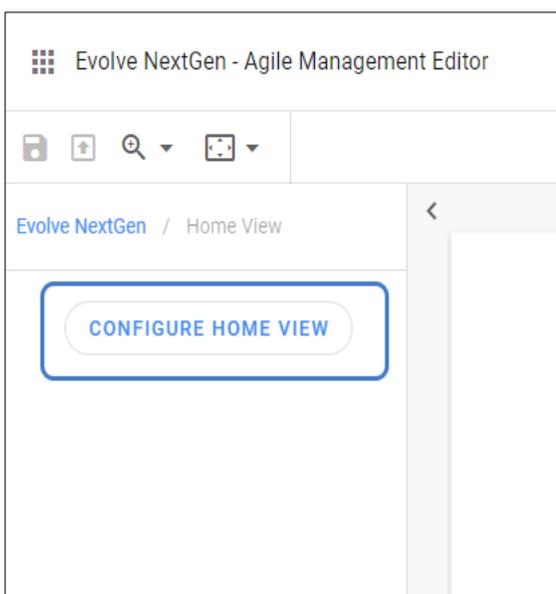
i To learn more about configuring layout and each type of view, please refer the respective view sections.

Metamodel

Object Types

How Do I Add A New Object Type?

1. Click on the profile, go to **Object Types**
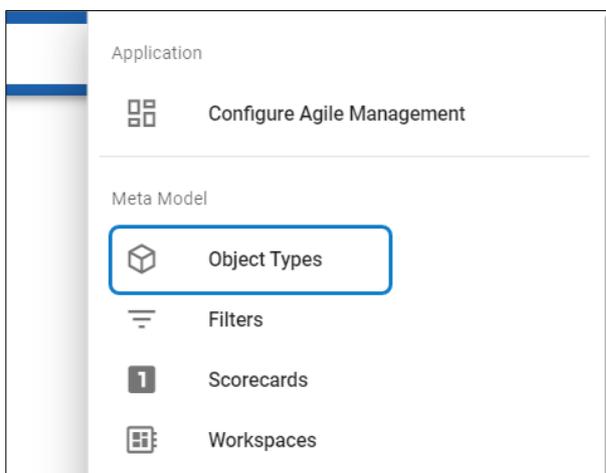
2. Click the **+** icon in the list view on the left-hand side of the screen, this will create a blank new **Object Type.**
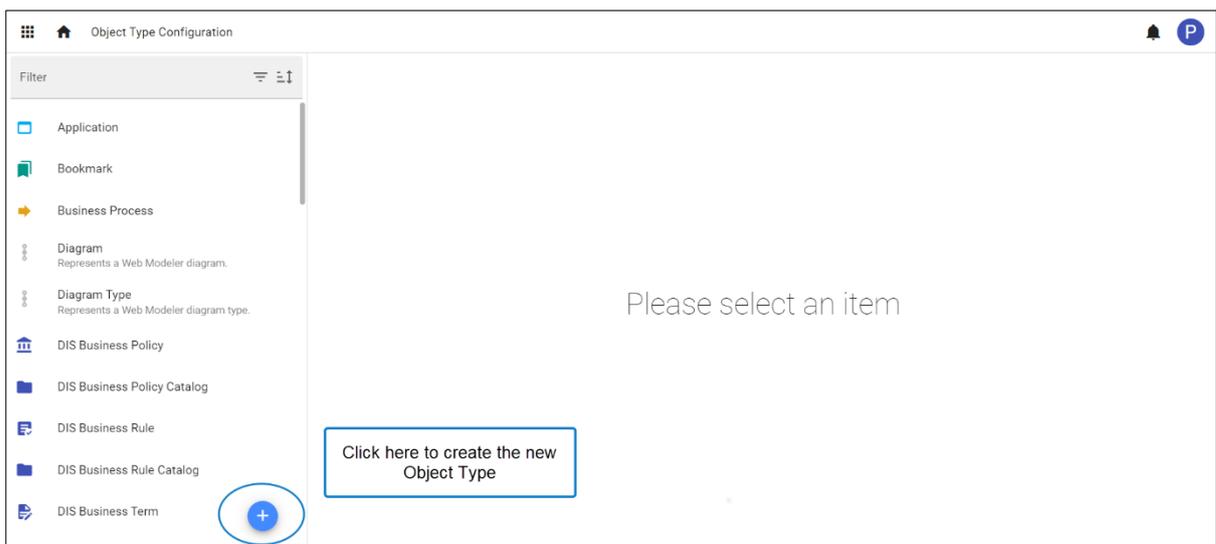
3. Enter **Name** and **Description**. Add an Icon and Color you wish to assign to the new object type.

To add **Attributes** and their definition, click on + icon on the right below corner of the screen.
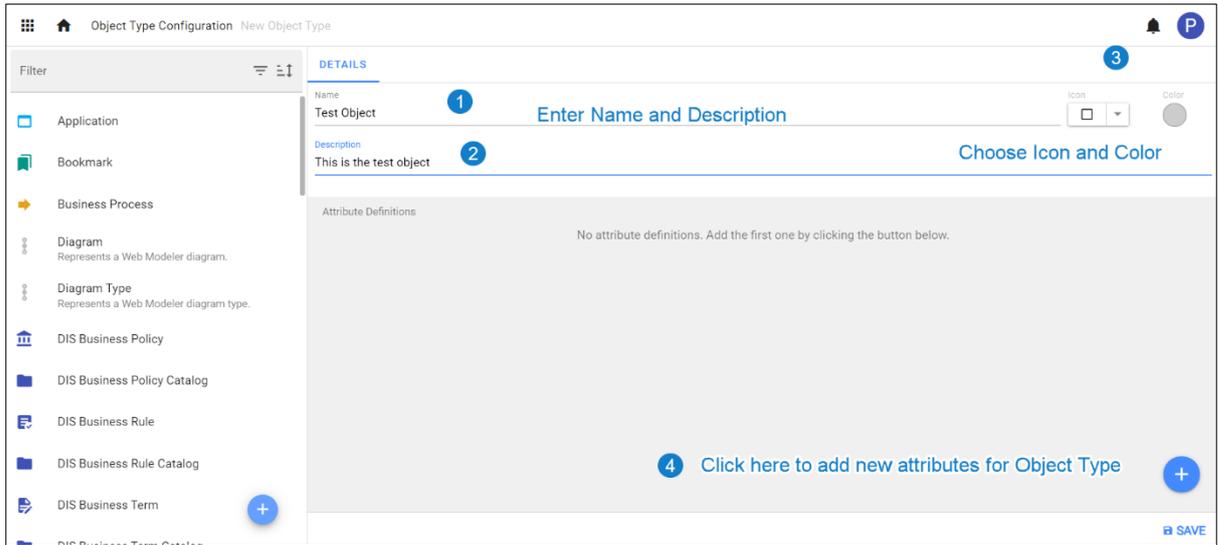
4. To add new **Attributes:**

    a. Select type of **Attribute** from the list.

    b. For each new Attribute you can provide a **Name, Description, Default Value** and choose if they are **Mandatory**.

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

    c. Click on **Save.**
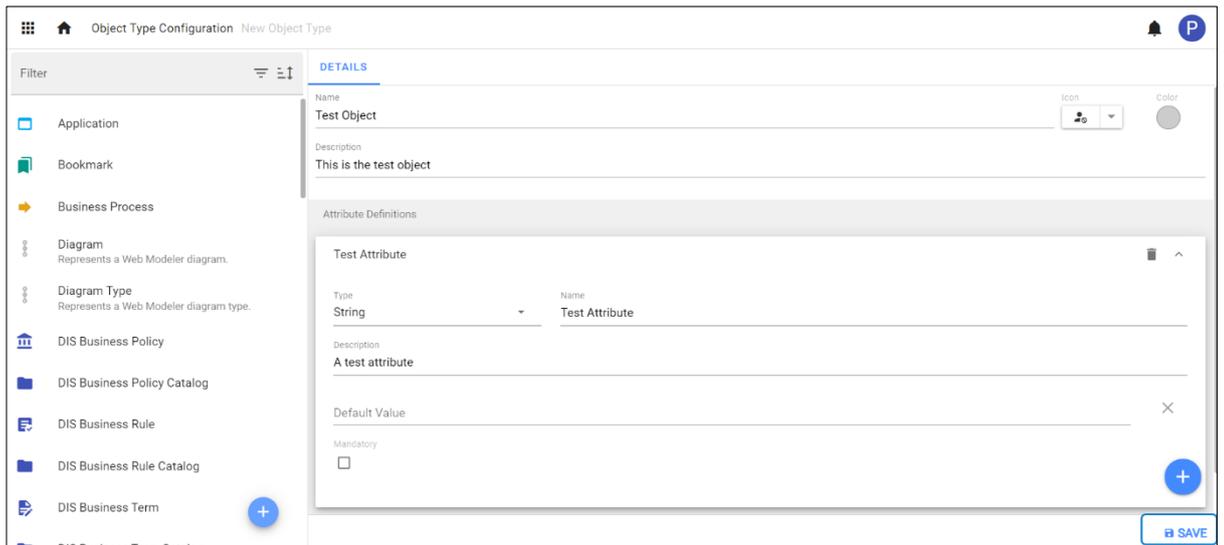
How Do I Add an Attribute to an Existing Object Type?

Available Attribute Types

1. Boolean - Simple true/false attribute
2. Integer - A whole number not a fraction
3. Real - Whole number/fraction/positive or negative
4. String - Text with a limit of 255 characters
5. URL - Set a URL for use as a clickable hyperlink or an Item Action
6. Date Time - Set a single point in time
7. Date Time Range - Define a range of time with a start and end date
8. List (Single) - Create a single choice list
9. List (Multiple) - Create a multiple-choice list
10. Array (Single) - Set a single choice key & value array
11. Array (Multiple) - Set a multiple-choice key & value array
12. Scorecard - Allows users to use a predefined 'scorecard' to perform equations on numeric attributes
13. Relationship List - Create a pick-list from a defined relationship and object type
14. Numeric Rollup – Roll up numeric values through relationships
15. Date Time Rollup – Roll up date-times through relationships
16. Date Time Range Rollup – Roll up date-time range through relationships
17. Long String - Text with a limit of 16,383 characters
18. Image - Allow users to attach an image to an object instance

Configuring an Attribute

1. Click on the profile, go to **Object Types.**

2. Search for a specific Object Type to add an Attribute or you can manually scroll through the list.

3. Click on the Object Type in the list to bring up its details.

4. Click on the blue + button in the bottom right of the details view.
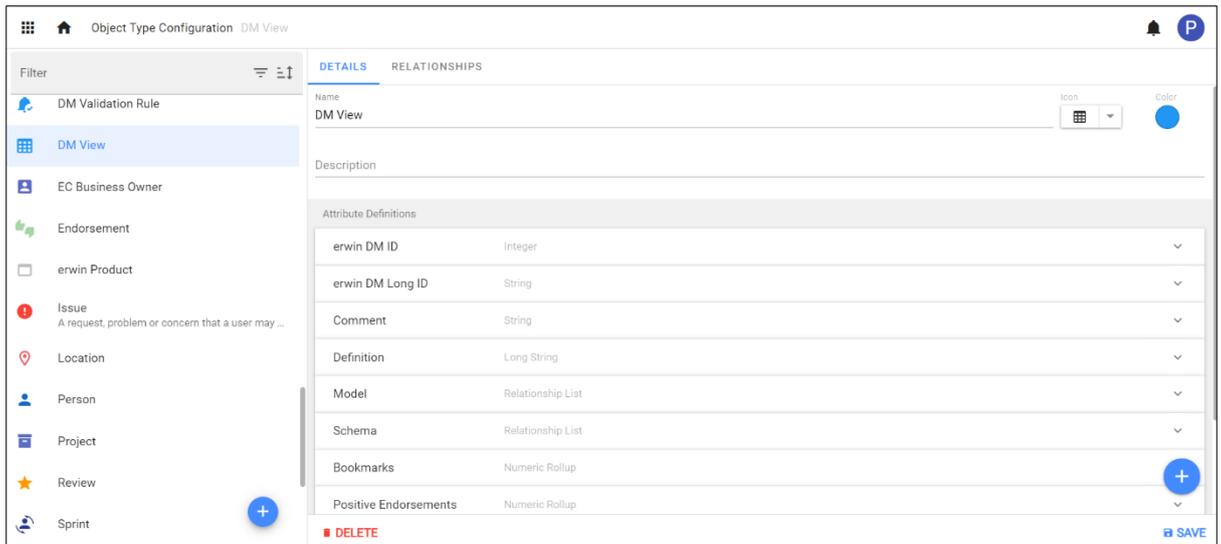
5. This will bring up a blank Attribute. Select your **Attribute Type**
6. Enter new **Attribute** a **Name & Description.**

   You can also set a **Default Value** for new Instances of the **Object Type**

   And finally, choose if your new Attribute is **Mandatory** by checking the box

   a. Some Attributes such as **List** or **Array** require additional information which are unique
      to that Attributes Type e.g. Key

7. Click **Save** in the bottom right of the screen to finish adding the new attribute.
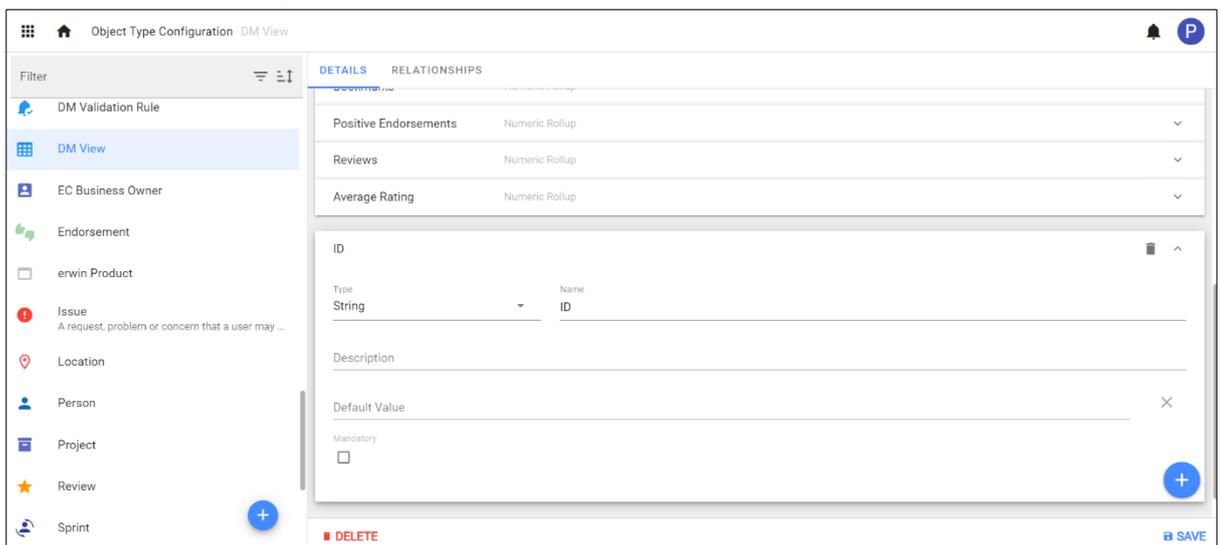
i   A default view is required to see Object Types. To create the default view, (see topic link)

Relationships

How Do I Create A New Relationship?

To add the **Relationships**, go to **Object Types** and select from the list you wish to add.

Click on the tab **Relationships.**
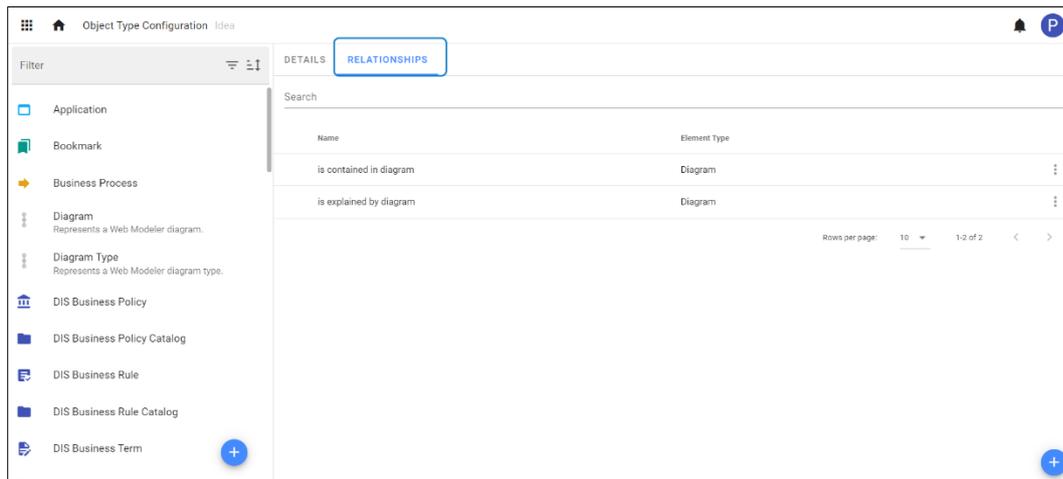
> ℹ️ By default, every Object Type will have its wildcard Relationships that exists in the model and populated automatically.

To add a new **Relationship**, click on + icon at the right bottom of the screen. This will show the four types of **Relationships** available.

1. Create Relationship Type
2. Create Relationship Type with Object
3. Create Parent Relationship Type
4. Create Child Relationship Type
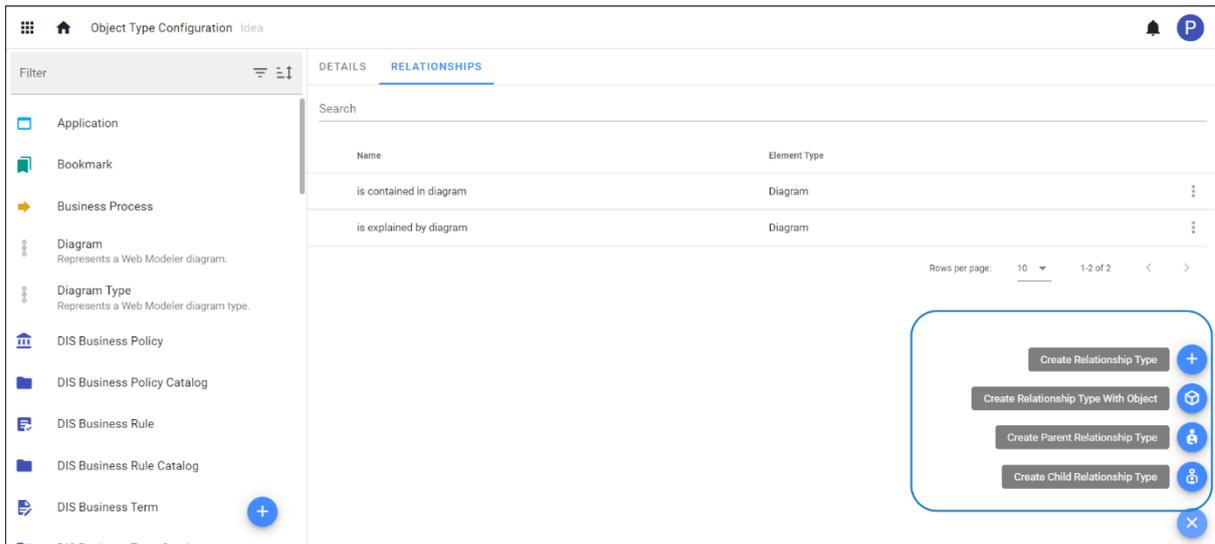
Create Relationship Type

To create a simple Relationship between the objects,

1. Go to **Create Relationship Type**.
2. Select **Source** and **Target**, enter **Source Name** and **Target Name.**
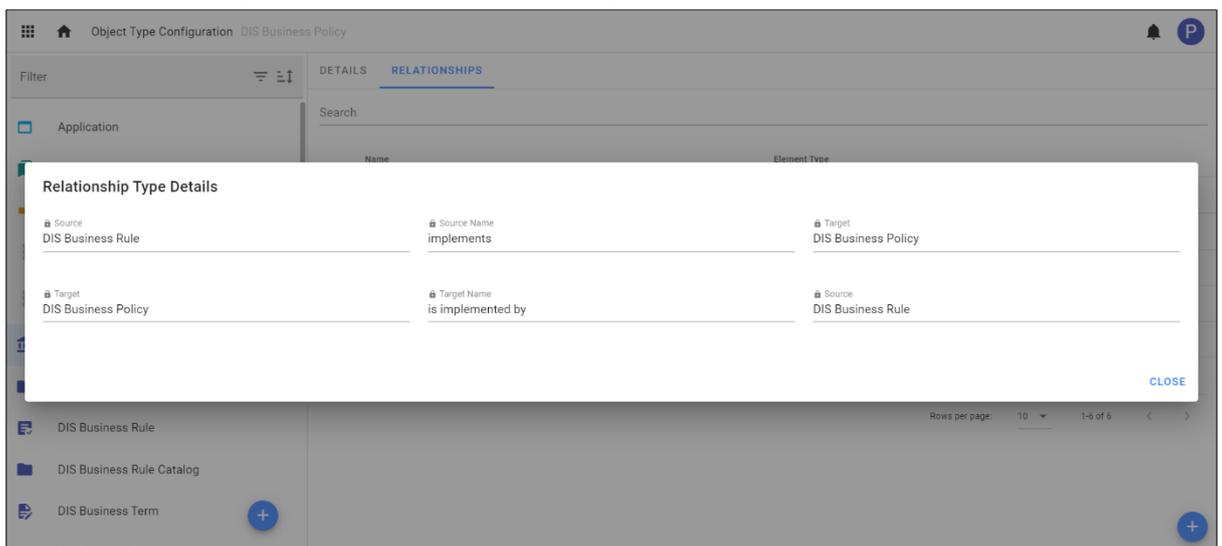
3. Click on **Save.**

Create Relationship Type with Object

Create Relationship Type with Object works similarly as the first relationship type, but if you want an object to represent the relationship, then select **Create Relationship Type with Object.**

This will create an Object Type with the Relationship.

1. Go to **Create Relationship Type with Object**.
2. Select **Source** and **Target**, enter **Source Name** and **Target Name.**

   Enter **Object Name** to display.
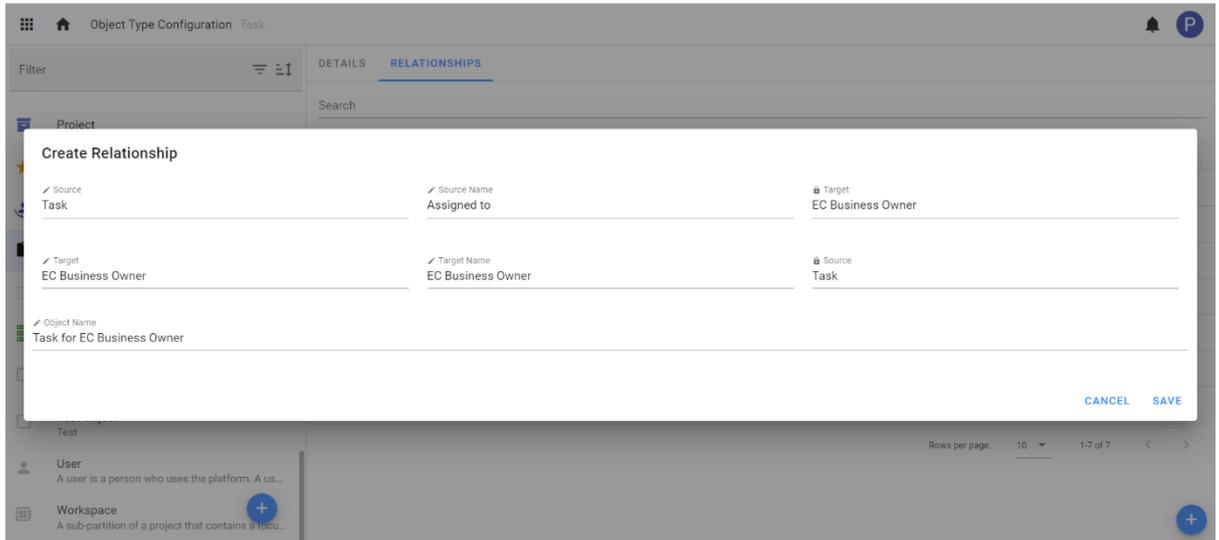
3. Click on **Save.**

Create Parent Relationship Type

Create Parent Relationship Type is used to relate the parent to the Child Object Instances.

To create parent-child relationship,

1. Go to **Create Parent Relationship Type**
2. Select **Parent** and **Child**, enter **Parent Name** and **Child Name.**
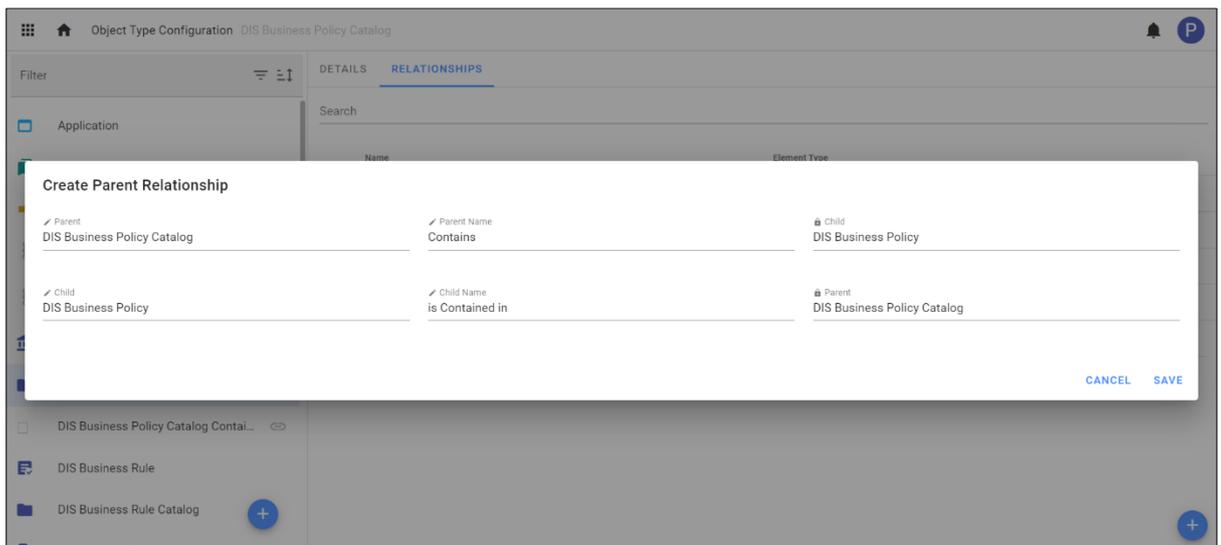
3. Click on **Save.**

---

i | Enter Parent and Child names that explains its relationship.

Create Child Relationship Type

Create Child Relationship Type is used to relate the child to the parent Object Instances.

To create child-parent relationship,

1. Go to **Create Child Relationship Type**
2. Select **Parent** and **Child**, enter **Parent Name** and **Child Name.**
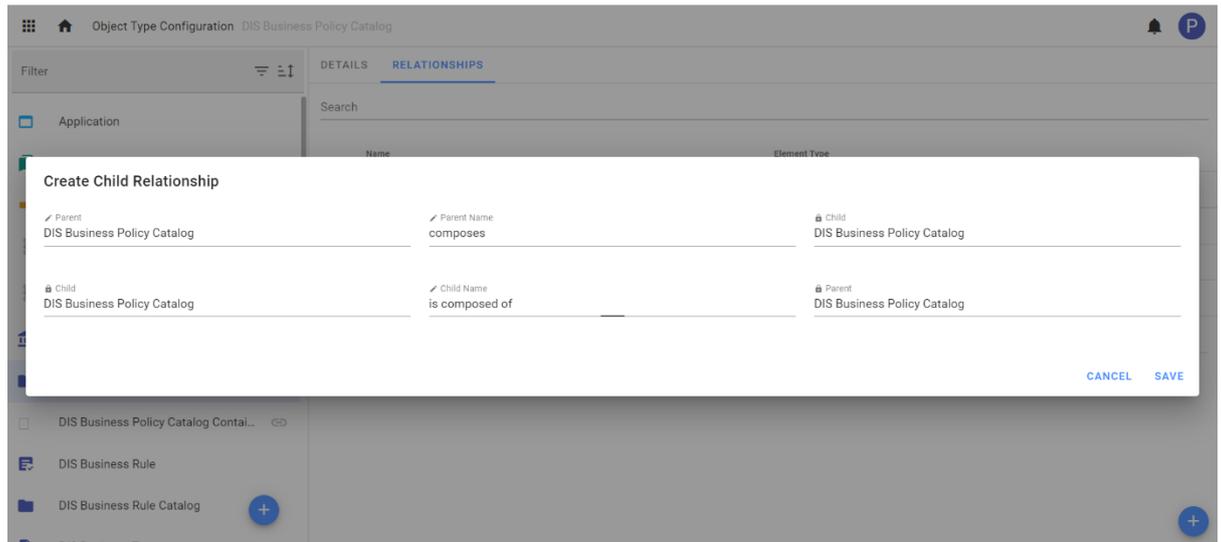
3. Click on **Save.**

Filters

How Do I Create A New Filter ?

1. Click on the profile, go to **Filters**
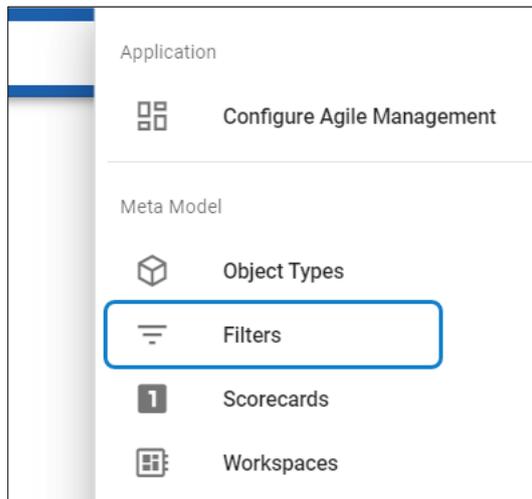
1. Click the ＋ icon in the list view on the left-hand side of the screen, this will create a blank New **Filter.**
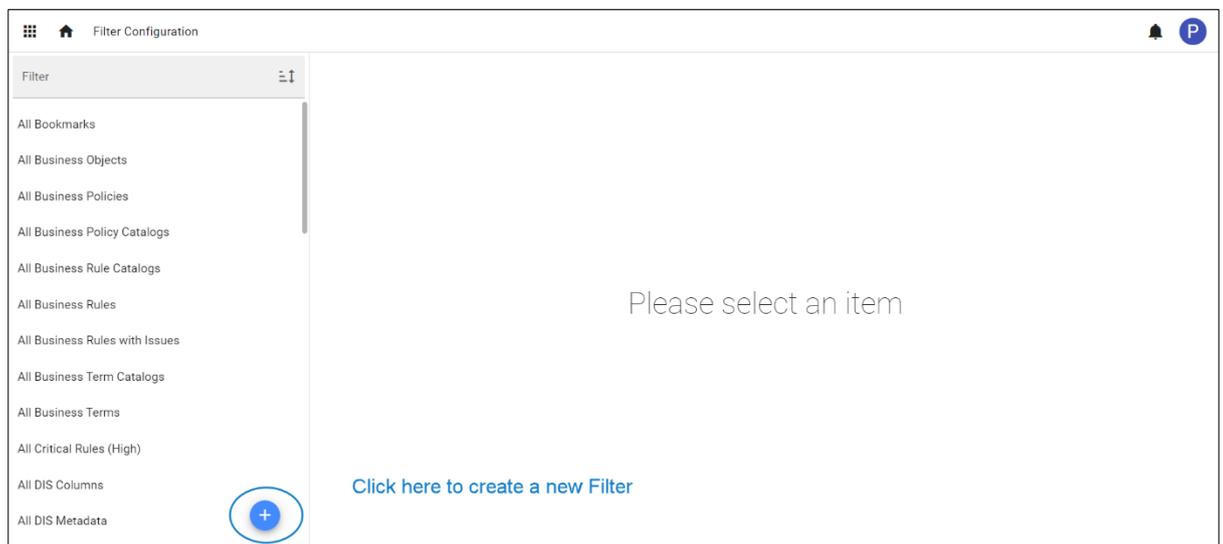
2. Enter **Name** and **Description**. Add **Parameters** if you wish to.

3. Select the Object Type you wish to filter by.

   If you wish to filter only by **Object Type** with no further criteria, press the **Trash icon** on the additional criteria and click **save.**

This will create a filter which display all Business Terms as shown in the below figure.
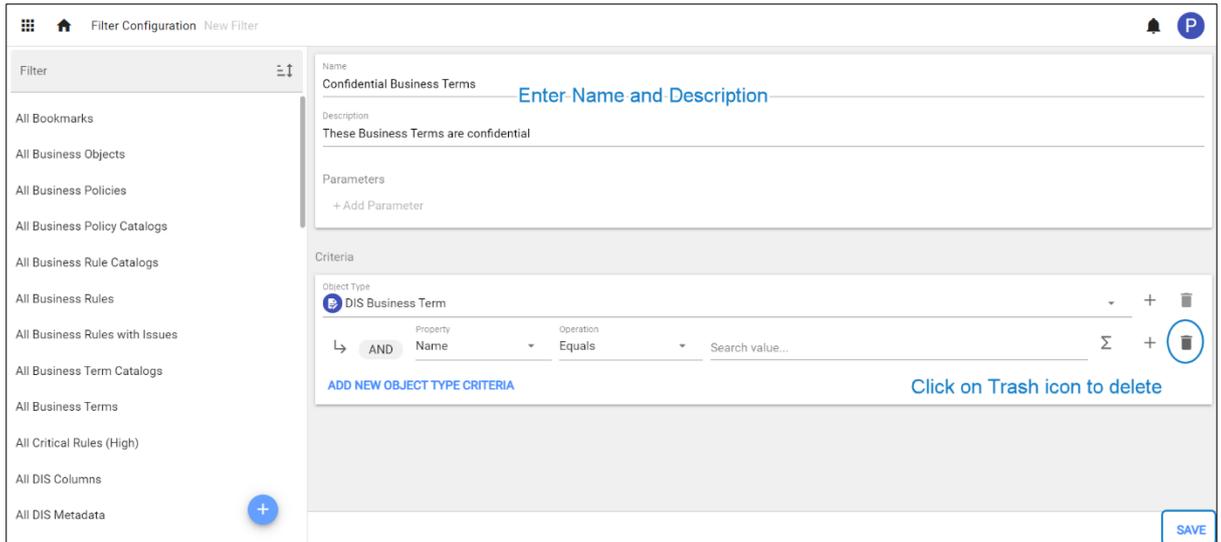
4. To add the further criteria, press the Object Type Criteria '+' icon next to the Object Type.

    i.   First additional operator will be **AND**, every additional operator afterwards will be an **OR**.

    ii. Select the object type criteria you wish to filter by.

         There are 4 main criteria categories

         - 'Is Object' – You can select individual Objects of that Object Type

         - 'Use Filter' – Will only show Objects of your selected Object Type that appear as results of the selected filter

         - 'Generic Properties' – Properties that are of all Object Types

         - 'Attribute Properties' – Attributes of that specific Object Type

    iii. Select the **Property**. Depending on the **Property** you select, it presents with different operators.

         - 'Is Object' – Equals, Does not equal

         - 'Use Filter' – Is in filter, Is not in filter

         - 'Generic Properties' – Equals, Does not equal, Starts with, Does not start with, Contains, Does not contain, Ends with, Does not end with

         - 'Attribute Properties' – Equals, Does not equal, Has value, Does not have value

    iv. Enter the Value. Depending on the criteria you selected, you need to either enter a Value or select related from the pickup list.

    v.   If you wish to add another step, click on '+'icon next to your first operator.

    vi. Follow the steps i to iv to add details for an additional criteria branch.
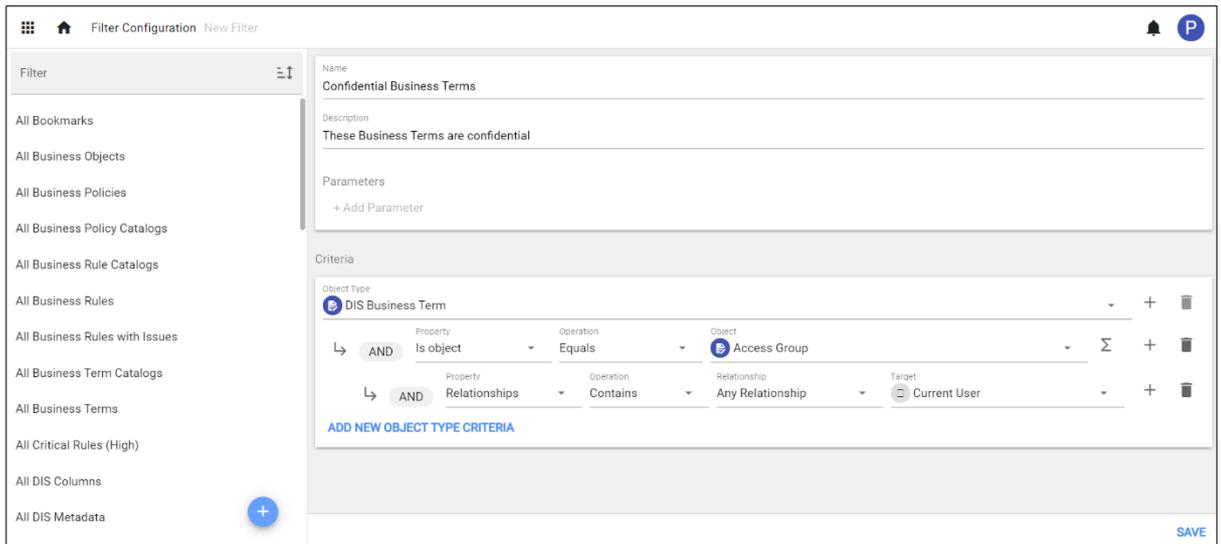
5. If you wish to enter further Object Type Criteria to filter, click on **Add New Object Type Criteria** shown in blue color below the operations.

    Repeat Steps from 4 to add new filter.

6. Once Object Type **Filters** are added, click on **Save.**

Scorecards

Scorecards are templated formula, which can be applied to the **Object Types.** It helps you manage and evaluate metrics that can be applied to objects. With many objects, creating an automated score is the best way to calculate value.

How Do I Create a New Scorecard?

1. Click on the profile, go to Scorecards.
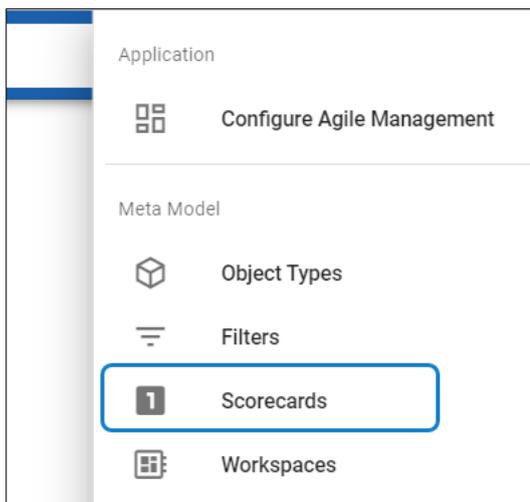
2. Click the + icon in the list view on the left-hand side of the screen, this will create a blank new **Scorecard.**
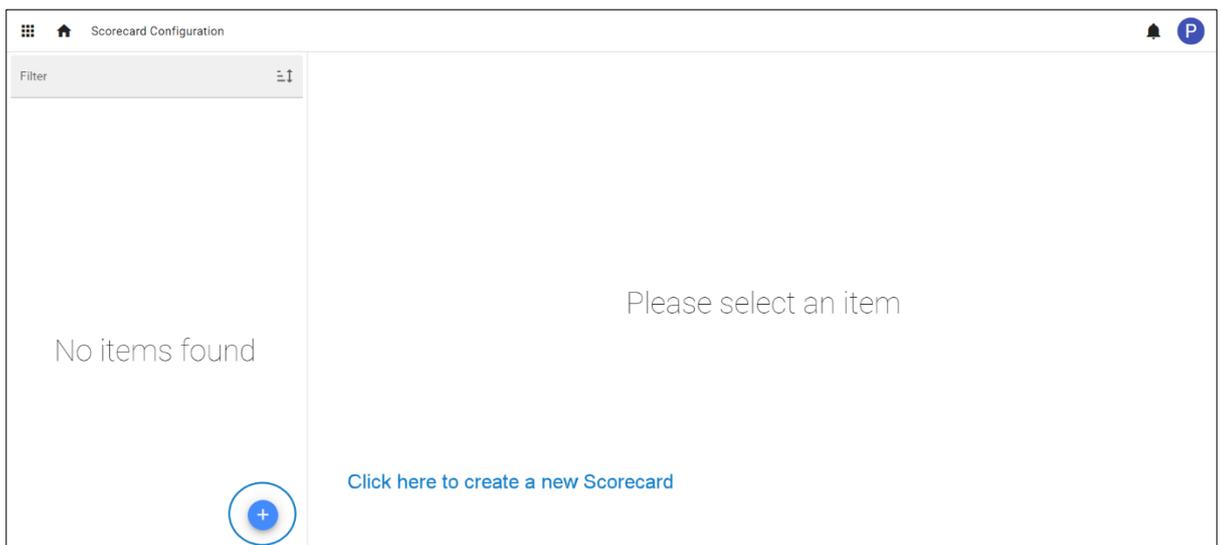
3. Enter **Name** and **Description**. Click on + icon at the bottom of the screen to **Add Values** to the formula.
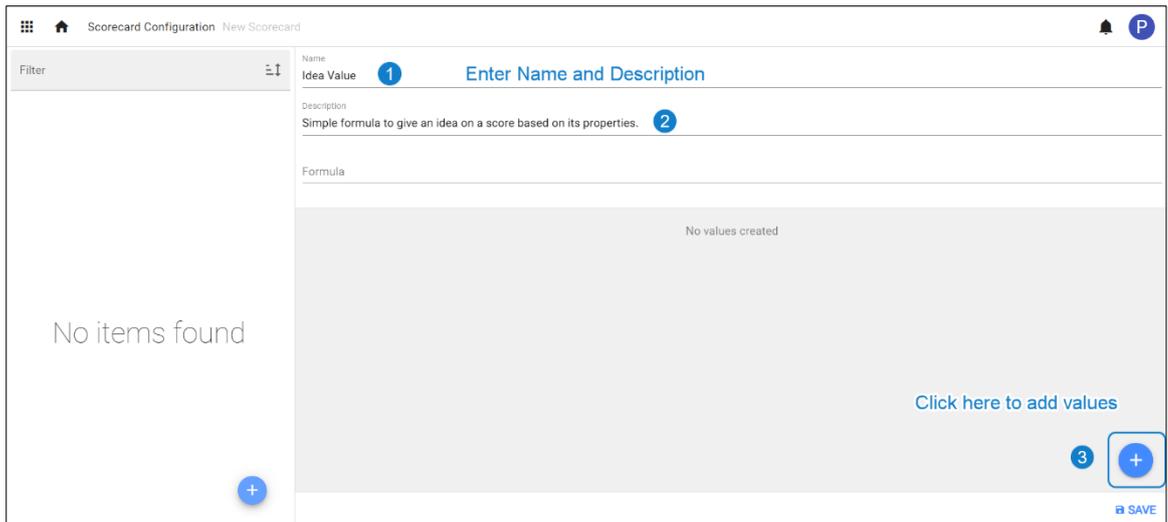
4. You need to click multiple times to add required values. Click on the expansion button against each value and then enter **Name** and **Description** for every value added.
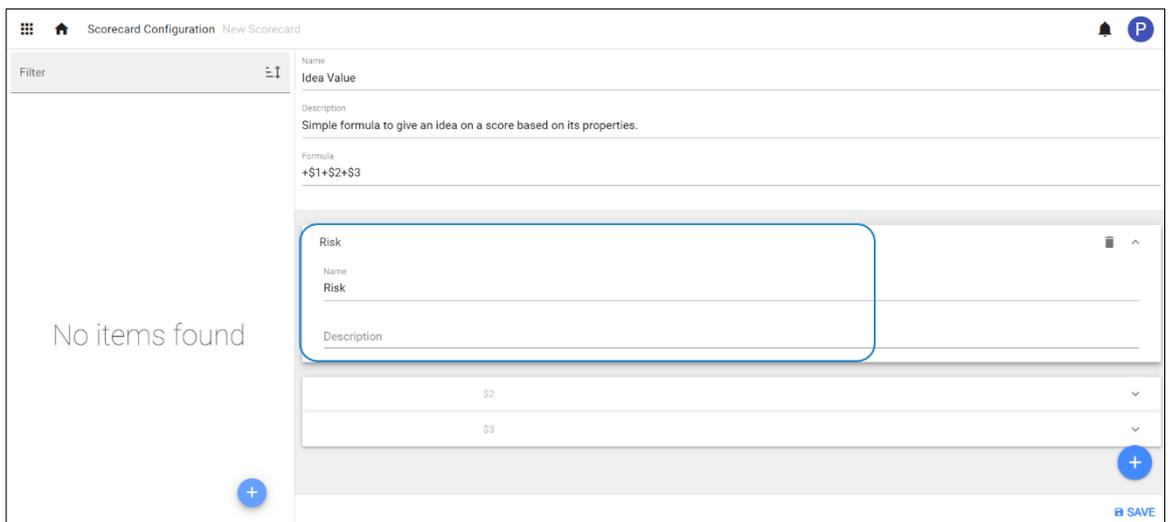
5. Edit the **Formula,** if needed. To finish creating a **Scorecard**, click on **Save** from the right bottom of the screen.
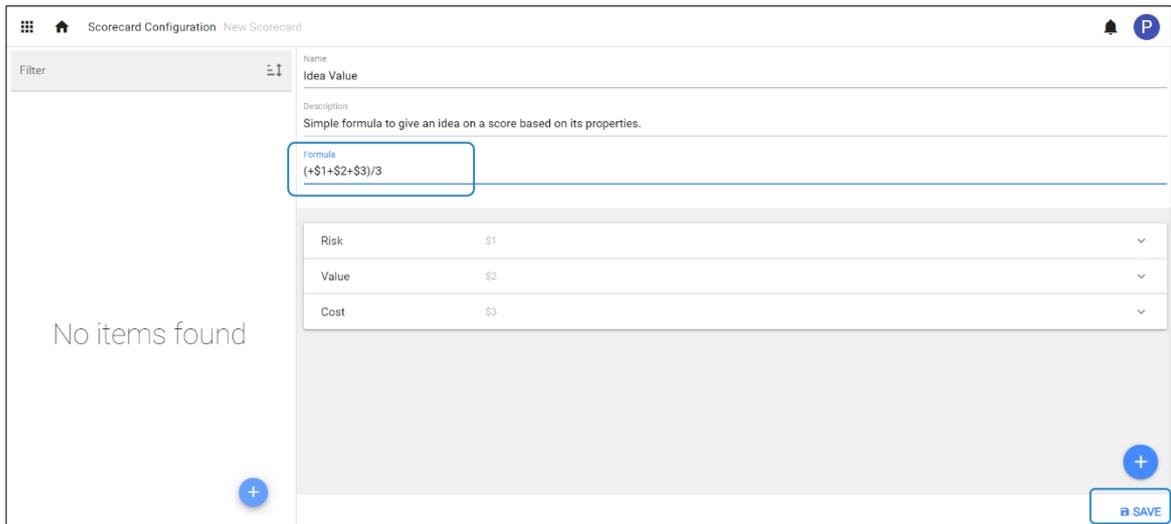
How Do I Add Scorecard to Object Type?

1. Go to profile, click on **Object Types.**

   Select the desired **Object Type** from the list you wish to add **Scorecard**.
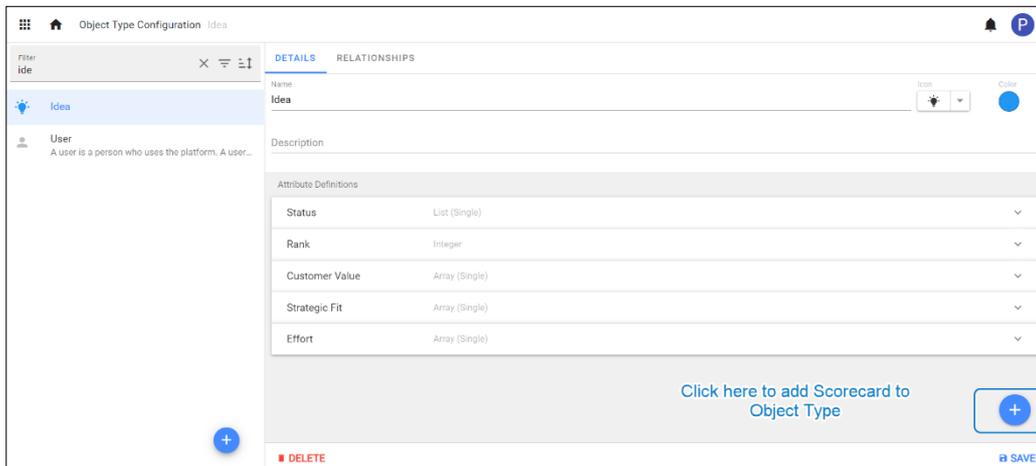
2. Click + icon from the right bottom of the screen. This will open the blank attribute defining options.

   i.   Select **Type** as **Scorecard** from the list. Enter the **Name** and **Description** (optional).

   ii.   Click on **Scorecard,** Select the **Scorecard** from the list you wish to apply.
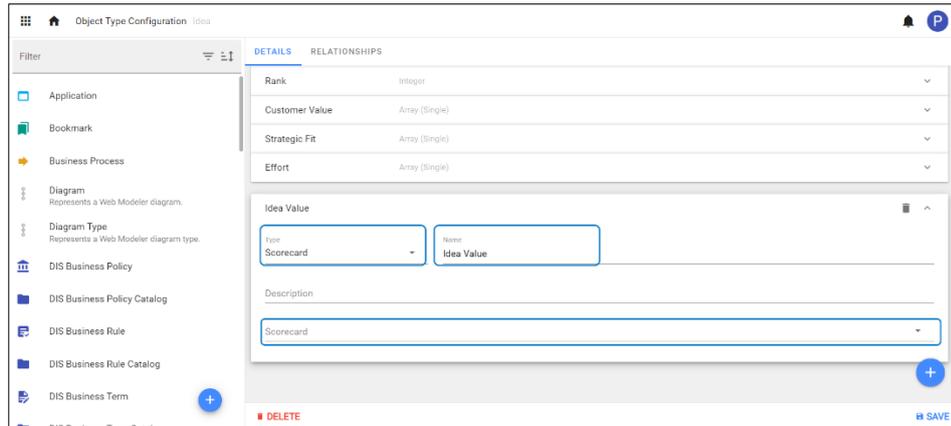
3. Select the **Attribute Definition** for each **Attribute**.
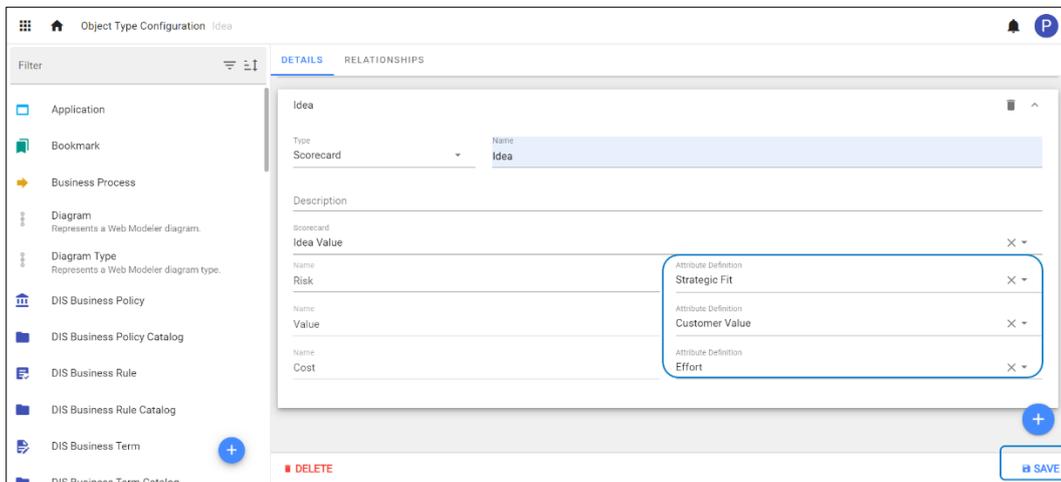
4. To finish adding **Scorecard**, click on **Save.**

Workspaces

Workspaces are supported by the Client areas. **Workspaces** can be set up by an administrator.

How Do I Add A New Workspace?

1. Click on the profile, go to **Workspaces**
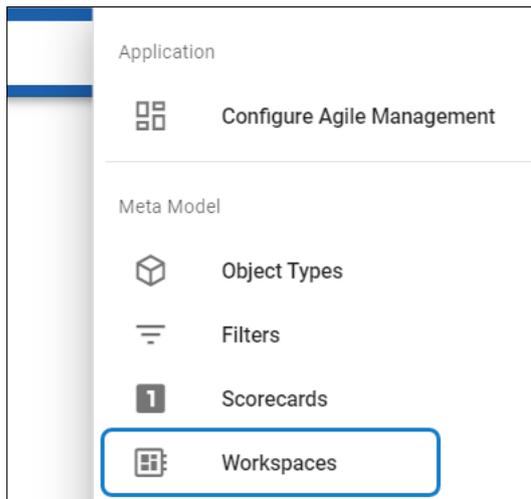
2. Click the **+** icon on the left-hand side of the screen, this will create a blank New **Workspace**.
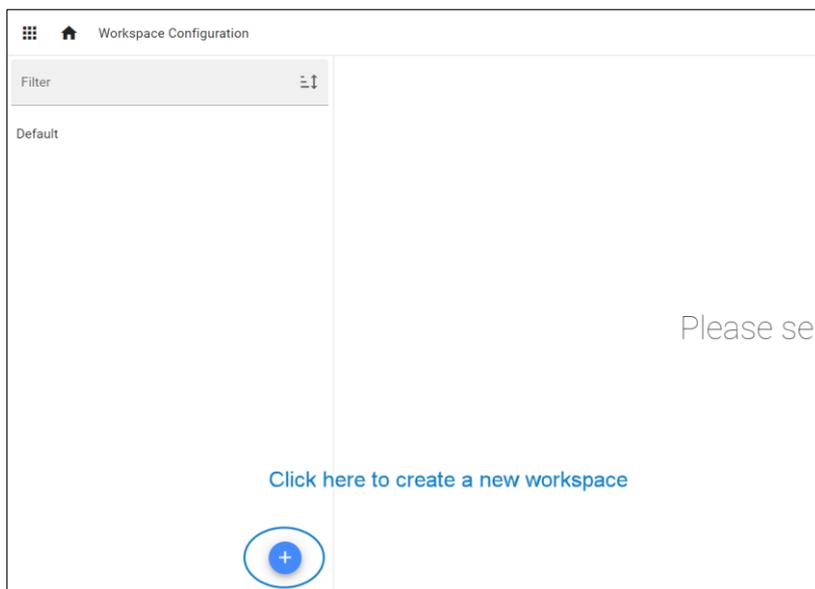
3. Enter **Name**, **Description,** and an **Icon** to your new Workspace.

   You can set the **Workspace** as **Default** and restrict a **Workspace** to a **Community**.
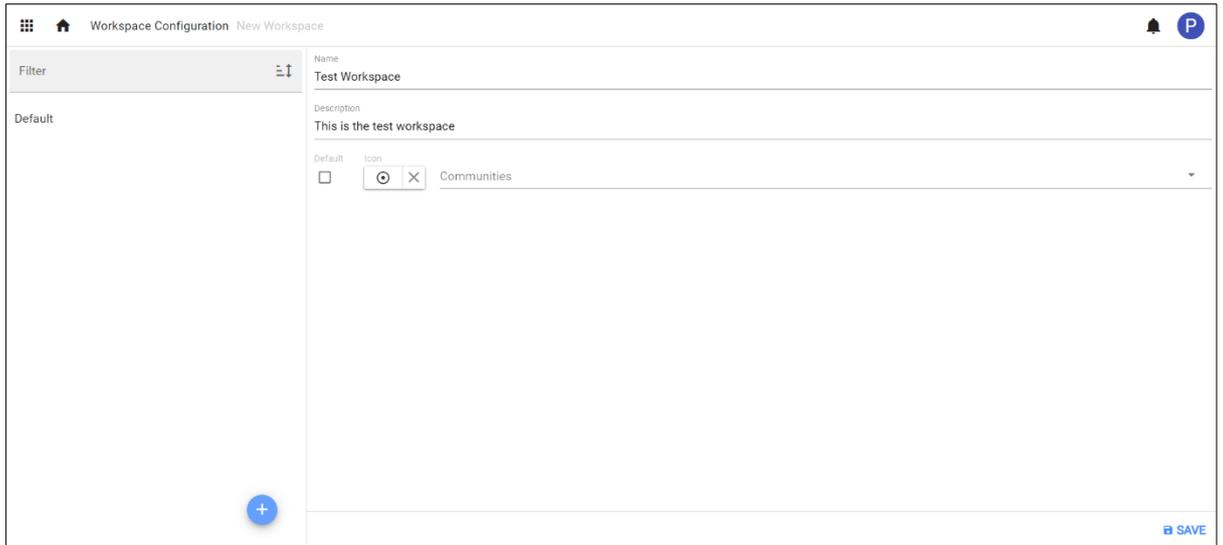
4. Click **Save.**

Layouts

Layout views in the application editor are used to plan or design the arrangement of the information. Application Layout can be customized using multiple types of layouts.

Layouts come in six different types to create a cohesive look and structure for the application.

1. Menu
2. Tabs Layout
3. Column Layout
4. Row Layout
5. Stream Layout
6. Accordion Layout
7. Carousel Layout

Menu View

Menu view in the Layout is used to create a structure with a separate set of information on the same page.

To create a **Menu View,**

1. Click on **All Views** in the application editor and then click on icon placed at the bottom of the list of views, then select **Menu**.
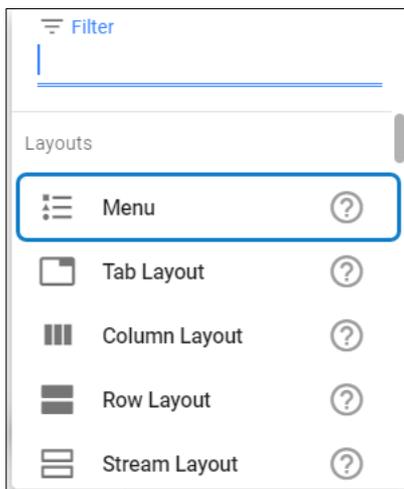
2. Click on **Add Menu Item** icon from the toolbar or click on **Configuration** to add the menu items.
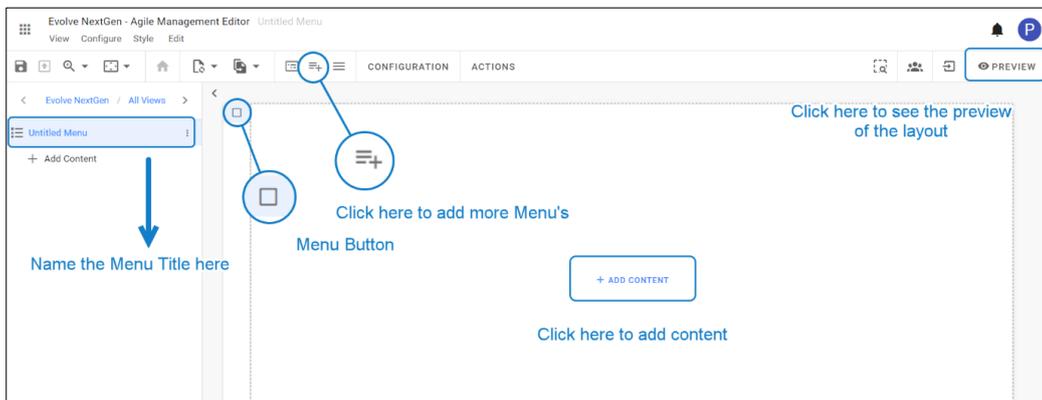
3. To **Enable Fixed Menu**, click on the icon shown in the picture below.
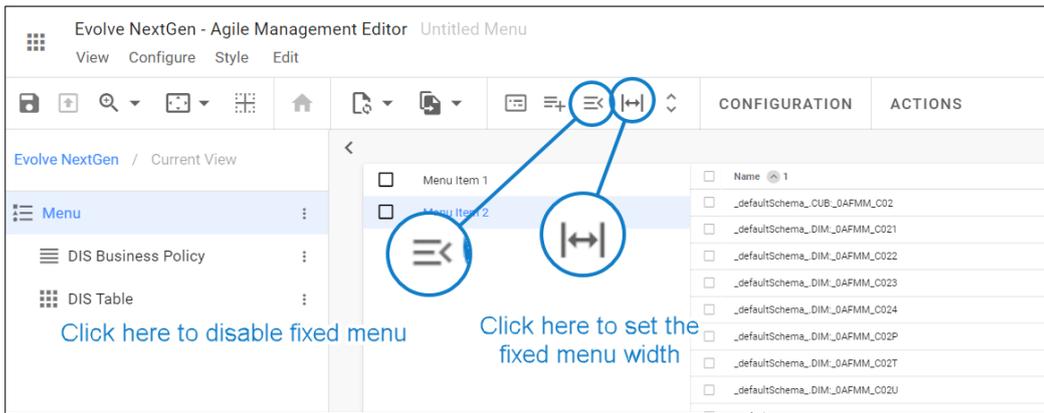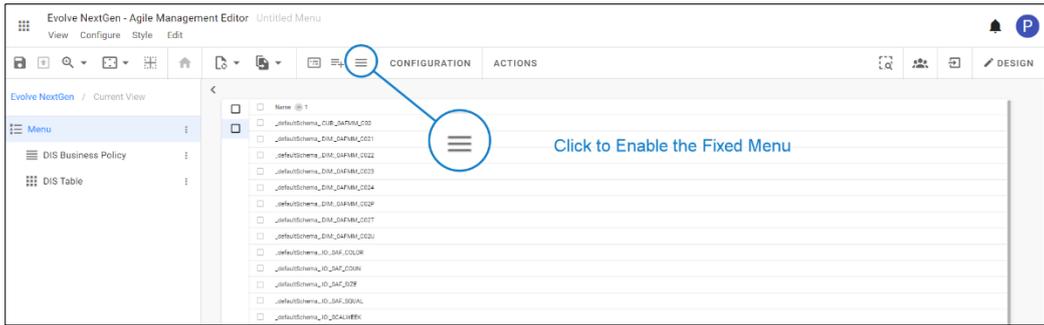
To customize the **Menu Width,** click on **Configure Fixed Menu Width** shown above.

Enter the value and then click on **Apply.**
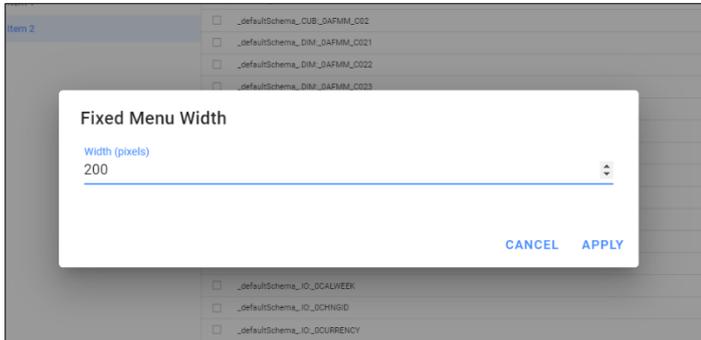
> ℹ The menu width should be greater than or equal to 200px.

4. Click on **Add Content** and select the view type you wish to configure.

   You can add any other **Layout, Collection, Charts, or Item Views** under each menu as per your use case.

   For instance, a **List View** is configured in the view shown in the picture below.
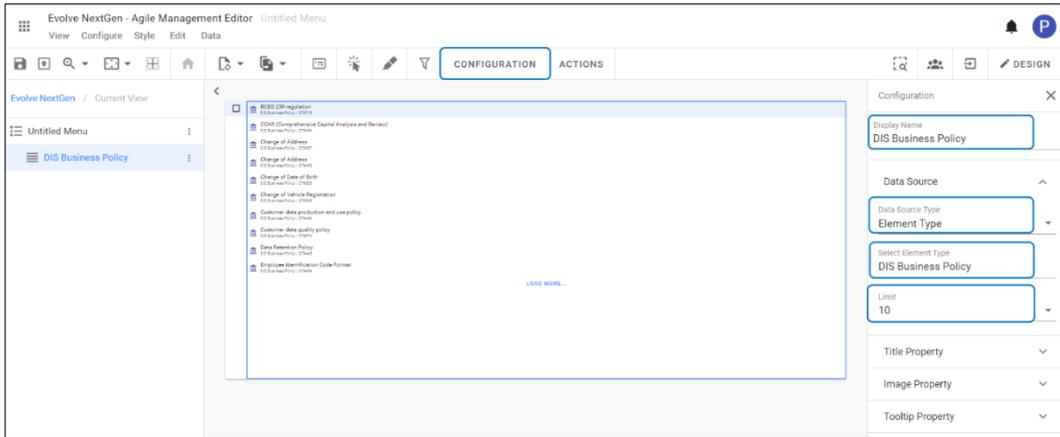
ℹ️ Go to respective view type to see how to configure.

5. To configure the displaying title property, click on Title Property under Configuration
   - To add **Icon** and **Color** for the **Menu**, click on menu title and then select the menu item from the right-side configuration panel.
   - Select **Icon** and **Color**, and then click on **Apply Changes.**
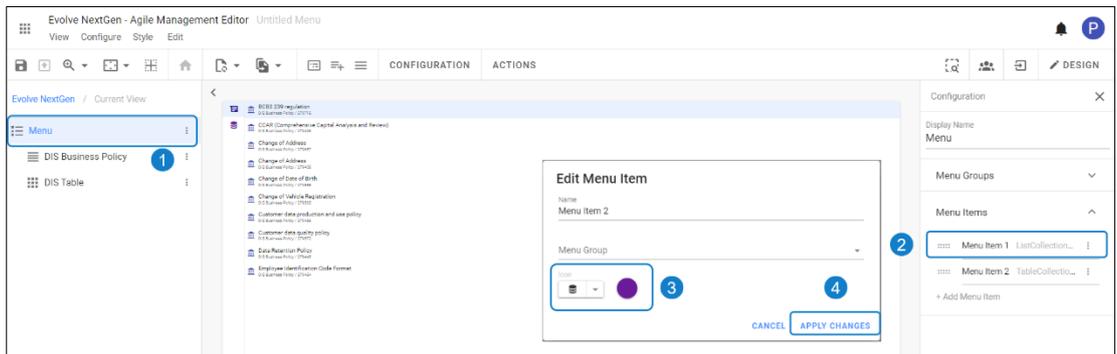
ℹ️ Setting the **Limit** is available specifically for selected views.

6. Multiple Menus will be displayed as shown in the picture below:
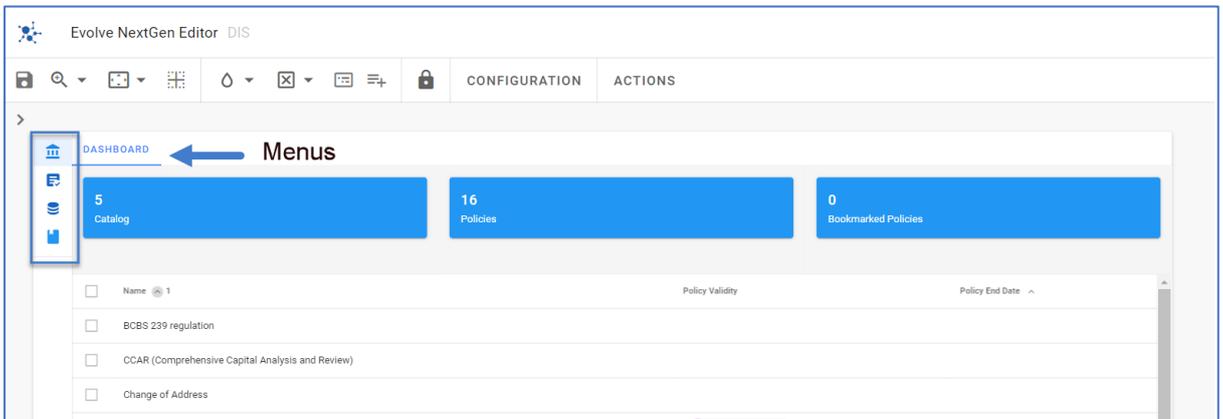
ℹ Each Menu Item must be configured individually to see the result.

How to work with Menu Groups?

A multiple individual **Menu Items** can be assigned and grouped together under a **Menu Group.**

To create a Menu Group and assign items,

1. Go to **Configuration** on toolbar, then click on **Menu Groups** from the left-hand side.
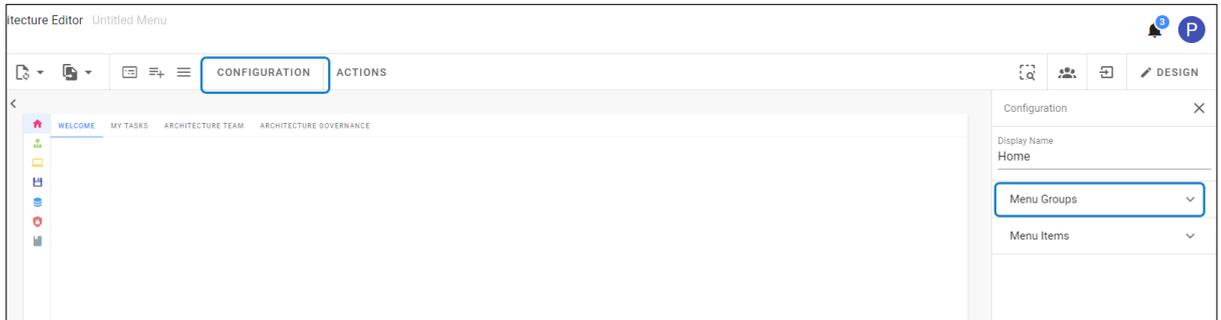
2. Click on +**Add Menu Group** > **select the created group** to edit.
   Enter **Name** > Select **Parent Group** (Optional) > Select **Icon and Color** > **Apply Changes**.
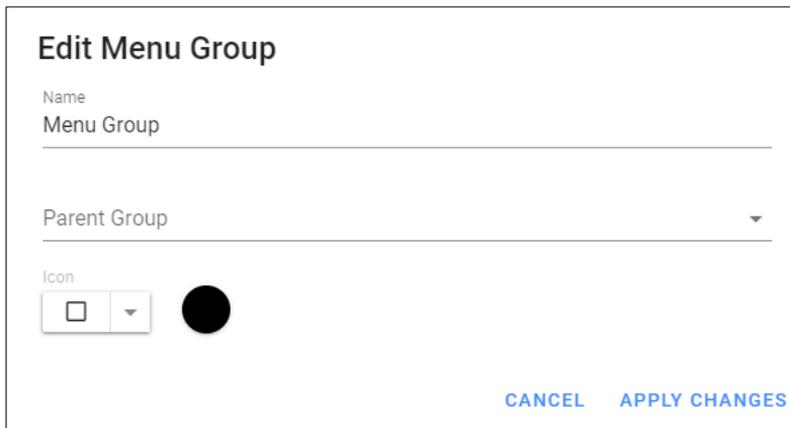
ℹ Selecting a **Parent Group** is adding a **Menu Group** inside another **Menu Group**.

3. To assign the **Items** to the **Group**,
   Go to **Menu Items** > click on +**Add Menu Item** > Enter **Name** > Select the **Menu Group** > Select **Icon and Color** > **Apply Changes.**

4. Multiple **Menu Items** under a **Menu Group** will look as shown in the picture below.
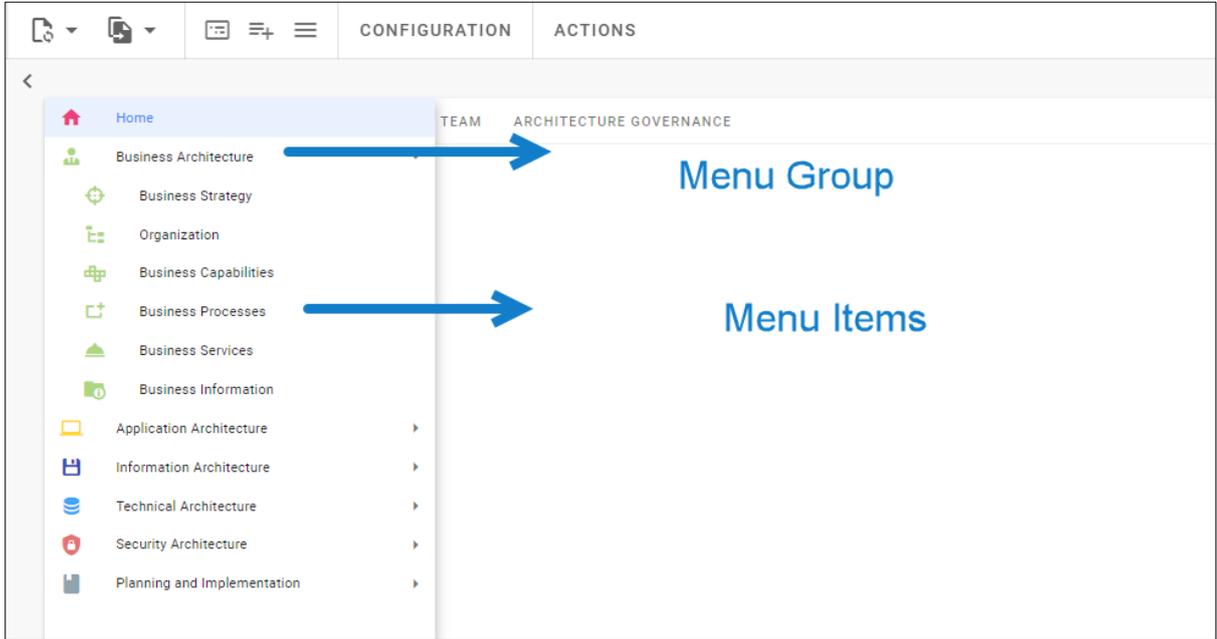
Tabs

Tabs View helps to organize the content in a separate section on a page.

To create **Tabs,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views and then select **Tab Layout**
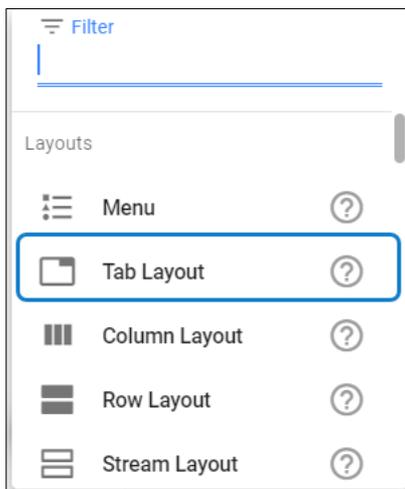
2. Click on **Add Content** to feed the view in each Tab.
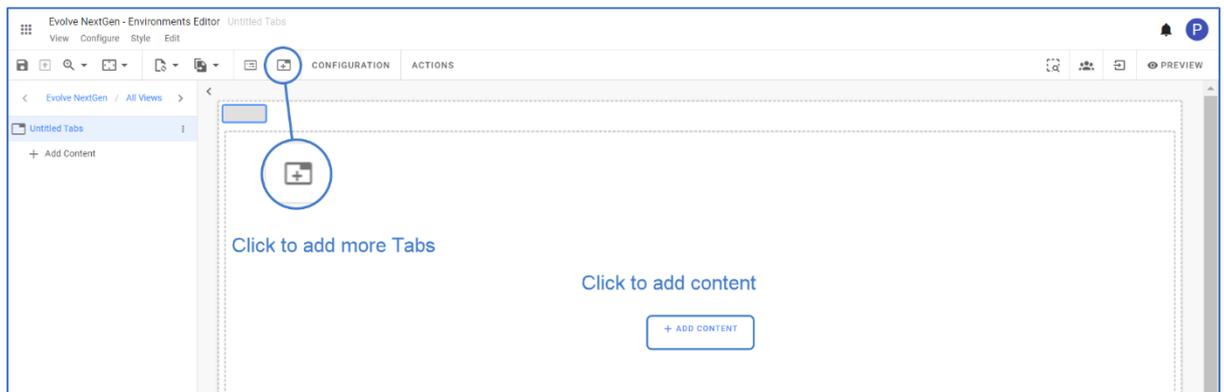
- To edit the Tabs, click on **Configuration**
- Enter **Display Name** for the Layout.
- Click on **Tabs**, which you wish to edit.
- Enter the **Tab Name** and click on **Apply Changes**.
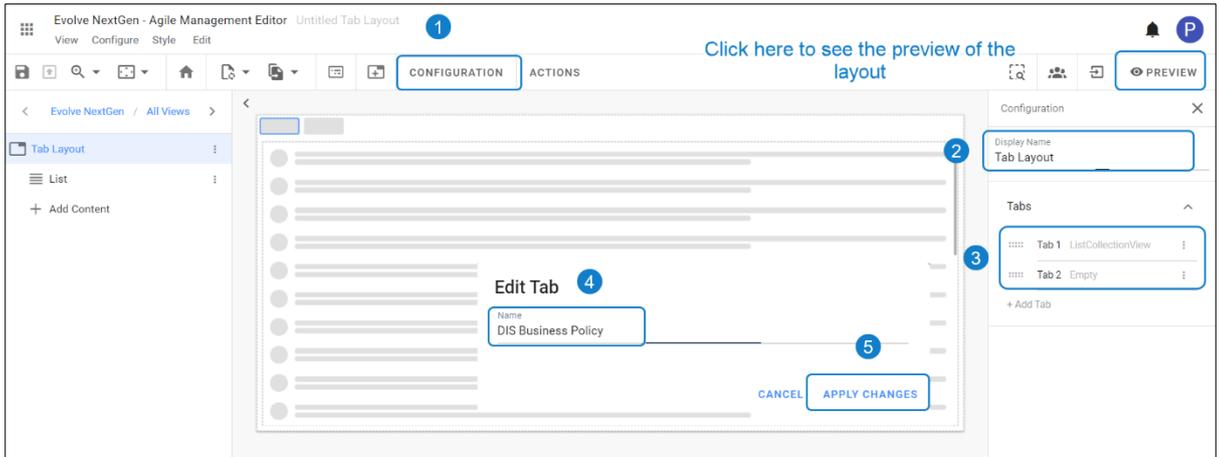
3. To configure the view tab, select the tab and then click on **Configuration** on the toolbar or right-click on the view.

   You can add any other **Layout, Collection, Charts, or Item Views** under each tab as per your use case.

   For instance, a **List View** is configured in the view shown in the picture below.
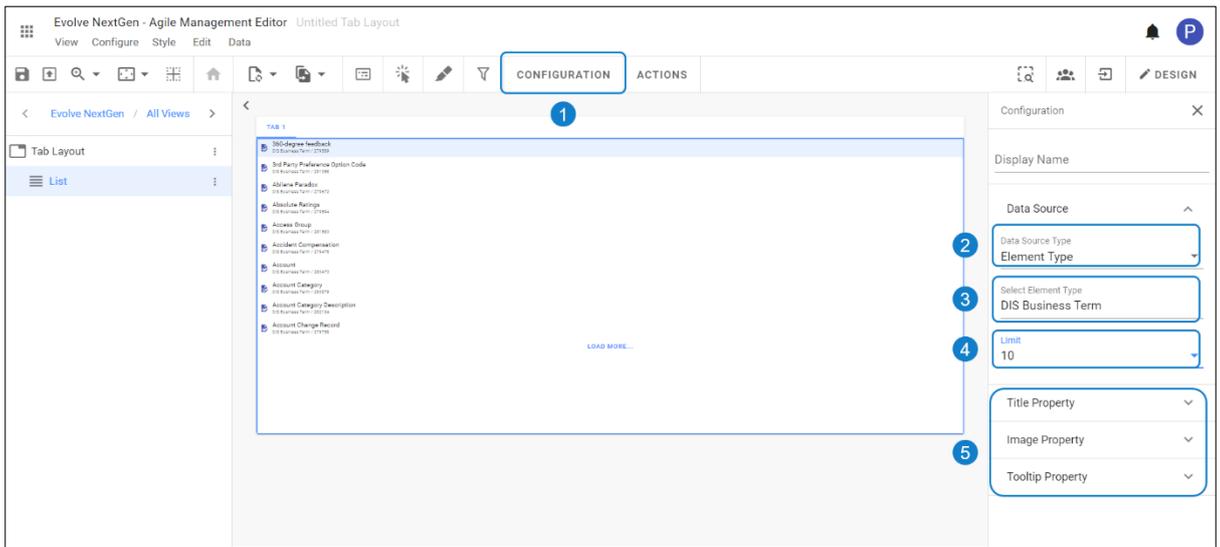
4. To name the **Tab**, click on the main title. A list of tabs displays under Configuration on the right side of the screen.
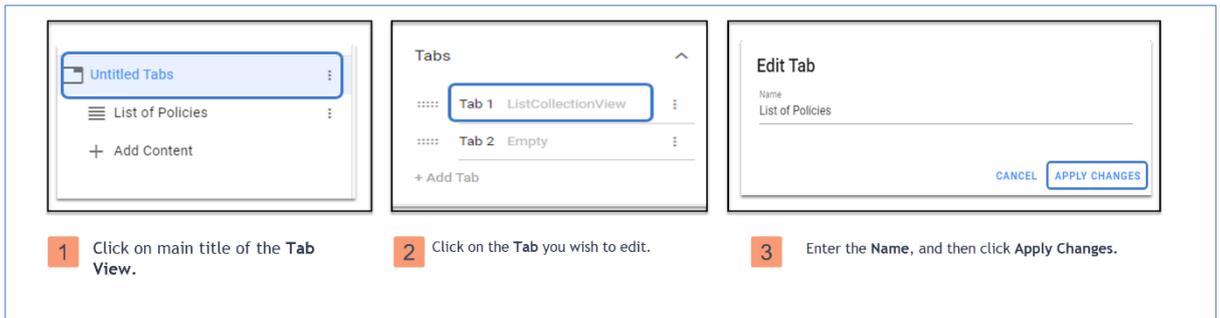
Column Layout

Column Layout helps create a modern dashboard with customizable columns size and positions in the editor.

To create a **Column Layout,**

1. Click **All Views** in the editor, then click on [+] icon placed at the bottom of the list of views. Select **Column Layout** from the list.
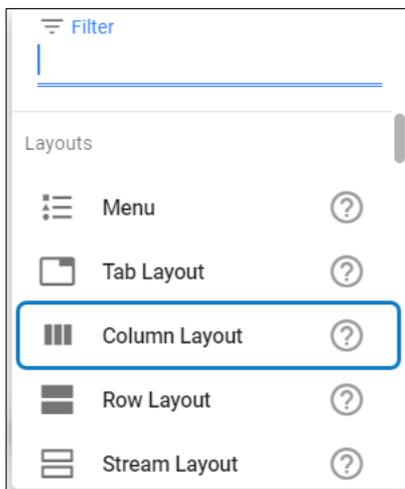
2. A layout with two columns by default will be opened in the editor, as shown in the picture below.
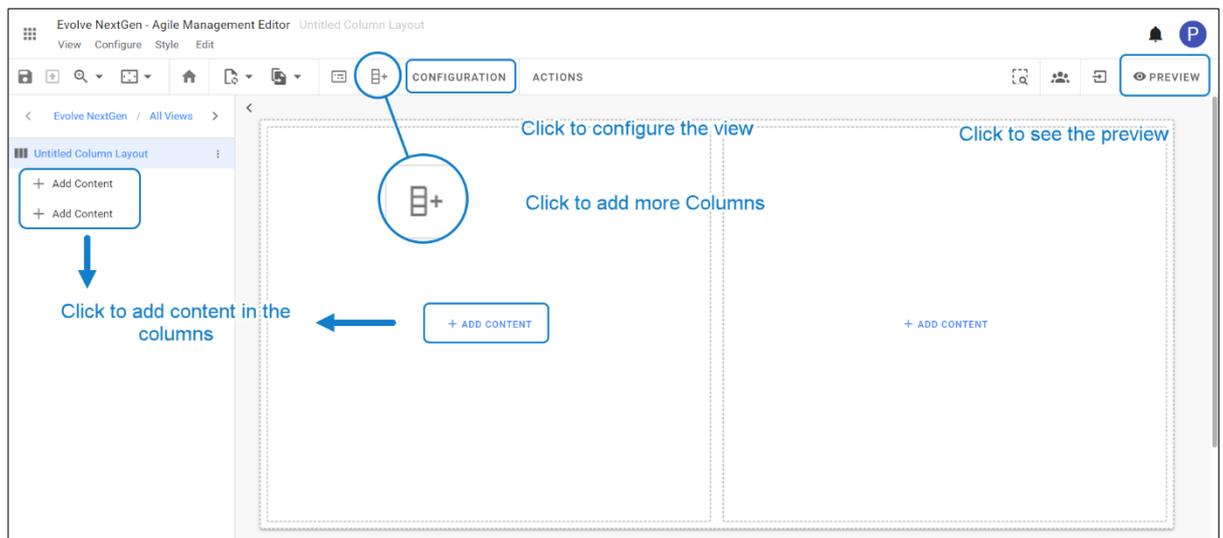
> **i** To add more columns, click on **Add Column** icon [⊟+] from the toolbar. Or click on **Edit**, select [⊟+ Add Column] from the list

ℹ The size of each **Column** can be adjusted by dragging the lines between the **Columns.**

3. After adding content in the columns, select the **Column** and click **Configuration** on the toolbar or right-click on the view. You can add any **Collection, Charts, Item** views as per your use case.
For instance, a **Table View** and a **List View** added in the columns. You must configure each column individually.
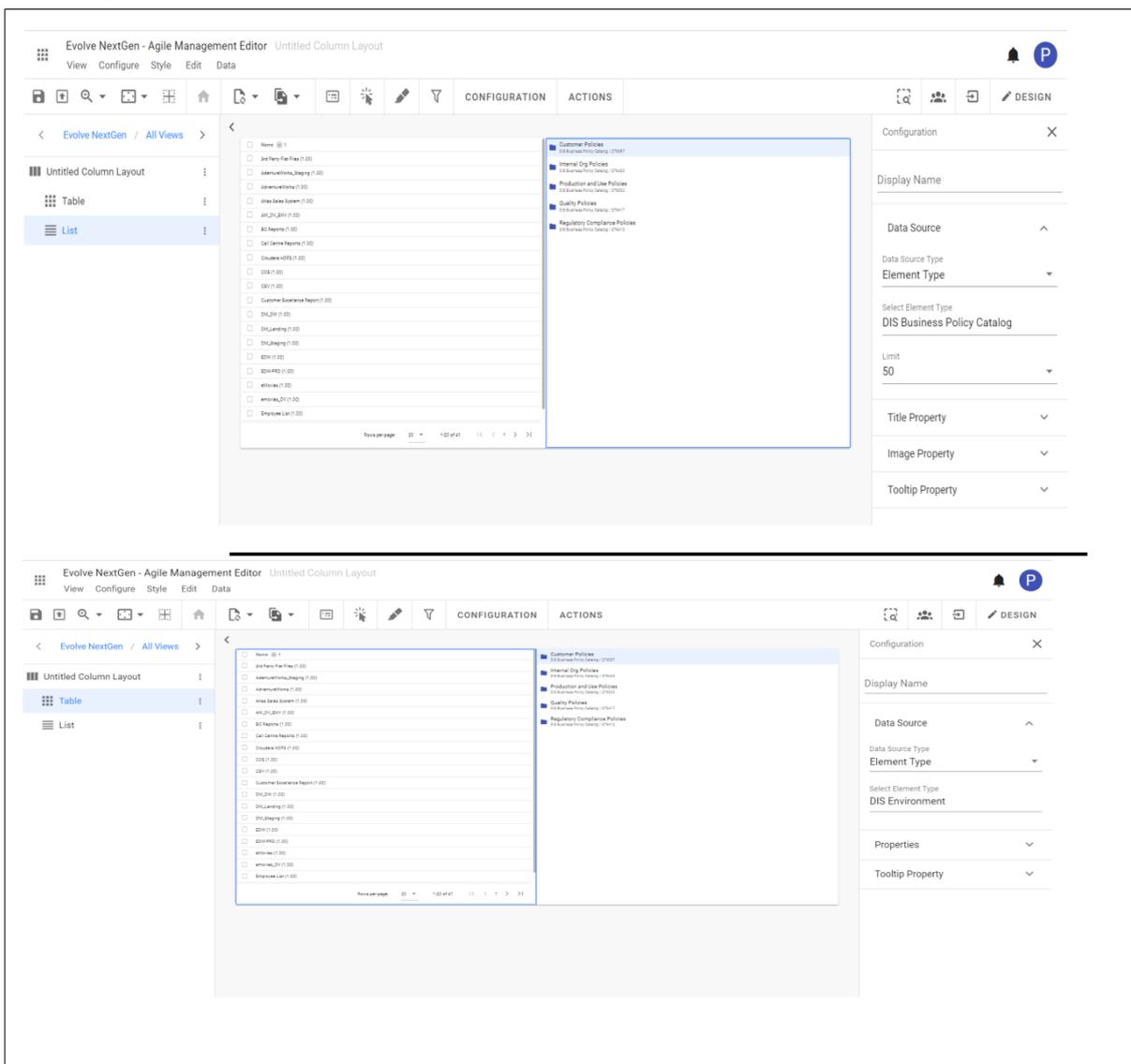
Row Layout

Row Layout helps create a modern dashboard with customizable rows size and position in the editor.

To create a **Row Layout,**

1. Click **All Views** in the editor, then click on ![+] icon placed at the bottom of the list of views.
2. Select **Row Layout** from the list.
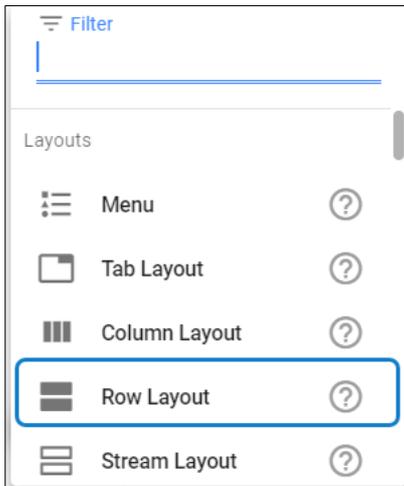
3. Click on **Add Content** > **Add New View** > **Select the view type** you wish to add.
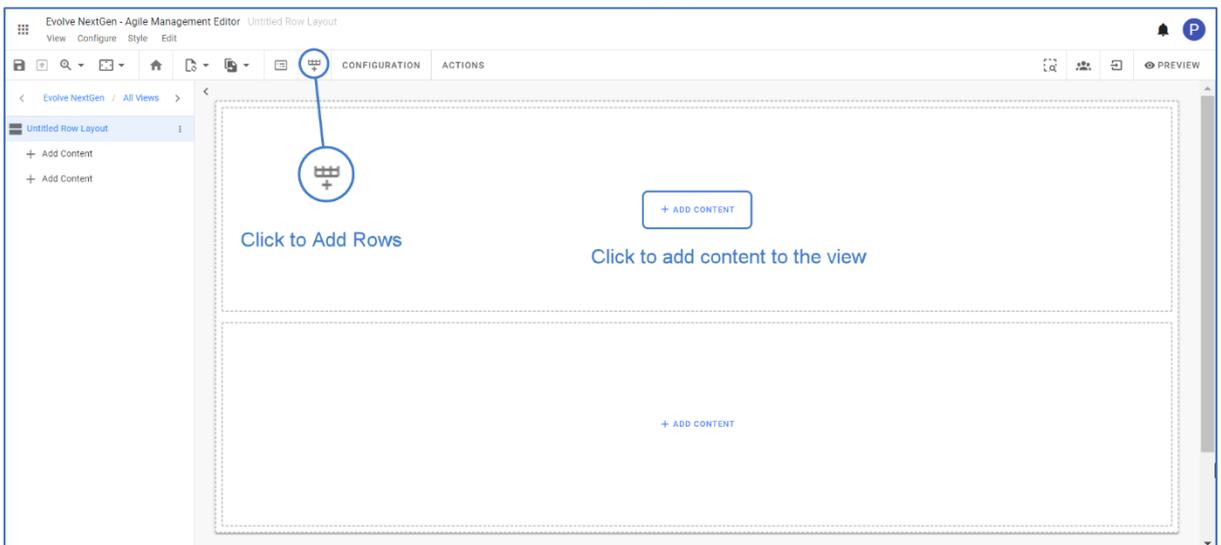
4. After adding content in the Rows, select the **Row** and click **Configuration** on the toolbar or right-click on the view. You can add any **Collection, Charts, Item** views as per your use case.
   For instance, a **List View** is added in the first row as shown in the picture below. You must configure each row individually.
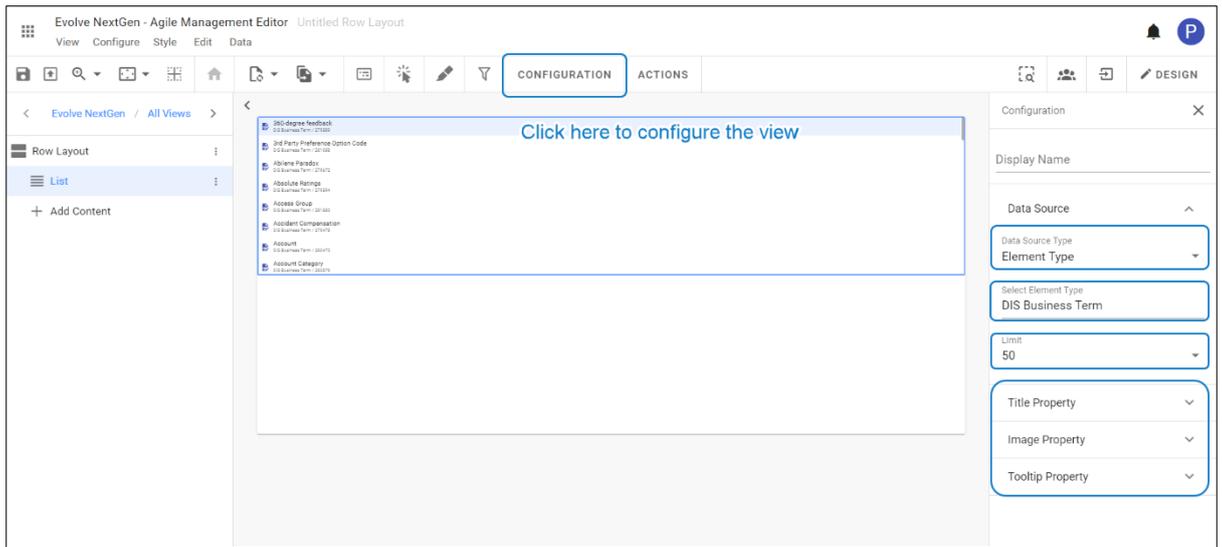
ℹ️ The size of each **Row** can be adjusted by dragging the lines between the **Rows**.

Each **Row** must be configured similarly explained above.

Stream Layout

Stream Layout is used to create the mixed content in the rows which can be scrolled.

To create a **Stream Layout,**

1. Click on **All Views** in the editor and then click on ⊕ icon placed at the bottom of the list of views.
2. Select **Stream Layout** from the list.
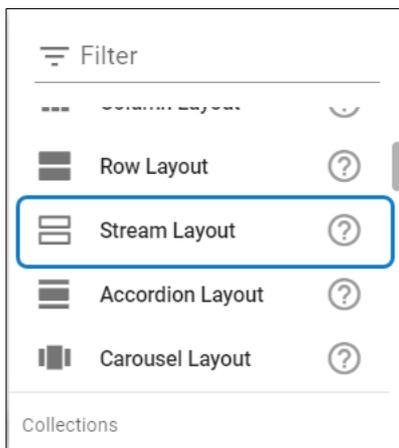
3. A layout with two rows by default will be opened in the editor as shown in the picture below.

   Click the icon ≡₊ to add **Stream Items**.
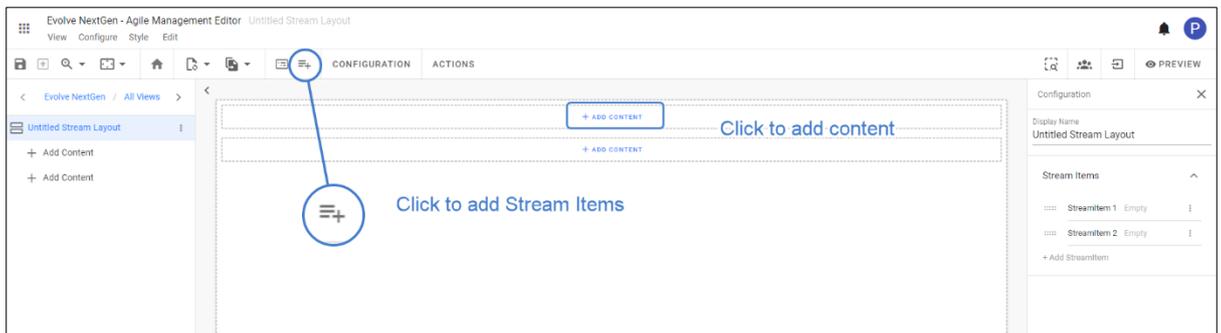
4. Click on **Add Content** > **Add New View** > **Select the view type** you wish to add. Repeat the same step for other items too.
5. After adding content in the layout, select the **Stream** and click **Configuration** on the toolbar or right-click on the view. You can add any **Collection, Charts, Item** views as per your use case.
   For instance, a **Table** and **List View** is configured as shown in the picture below. You must configure each stream individually.
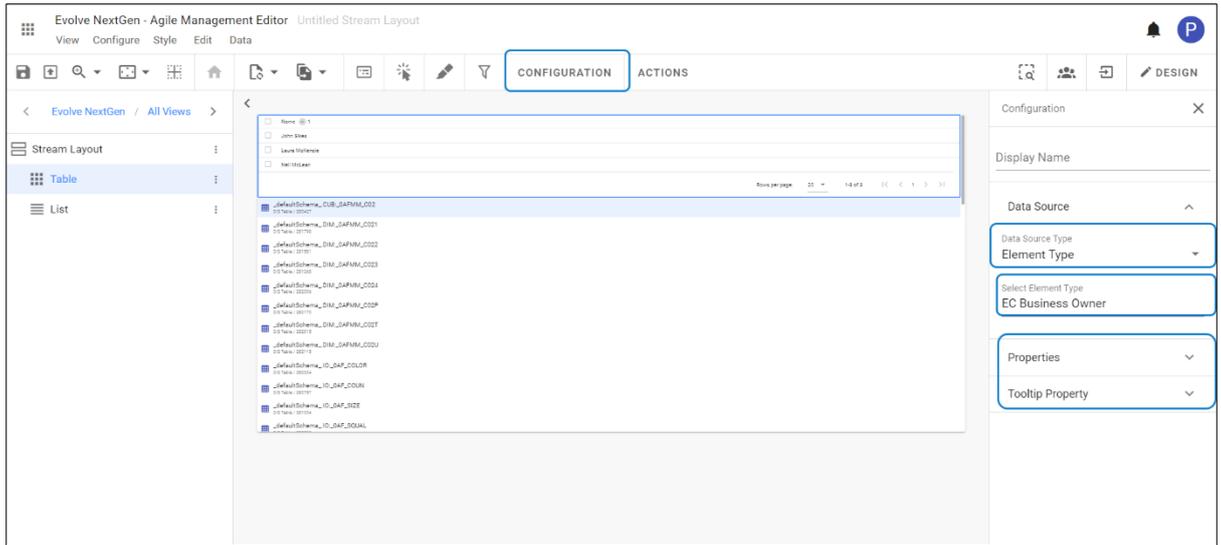
Accordion Layout

Accordion Layout helps to categorize a form or to create a flow to the information.

Each accordion is used to toggle between hiding and showing the content.

To create **Accordion Layout,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Accordion Layout** from the list.
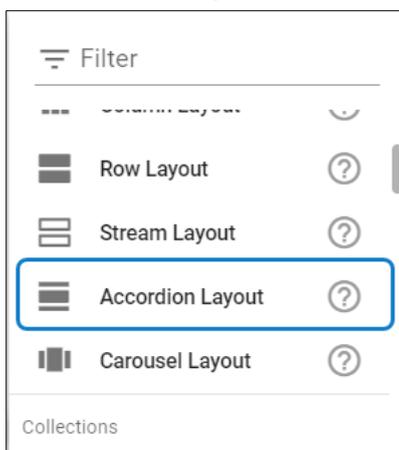
3. A default layout will be opened in the editor as shown in the picture below.

   Click the icon to add **Accordion Items**.
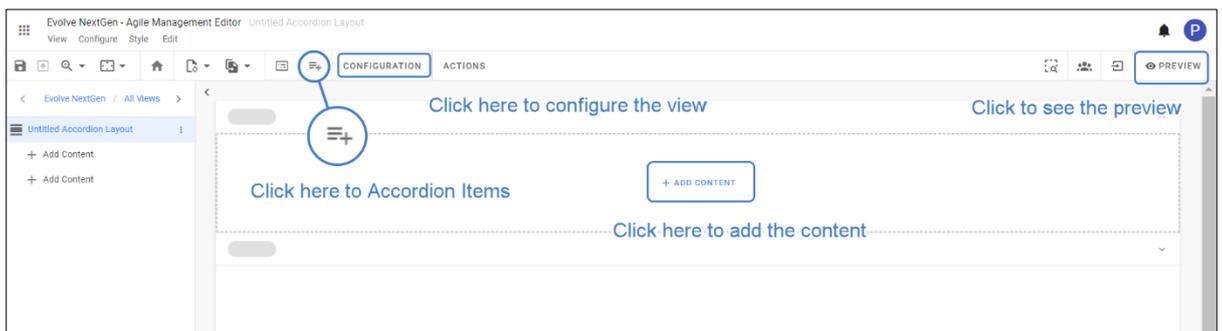
4. Click on **Add Content** > **Add New View** > **Select the view type** you wish to add. Repeat the same step for other items too.
5. After adding content in the layout, select the **Accordion** and click **Configuration** on the toolbar or right-click on the view. You can add any **Collection, Charts, Item** views as per your use case.
   For instance, a **Table** and **List View** is configured as shown in the picture below.
   You must configure each accordion individually.
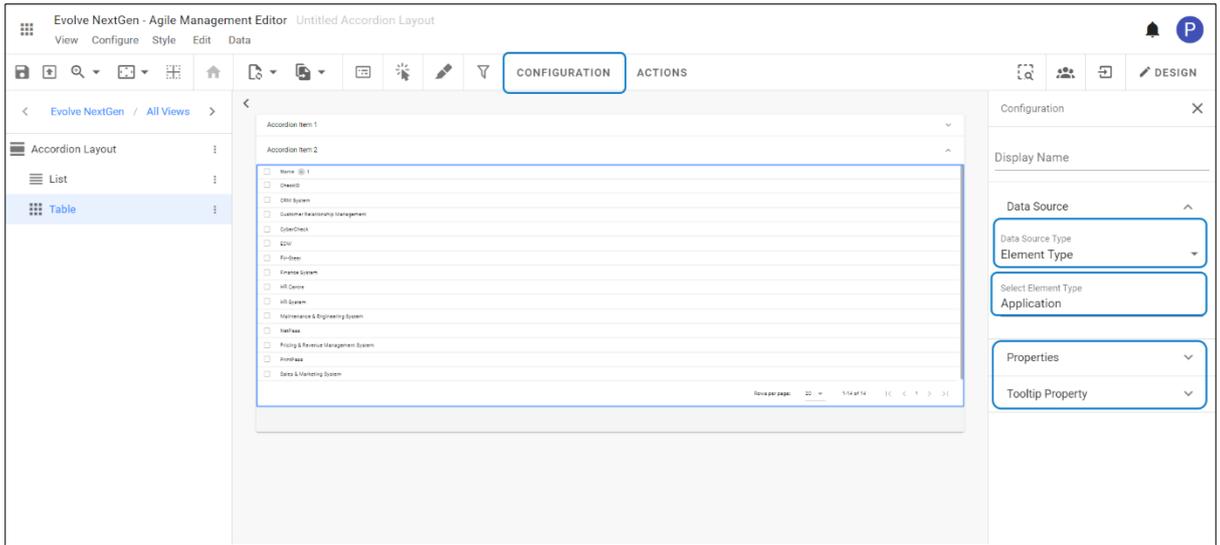
6. To edit the **Accordion** titles,

   - Select the **Layout** title, and then click on **Configuration**.
   - Click on **Accordion** you wish to edit.
   - Enter **Name** and click on **Apply Changes**.
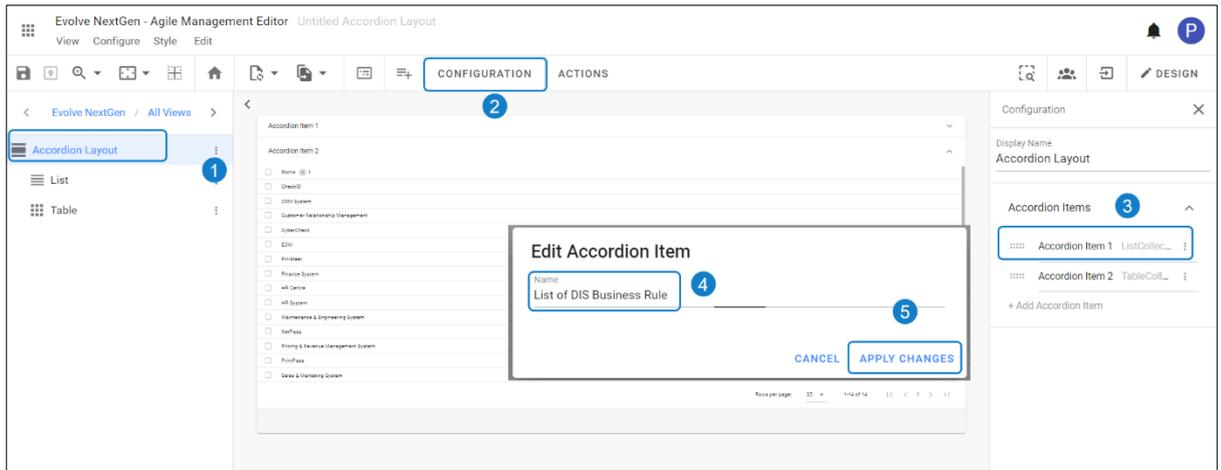
i Repeat Step -6 to edit all the accordions you add in the layout.

Carousel Layout

Carousel Layout helps to create a cohesive look and structure for your application

Carousel can be used to cycle through multiple pieces of content in single space.

To create **Carousel Layout,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Carousel Layout** from the list.
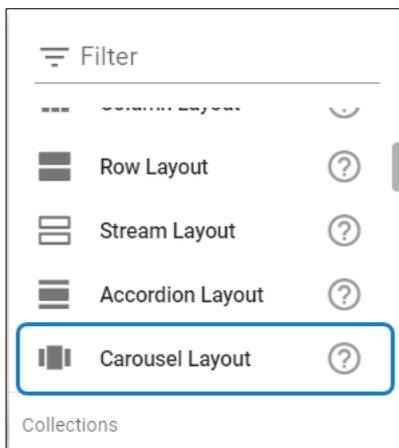
3. An unconfigured Carousel Layout will be opened in the editor as shown in the picture below.

   Click the icon to add **Carousel Items**.
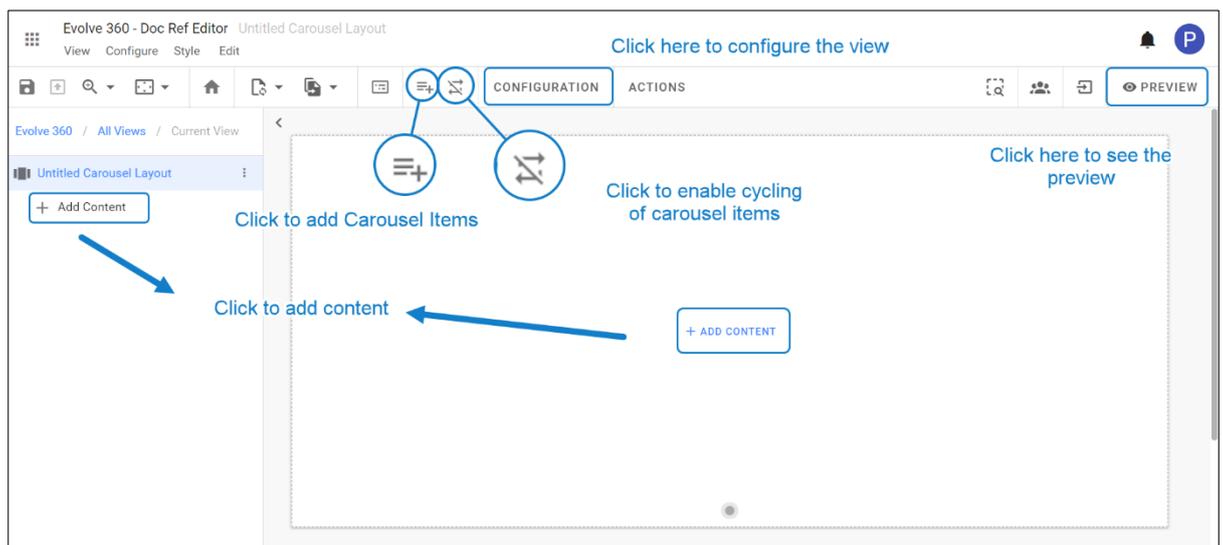
4. Click on **Add Content** > **Add New View** > **Select the view type** you wish to add. Repeat the same step for other items too.

5. After adding content in the layout, select the **Carousel** and click **Configuration** on the toolbar or right-click on the view. You can add any **Collection, Charts, Item** views as per your use case.
You must configure each carousel item individually.
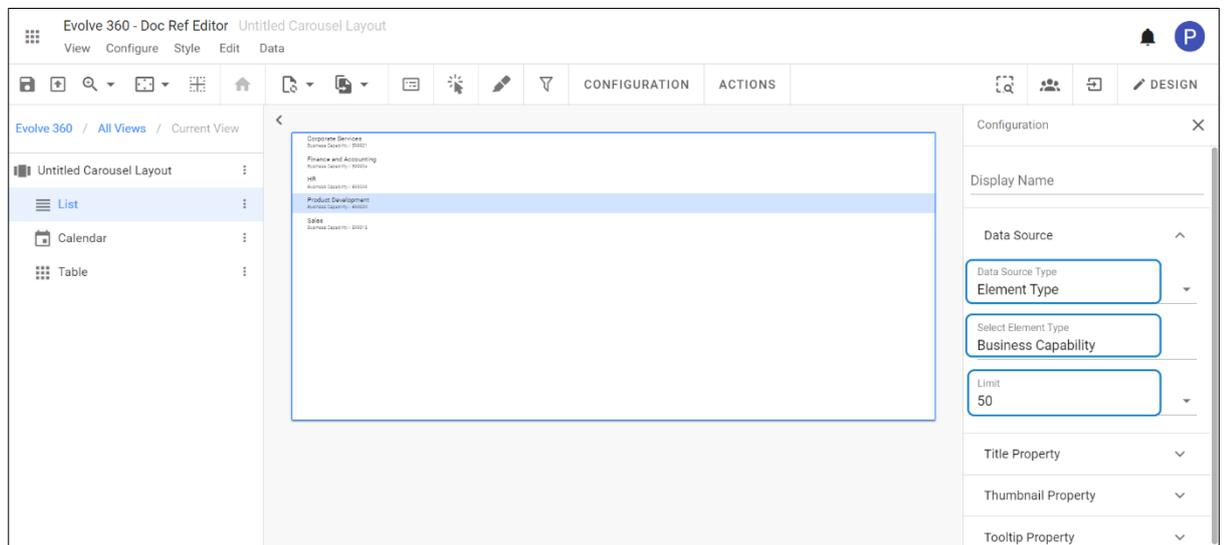
6. To enable cycling interval for carousel items, click on the toolbar or go to **Configure** and then select **Enable Cycling.**
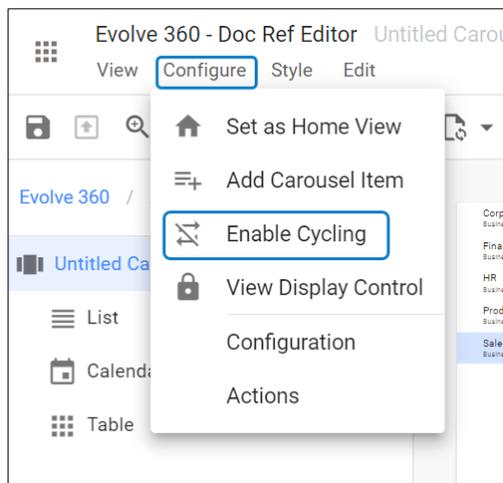
To set the **Cycle Duration,** click on the clock symbol on the toolbar.
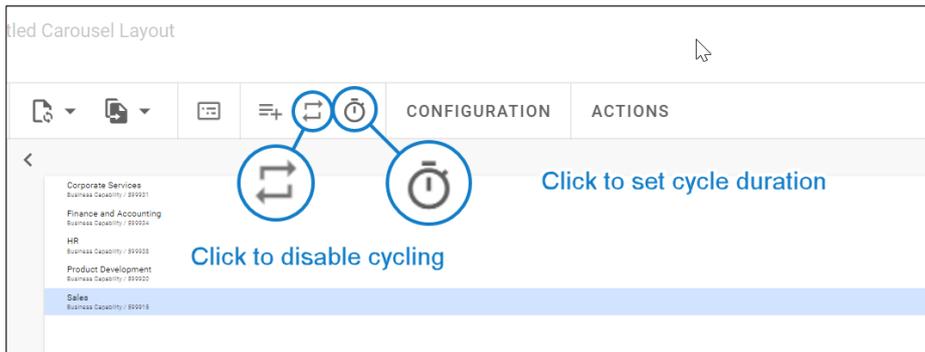
- Enter **Duration** in seconds
- Click on **Apply**.

ℹ Items in the **Carousel Layouts** can be any view type. To see the configuration of the selected item, visit that individual view type.

Collections

Collection Views are data-driven views that allow you to see, navigate and interact with the model.

Collection views are:

1. Table
2. Kanban
3. List
4. Accordion Collection
5. Carousel Collection
6. Tab Collection
7. Card Collection
8. Diagram View
9. Network View
10. Tree View
11. Roadmap
12. Calendar

Among these, four views are considered as **Special Views**, i.e., **Accordion Collection, Carousel Collection, Tab Collection** and **Card Collection.**

Table

Table is used to show the data at once in the large cross-section with vertical scrolling.

To create **Table View,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Table** from the list.
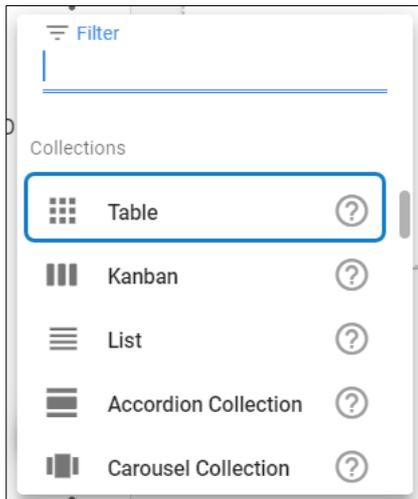
3. To configure the view,

   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Apply the **Properties, Thumbnail Property and Tooltip Property** according to the view.
   - Click **Preview** to see the result.
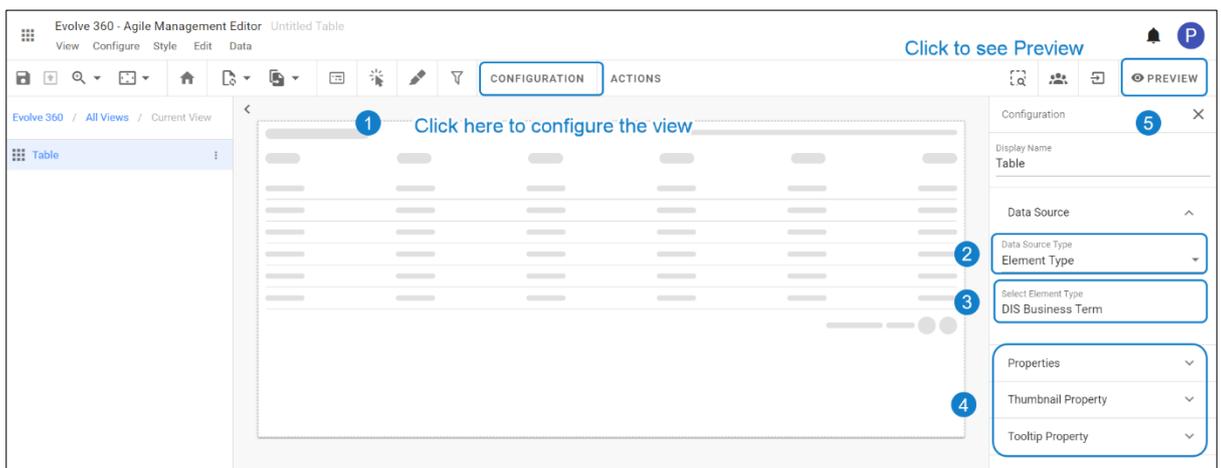
4. An example of a **Table View** displaying with two properties **Name** and **Definition** is shown below.

Kanban

Kanban view helps to create and interact with data grouped by an attribute.

To create **Kanban,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Kanban** from the list.
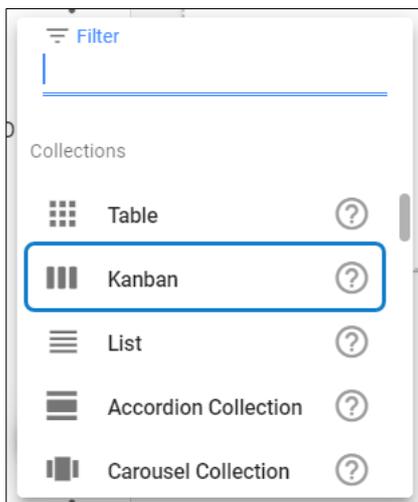
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Set **Limit** of items to display.
   - Apply the **Grouping Property, Properties** of elements, **and the available Properties** as required.
   - Click **Preview** to see the result.
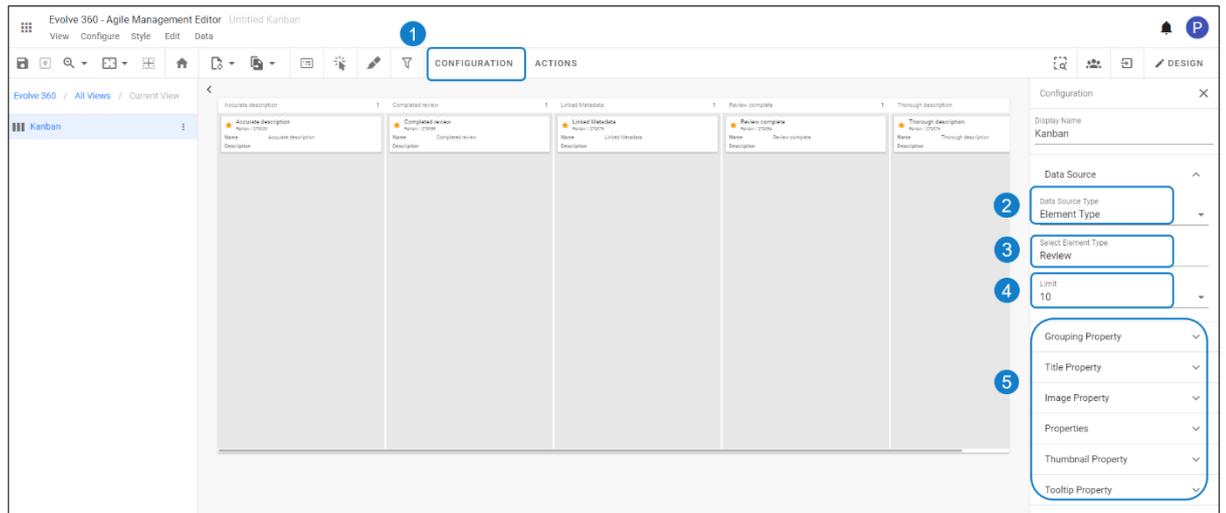
4. By default, a **Property** is set with **Name**. To add the other one, click on **Add Property** from the right-side pane.

    Select Element Type > **Select Property.**

    Enable checkbox if you wish to have the property editable.

    Click on **Apply Changes.**

5. The preview of configured **Kanban View** is shown in the picture below.
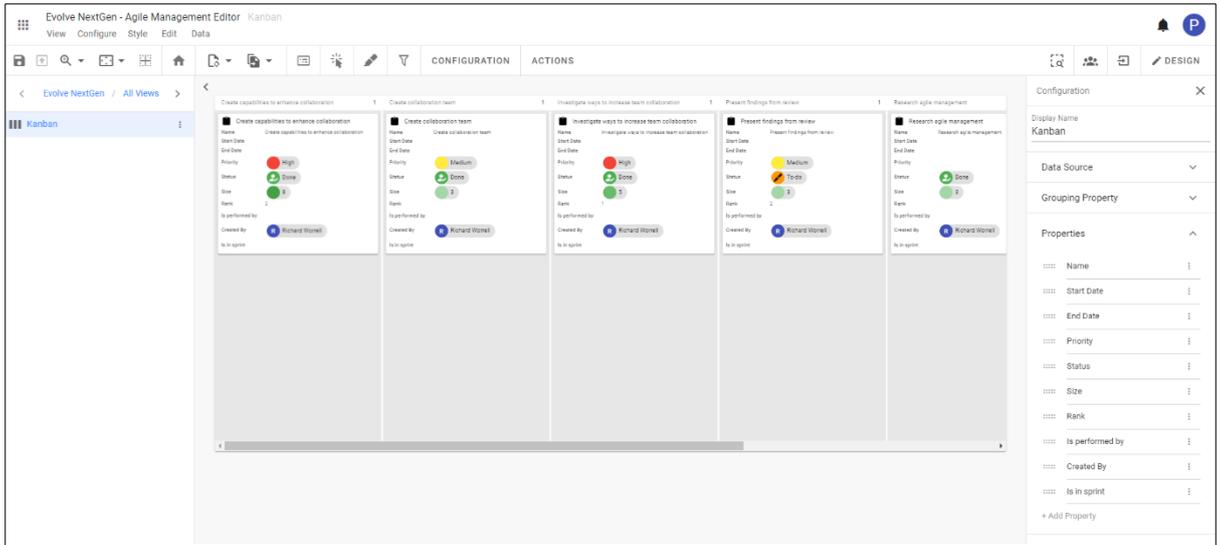
List

List view help to navigate to the data which is looking for. It displays the objects within the model and can be customized.

To create **List View,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **List** from the list.
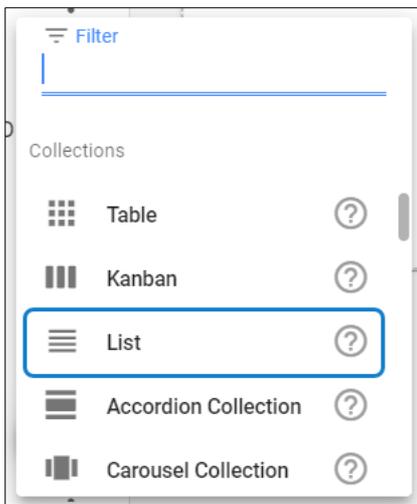
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Apply the **Title Properties, Thumbnail Property and Tooltip Property** as required.
   - Click **Preview** to see the result.
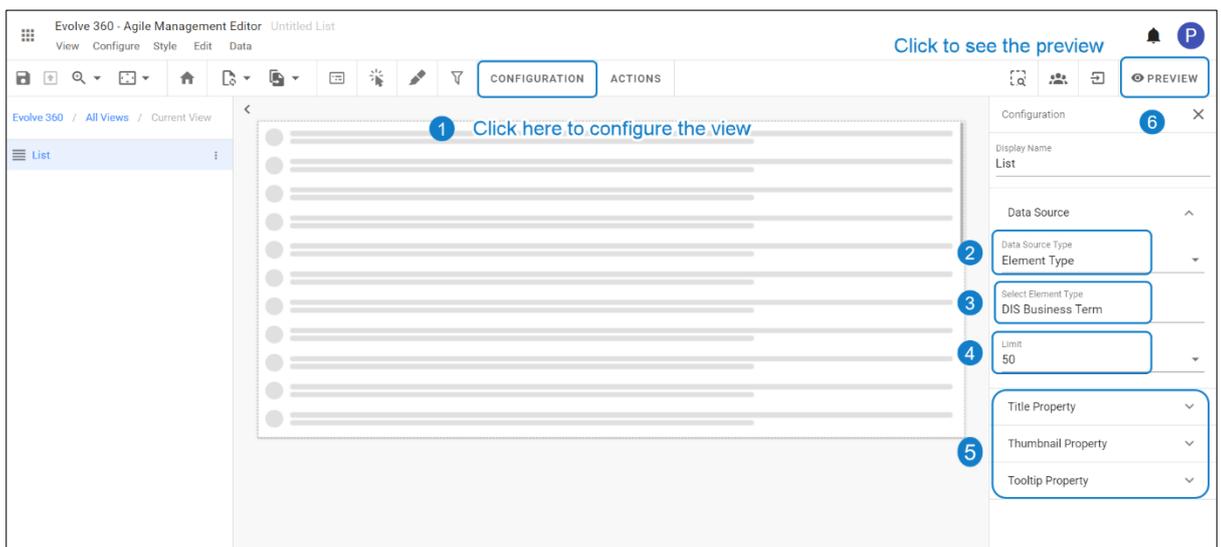
4. To add the **Properties**, click on **Configure** on the toolbar or right-click on the view being in the **Design Mode**.
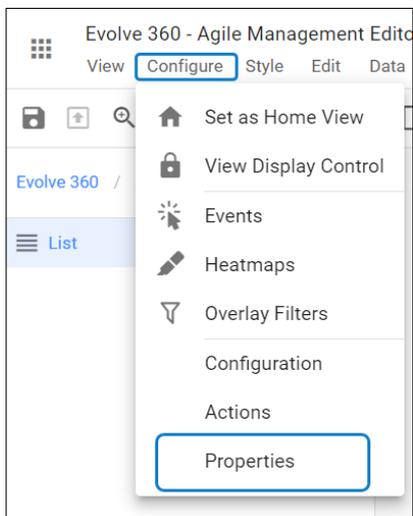
Click on + **Add Property**

By default, a property is set with **Name**. To edit click on the property or to add the other one, click on + **Add Property** from the right-side pane.

Select Element Type > **Select Property.**

Enable checkboxes if you wish.

Click on **Apply Changes.**
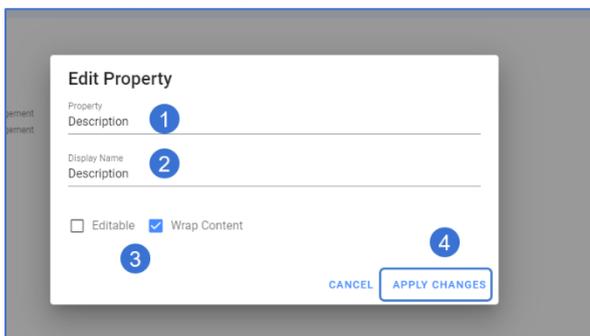
5. The preview of configured **List View** is shown in the picture below.
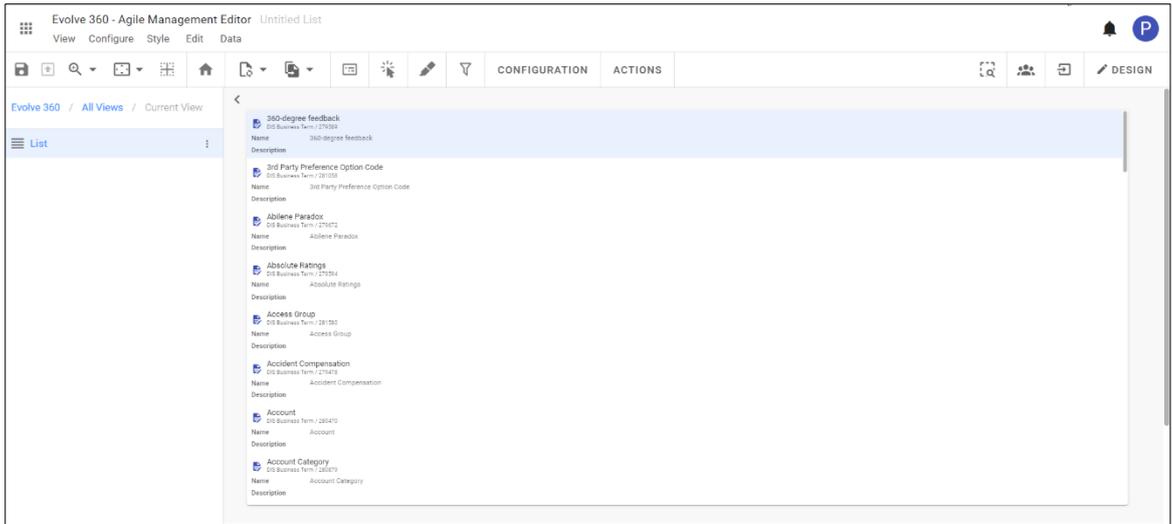
Diagram View

Diagrams are two types, **Manual** and **Auto** diagrams.

Manual Diagrams are integrated with **Diagrammer**, where you can create associations to the model and edit the diagrams manually.

Auto Diagrams uses the same diagram types, but the diagrams are automatically drawn based on the data. They are dynamic, reads the data and generates the diagram through it.

How to configure Manual Diagrams

Manual Diagrams works as **Object Type View**, which requires a context from the source.

An example to configure Manual Diagram,

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. For instance, choose a **Column Layout** with a **List** in the Column 1.
   Select **Data Source** as **Diagram.**
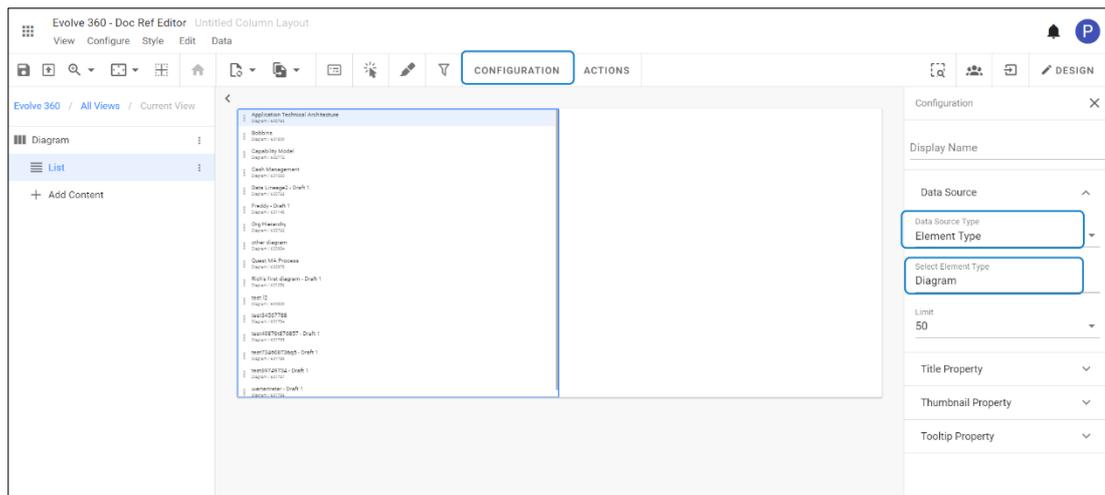
In column 2, select **Object Type View**
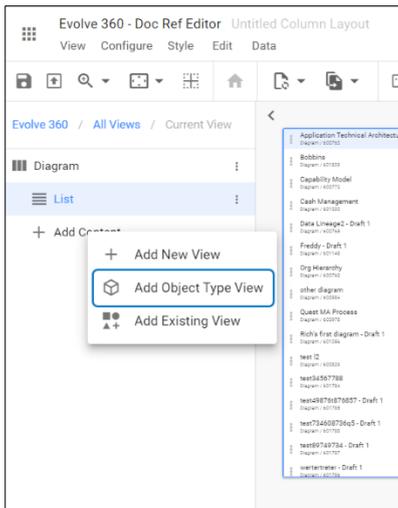
3. To pass the context from the source,

- Click on three dots against the **Object Type View** from the left side then select **Context Configuration.** Or go to the columns list and then click on column 2.
- Select **Context Source** > **Internal** > **Apply.**
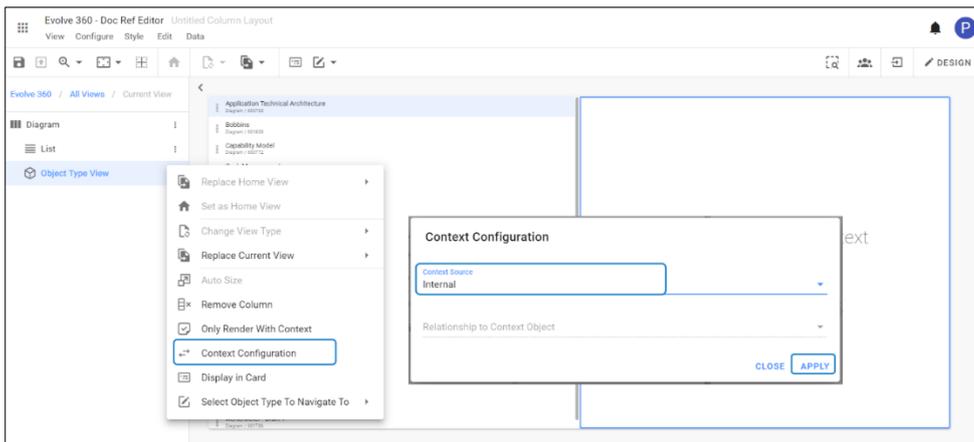
4. The Diagrams from the source will appear as shown in the picture below.

You can edit the diagrams to create association in the model. To edit, click on icon from the top right corner.
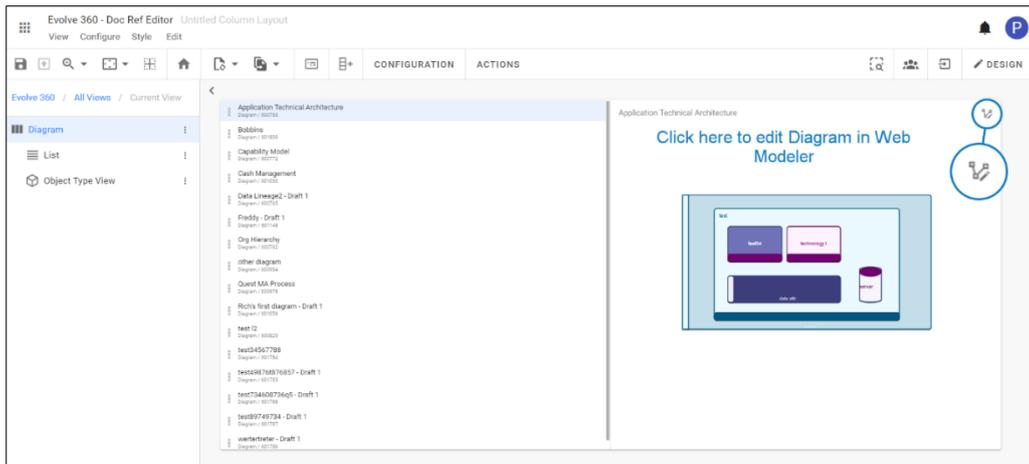
An editor called **Diagrammer** will be opened in the same space as shown in the picture below.
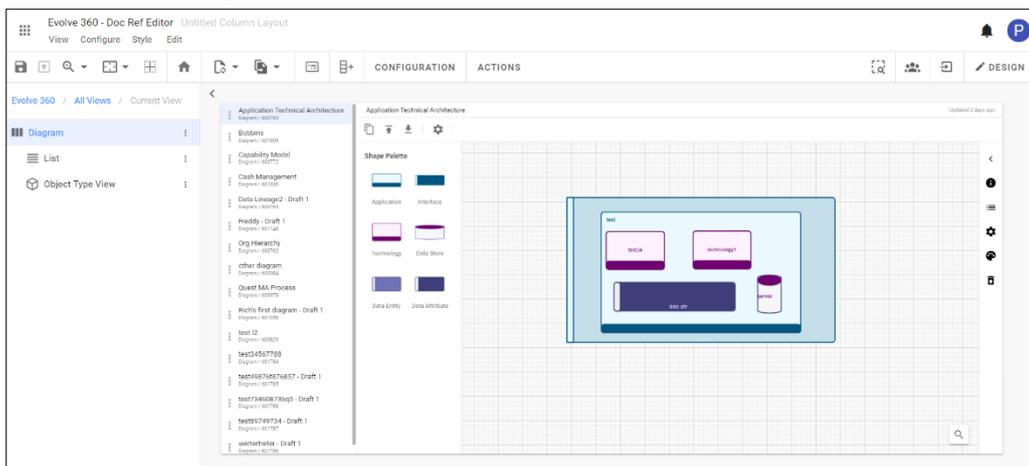
ℹ️ To know how to edit diagrams, see **Diagramming**

5. To create a new diagram to the list.

- Go to **Configure** on toolbar, then select **Actions.**
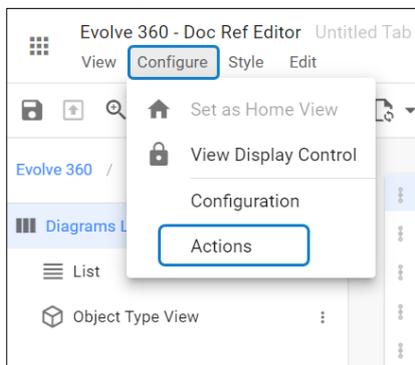
- Click on +**Add Action** from the right-hand side. To edit, click on New Action created or click on three dots against it.
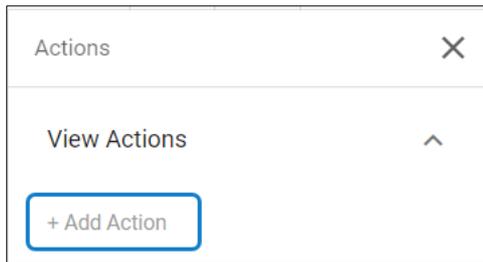
- Enter **Label** > set **Position** > select **Behavior** of the action.
  Choose **Diagram Type** and its **Behavior**
  Select **Icon** and **Color** to the new action
  Click on **Apply Changes**
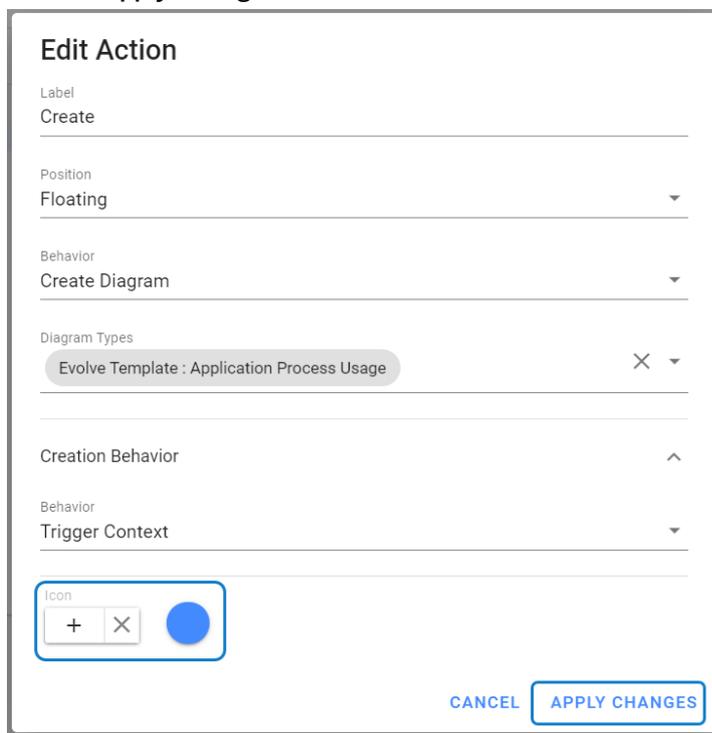
ℹ Select **Diagram Type** is mandatory, such that you are defining a model by following that set of defined rules.

ℹ Make sure you select **Create Diagram** instead of **Create** for the behavior of the action.

- To add the new diagram to the list, click on [＋] from the bottom of the column screen.
- Enter **Name** and **Description** of the new diagram, then click on **Add.**

i | Make sure you select **Create Diagram** instead of **Create** for the behavior of the action.

Automated Diagrams

Automated Diagrams are the in-built diagram models, which reads the data from the source. These diagrams come along with the package or model.

Built in we have 3 layouts called Hierarchy, left to right & box in box.

These auto-diagrams require a diagram template and can be configured to make them look just right.

Network View

Network View helps to show the relational data of the **Object Type** following the metamodel relationships.

Network View is typically applied when rendering the context from a single object instance.

An example for the Network View is shown below:

To create **Network View,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Network View** from the list.
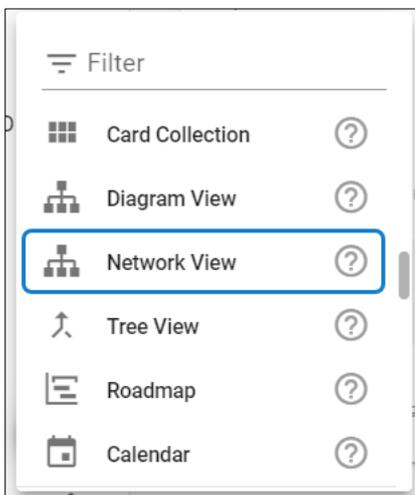
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
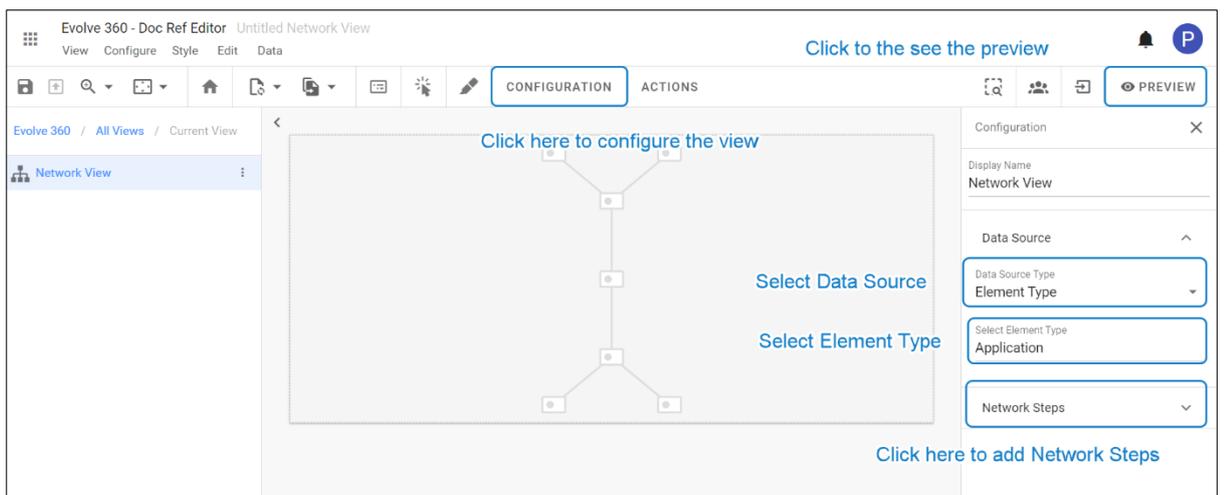
4. To add the steps to the Network, click on **Configuration** of **Network View.**

Go to **Network Steps** > **Add Step** > **Enter Label** > **Select Relationship Type** > **select Target Object Type** > **Add.**
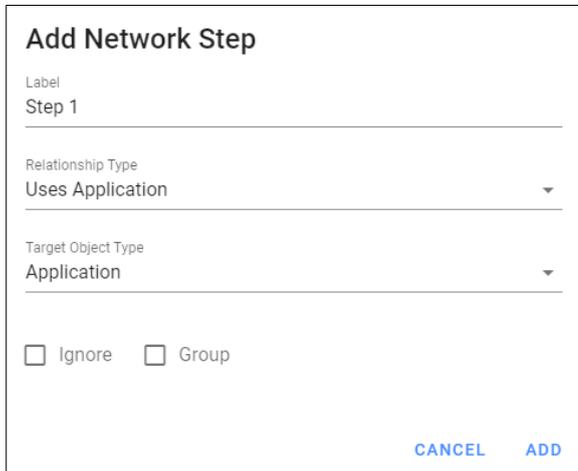
> ℹ️ Ticking the **Ignore** checkbox will still draw the step but will not return the results of that step.
>
> To group the step, tick the checkbox **Group.**

5. A **child step** can be added further to the associated Objects.

   To add the **child step,** click on three dots against the main step.

   Select **Add Child Step.**
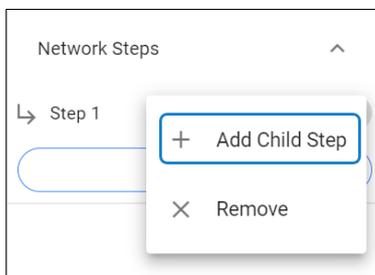
6. A preview of the configured **Network** is shown in the picture below.
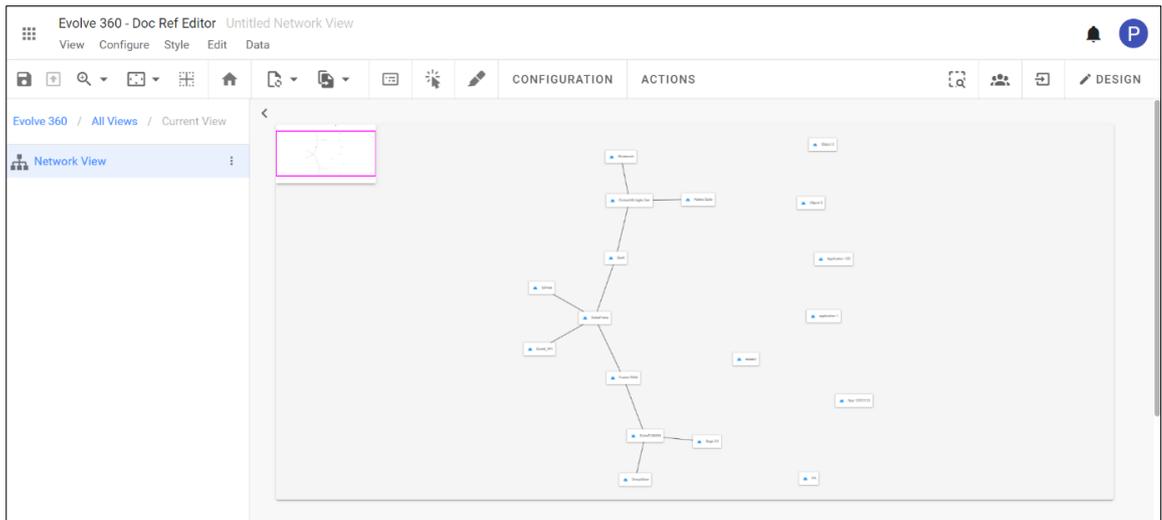
ℹ Make sure you know the relationships between the objects before configuring the **Network View.** To know the existing relations, go to **Profile** > **Relationship Types.**

ℹ Network View can also be configured as Object Type View, but it requires context to pass from source. To know, see Object Type View.

Tree View

Tree View help to visualize the relational data hierarchies of the objects.

To create **Tree View,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Tree View** from the list.
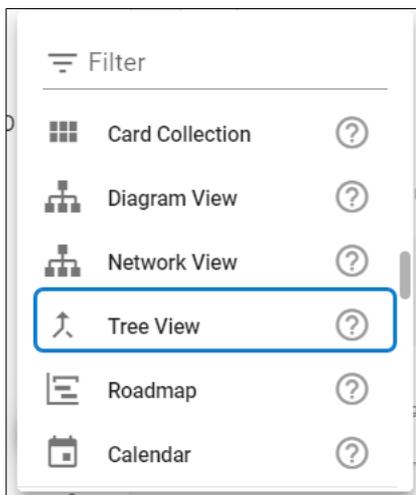
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Apply the **Title Properties, Thumbnail Property and Tooltip Property** as required.
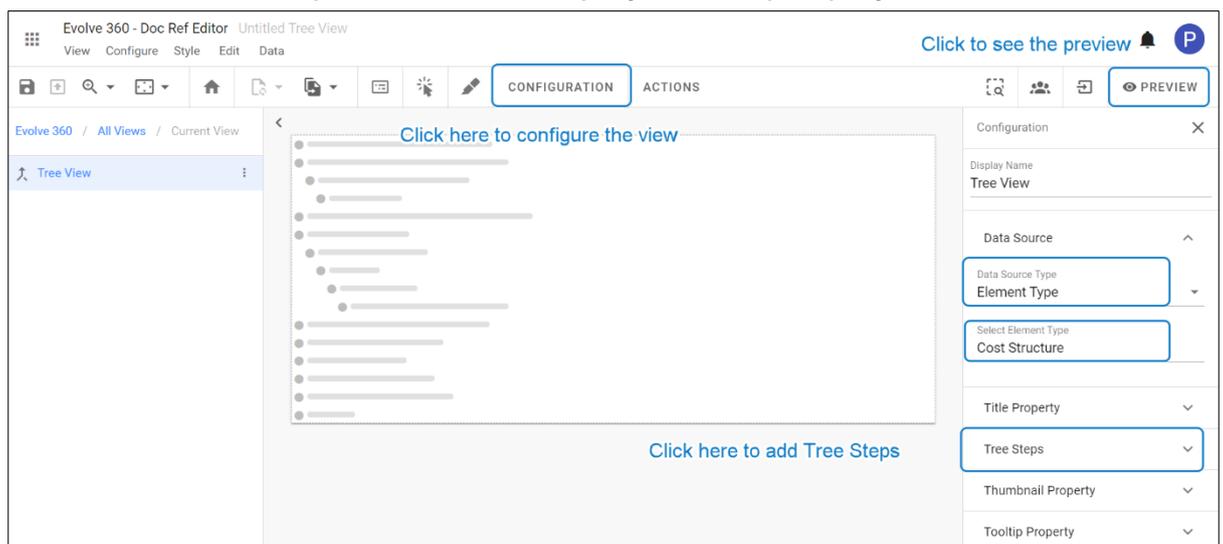
4. Defining **Data Source** is the first step for the **Tree View**. To add the next level step.

Click on **Tree Steps** > **Add Step** > **Enter Label** > **Choose Relationship Type** > **Select Target Object Type.**

Click on **Add.**

i | Ticking the **Ignore** checkbox will still draw the tree step but will not return the results of that step.

5. To see the step, click on an arrow against the source. A **Preview** of the configured Tree View is shown in the picture below.
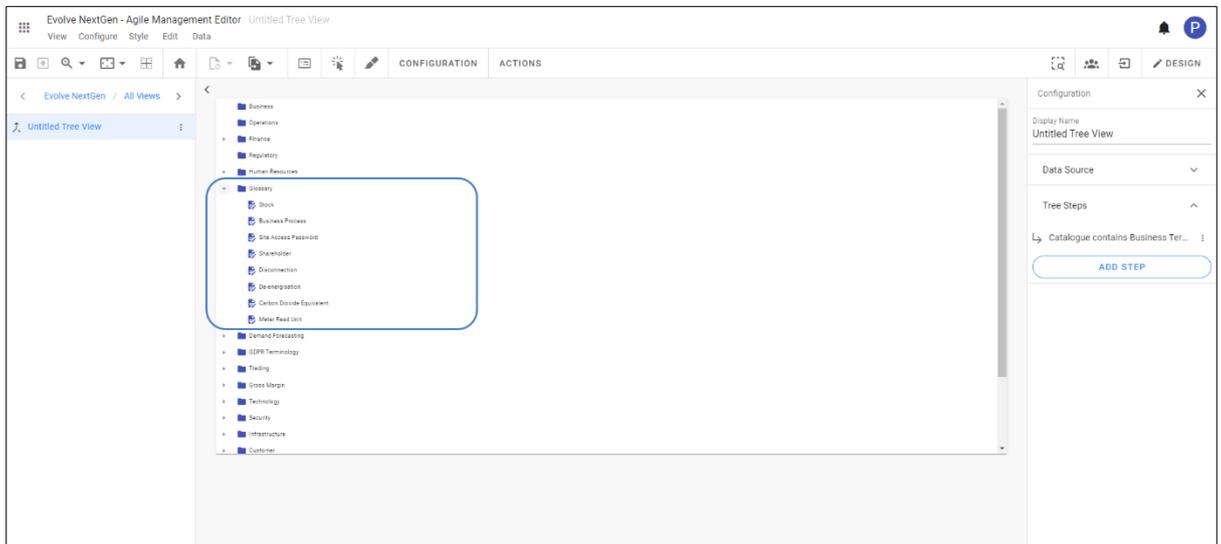
6. A **child step** can be added further to the associated Objects.

To add the **child step,** click on three dots against the main step.

Select **Add Child Step.**
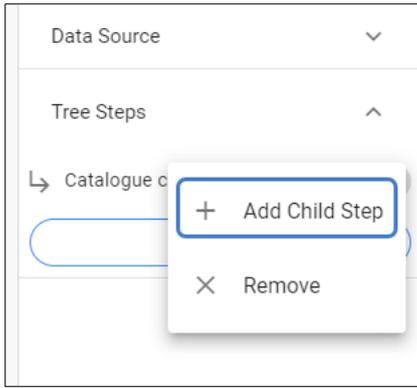
Enter **Label** > **Relationship Type** > **Target Object Type** > **Add.**

Roadmap View

Roadmap View help to visualize the data journey over a while.

To create **Roadmap View,**

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. Select **Roadmap** from the list.
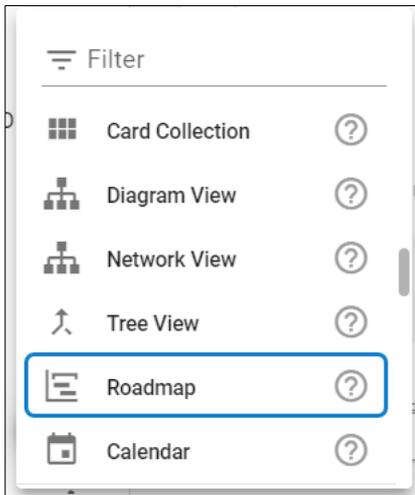
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Set **Limit** to display.
   - Apply the **Properties, Title Property** according to the view.
   - Click **Preview** to see the result.
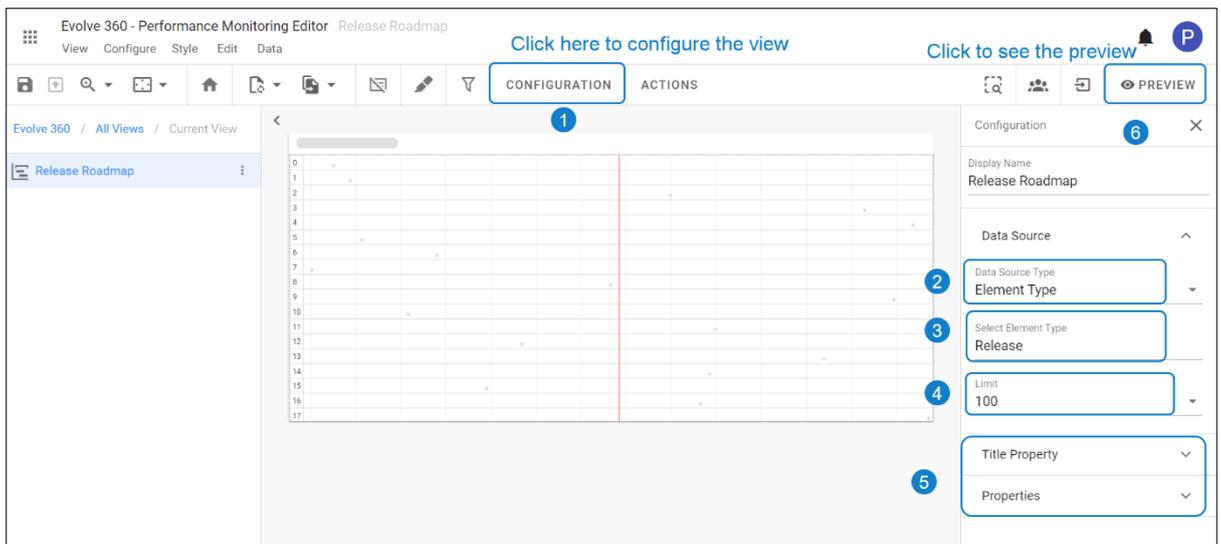
4. To apply the properties,

- Click on **Properties** > **Add Property.**
- Select **Source** and the **Property.**
- If **Start Date** is selected, enable **End Property,** and select the **Source** and **Property.**
- Select **Color** of you wish to apply and click on **Apply Changes.**

5. Click **Preview** to see the configured **Roadmap View.**
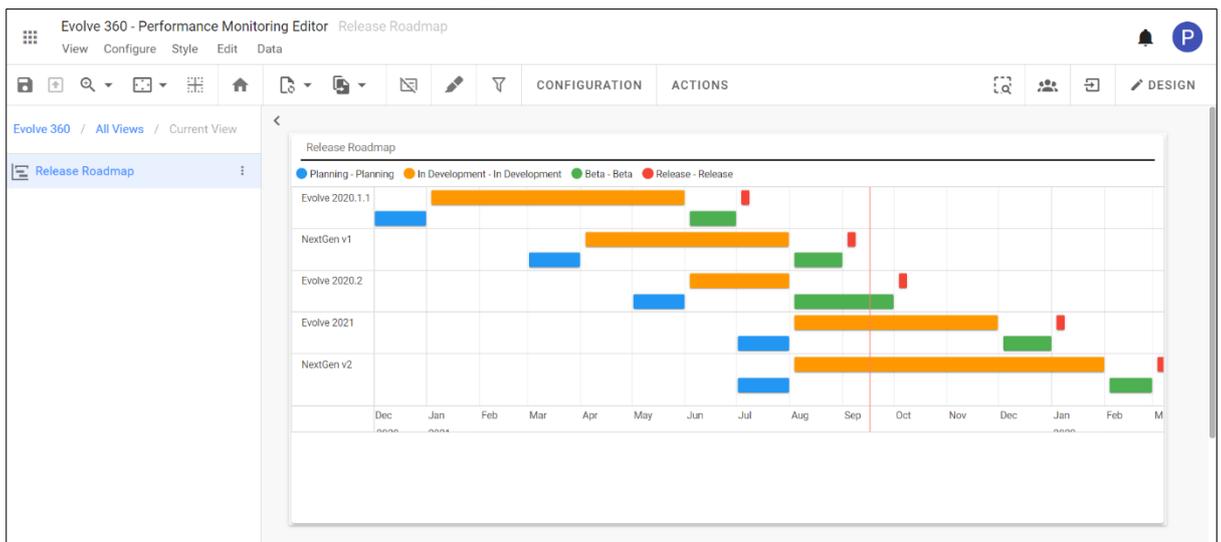
i To create a **Roadmap** view, you do not need to have both dates. It can also display with single points in time i.e., start date.

Calendar View

Calendar View help to keep track of upcoming events, appointments, and meetings reflected in the model with the date/time attributes.

To create **Calendar View,**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Calendar** from the list.
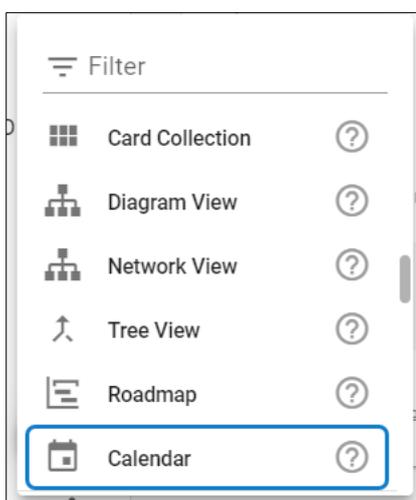
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Set **Limit** to display.
   - Apply the **Properties, Title Property and Tooltip Property** according to the view.
   - Click **Preview** to see the result.
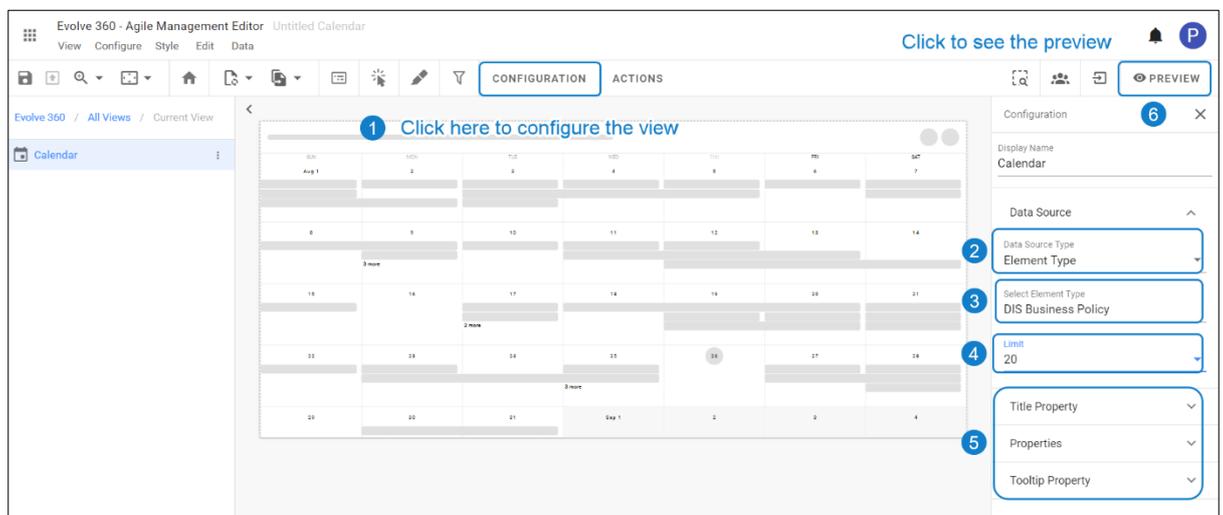
4. To apply the properties,
   - Click on **Properties** > **Add Property.**
   - Select **Source** and the **Property.**
   - If **Start Date** is selected, enable **End Property,** and select the **Source** and **Property.**
   - Select **Color** of you wish and click on **Apply Changes.**

5. Click **Preview** to see the configured **Calendar View.**
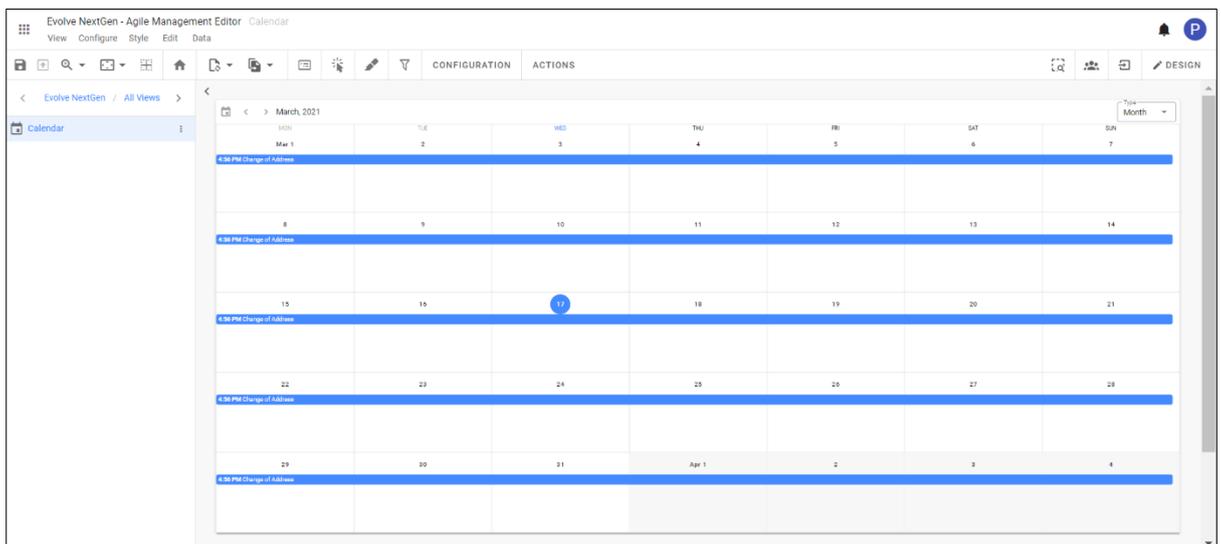
To create a **Calendar** view, you must define the **Start** and **End** properties and those should be dates.

Special Views under Collections

Special Views are the part of the **Collection Views**, which works with any **View** type or an **Object Type View**.

The configuration of these special views is similar except the appearance.

To see how to configure these special views, visit the below mentioned topics.

- **Accordion Collection**
- **Carousel Collection**
- **Tab Collection**
- **Card Collection**

Accordion Collection

Accordion Collection is a data driven view, allows you to see, navigate and interact with the model.

Using Accordion can categorize a form, or to create a flow to information.

To create **Accordion Collection**,

6. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
7. Choose the preferred layout. For instance, choose a **Menu.**

   Click on **+Add Content** and then select **Accordion Collection**.
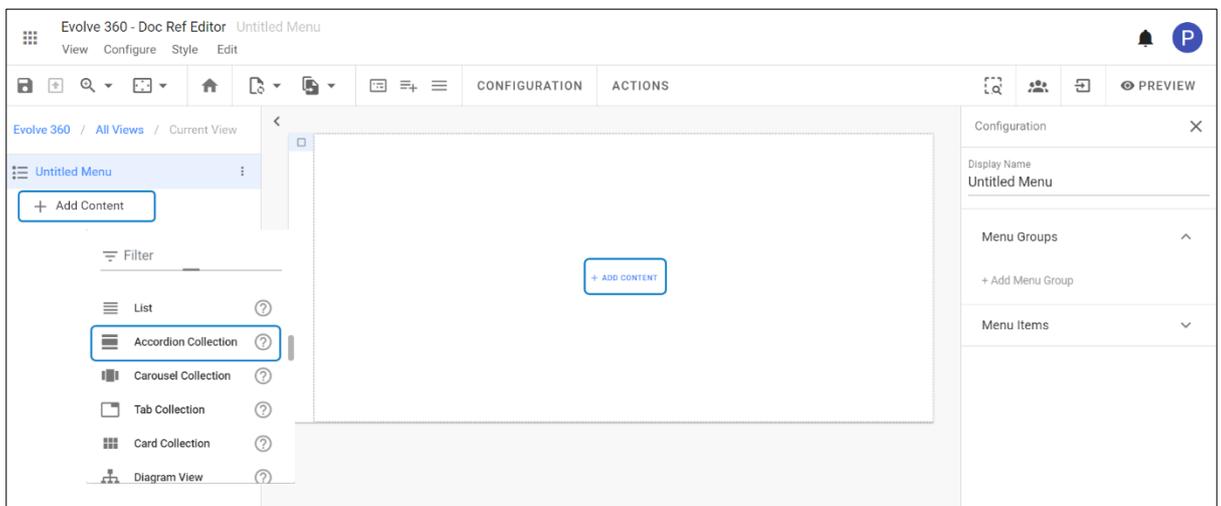
8. To configure the view,

   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Set **Limit** to display if needed.
   - Apply the **Properties** according to the view.
   - Click **Preview** to see the result.
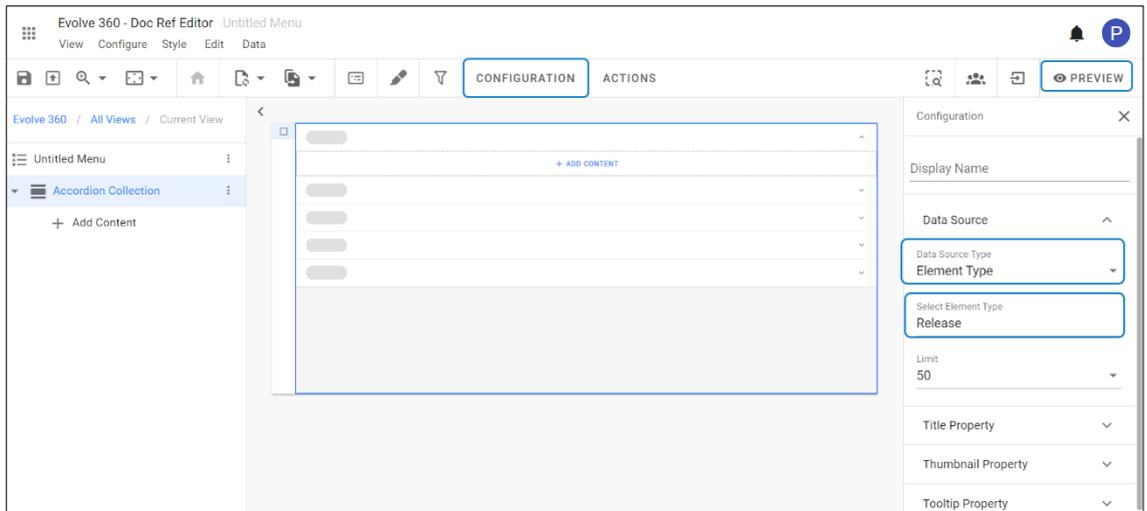
9. Now click on +**Add Content** to add the view type you wish to.

- For instance, in the below example a **List** and **a Pie Chart** is selected**.**
- For each view, select **Data Source,** and the **Element Type**.
- Apply other properties and limit if required.
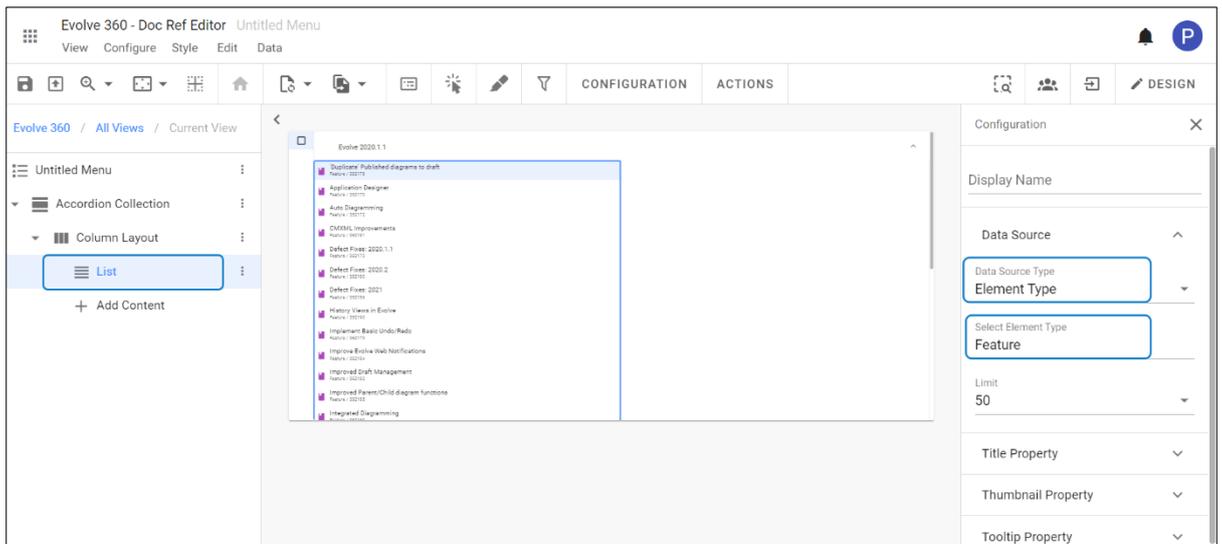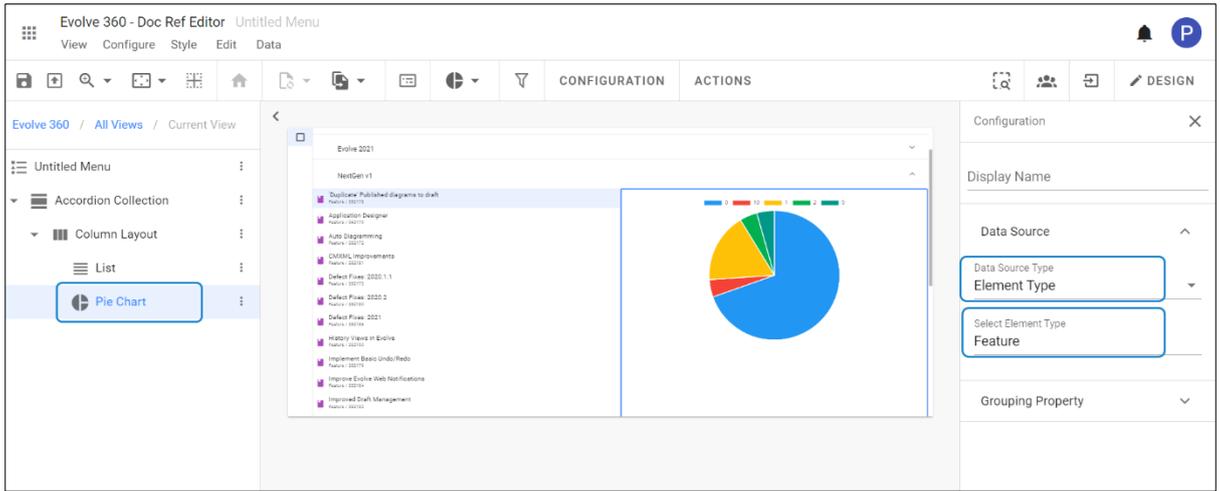
10. This Configuration of **List** and **Pie Chart** will be displayed for all **Accordion** items.

Carousel Collection

Carousel Collection cycles through the selection of views defined by application **Data Source.**

The Configuration process of Carousel is similar to the Accordion Collection.

To configure the **Carousel Collection**, see Accordion Collection and repeat the steps by selecting **Carousel** instead of **Accordion**.

The preview of the configured **Carousel Collection** is shown in the below picture.
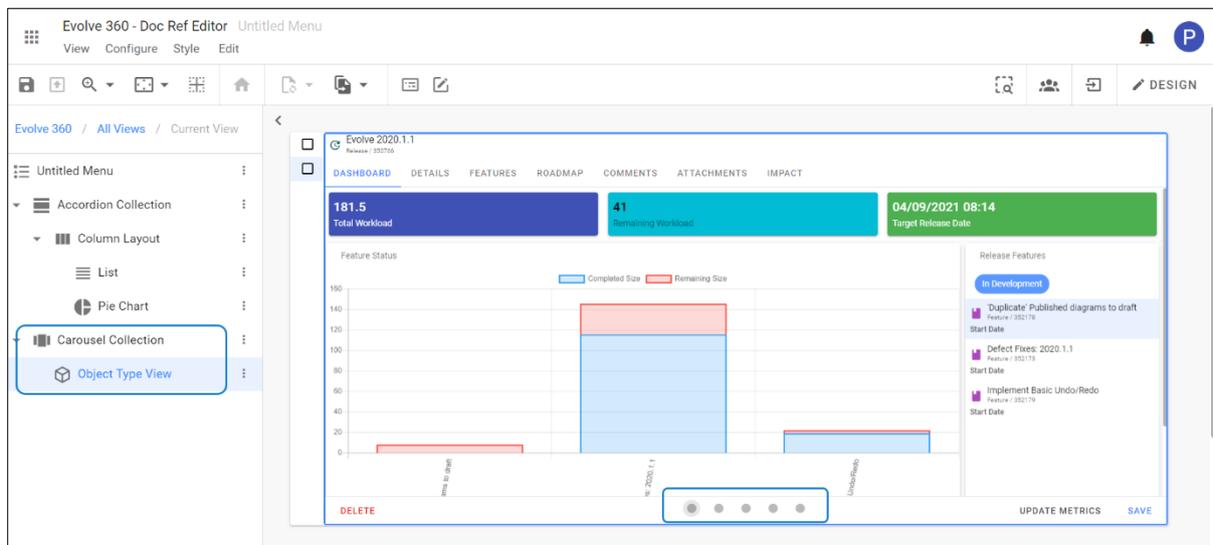
i The above is configured with the **Object Type View**. You can configure more by selecting any view type.

i Carousel items cycles one after the other. To know more, see Carousel Layout.

Tab Collection

Tab Collection is used to separate different concerns on a page.

The Configuration process of **Tab** is similar to the Accordion Collection.

To configure the **Tab Collection**, see Accordion Collection and repeat the steps by selecting **Tab** instead of **Accordion**.

The preview of the configured **Tab Collection** is shown in the below picture.
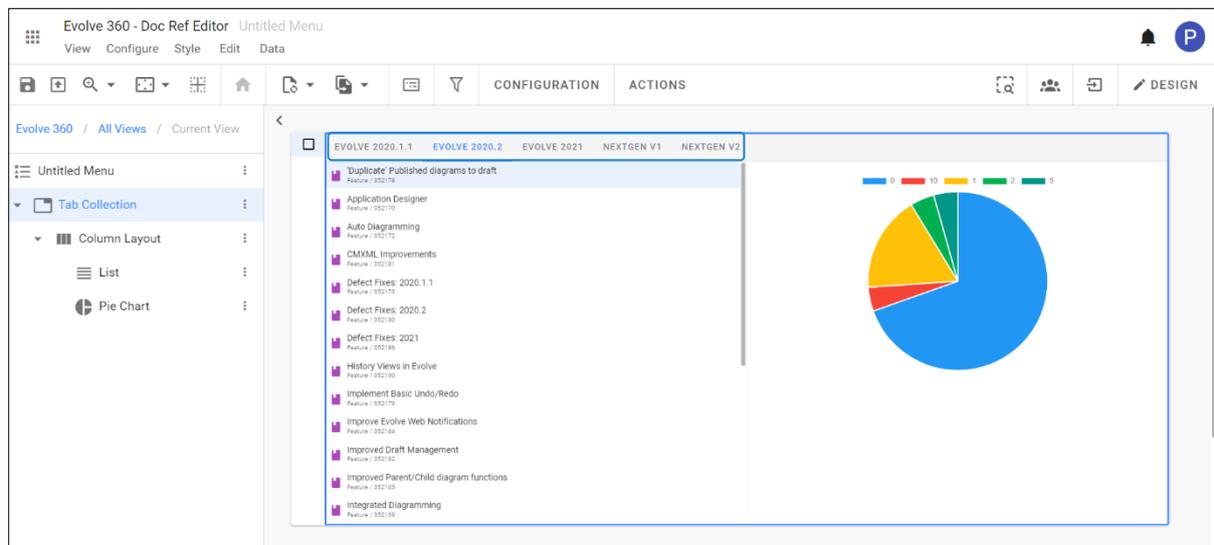
Card Collection

Card Collection allows to visualize and interact with multiple objects on the page at once.

The Configuration process of **Card Collection** is similar to the Accordion Collection.

To configure the **Card Collection**, see Accordion Collection and repeat the steps by selecting **Card** instead of **Accordion**.

The preview of the configured **Card Collection** is shown in the below picture.
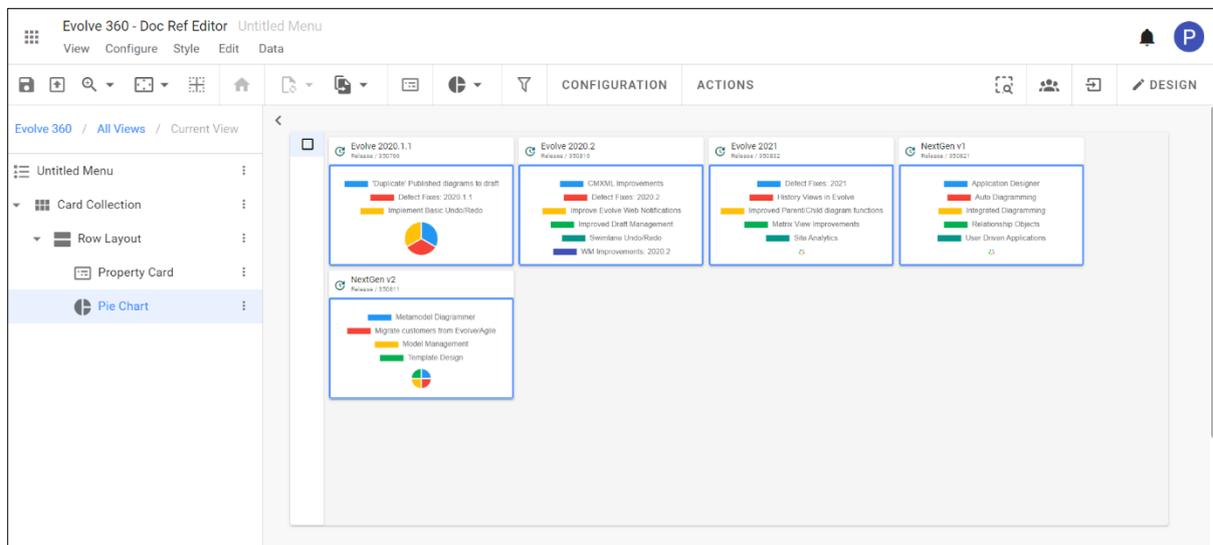
Charts

Chart Views works with data analysis to condense a large amount of data into an advanced visualization. The choice of **Chart** type depends upon the metrics and the properties of the **Object.**

The Charts available to handle the data visualization are:

1. Count
2. Count Comparison
3. Word Cloud
4. Bar Chart
5. Pie Chart
6. Line Chart
7. Radar Chart
8. Scatter Chart
9. Pivot Table

Count

Count View helps to display the data by highlighting a specific piece of information or metric in a card.

To create a **Count View:**

Count Views are best to apply along with the layout.

E.g., with the combination of Row and Column Layout.

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Choose the preferred layout. For instance, choose a **Column Layout**.
   By default, a layout with two columns will appear. Click on + **Add Content.**
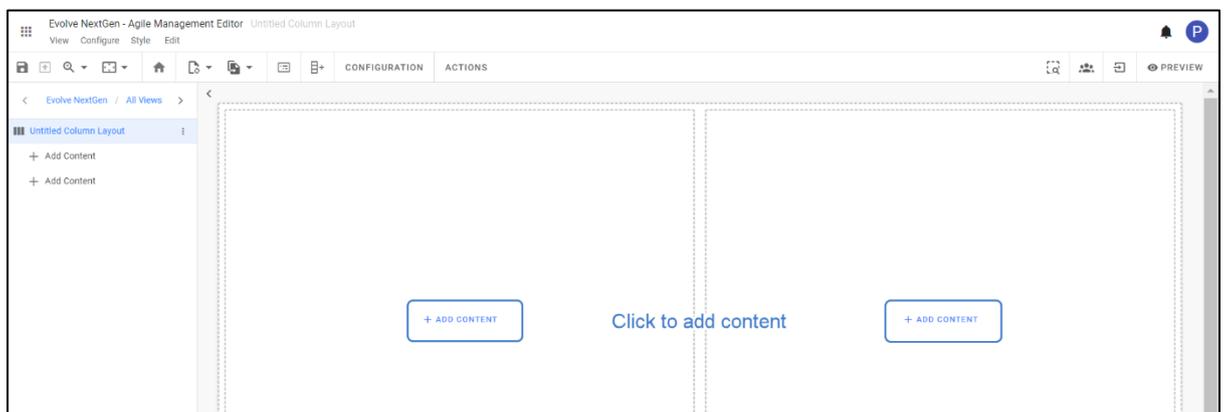
Select **Count** from the list.
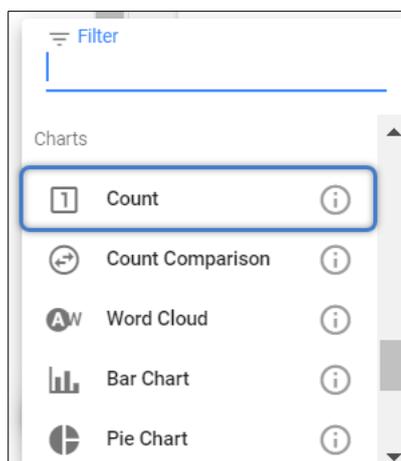
3. To configure the view, click on **Configuration** on the toolbar or right-click on the view to see the list and then select.
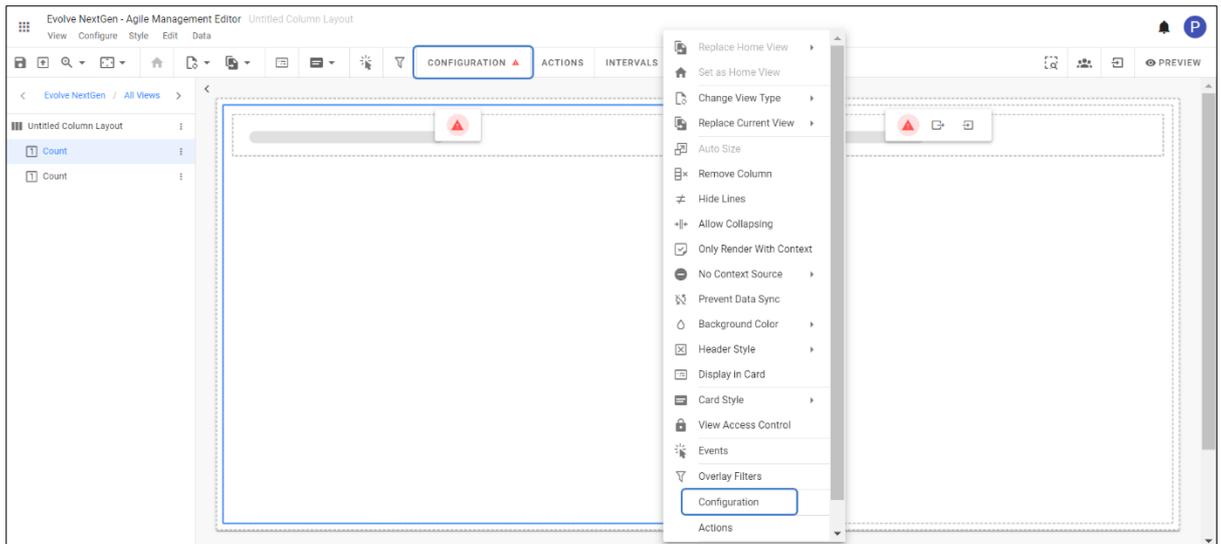
After configuration of your own element type choice, the preview of the view looks like as shown in the picture below.

> **i** You can create custom data sources to return specific queries using Filters.
>
> E.g., How many element types have an attribute set to true.

4. You can set the **Intervals** to change the color of the count. An icon will be displayed, once the returned metric hits a user-defined number.

   To set an **Interval,**

   - Go to **Configure** on the toolbar and then select **Intervals** or by right-clicking on the view.
   - Click on **Add Interval** from a section that appears on the right side of the screen.
   - Enter **Minimum** and **Maximum** Values of the Interval.
   - Select the **Icon** and **Color**.
   - Click on **Apply Changes**.

Steps to set Intervals
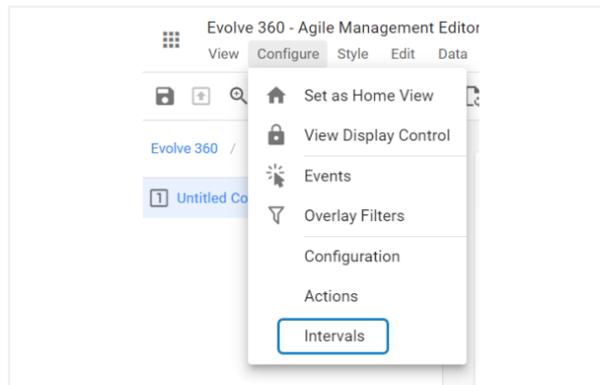
1 Click on **Configure**
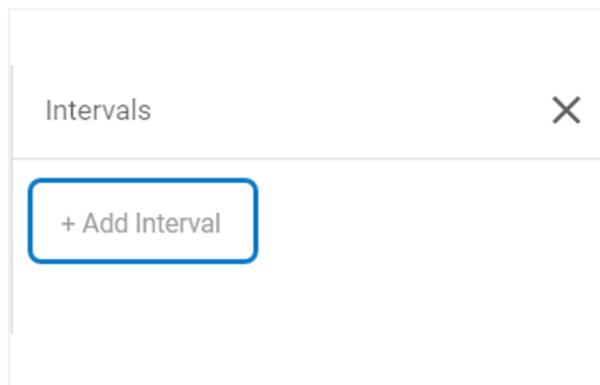
2 Click **+Add Interval**
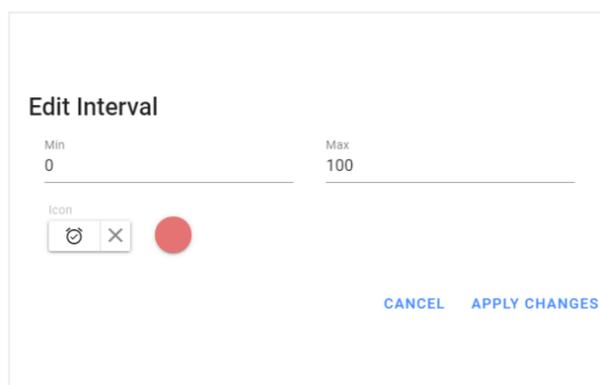
3 Enter **Minimum** and **Maximum** Values.
Select **Icon** and **Color**
Click on **Apply Changes**

Count Views looks as shown in the figure below.

The appearance of **Count View** can be customized in three ways with the help of **Card Style.**

To apply the style, click on the **Card Style** icon on the toolbar or right-click on the view, you wish to apply.
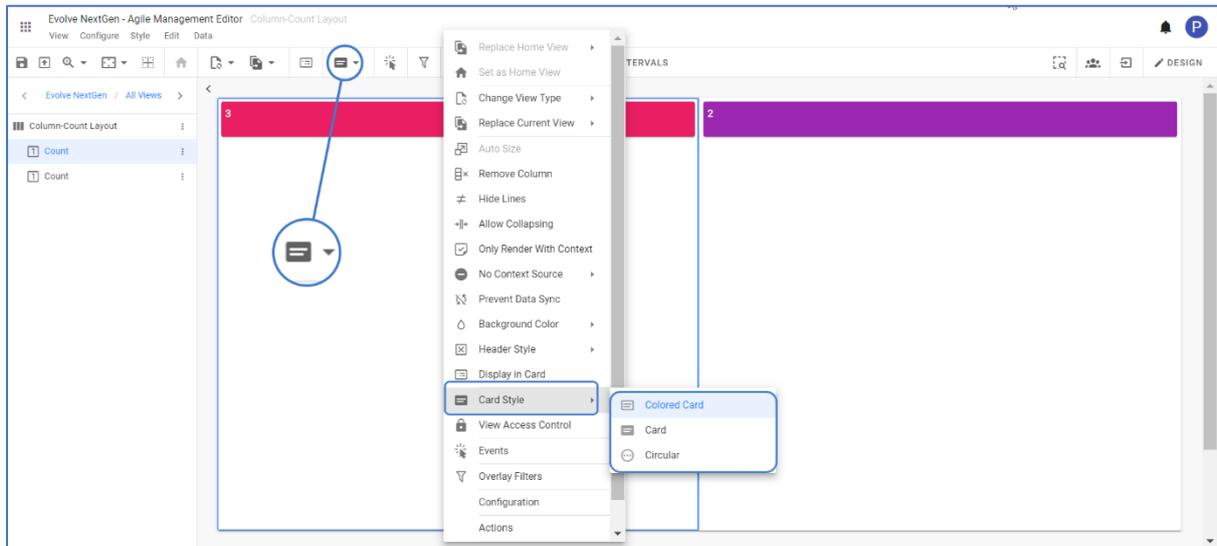
- Colored Card – displays with a different choice of colors.

- Card – is a simple card type with transparent background.
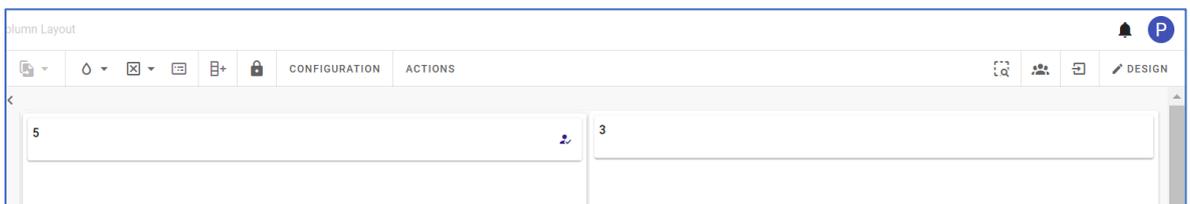
- Circular – is a Card Style displayed in the colored annulus.
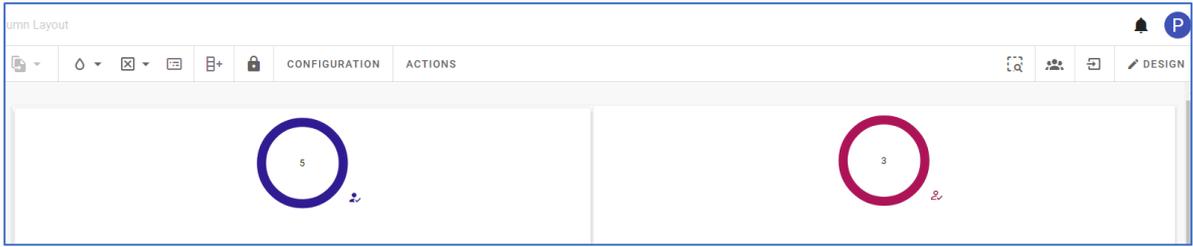
Count Comparison

Count Comparison View helps to display the count compared to the set of results of two different queries which often displays one value out of another.

Configuration of **Count Comparison** is much like the **Count View** which is always displayed as an absolute value. It is during the configuration of color change on intervals that will be triggered as an **Absolute** value or **Percentage.**

To create a **Count Comparison View:**

Count Comparison Views are best to apply along with the layout.

E.g., with the combination of Row and Column Layout.

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Choose the preferred layout. Click on + **Add Content** > + **Add New View** > **Select Count Comparison** from the list.
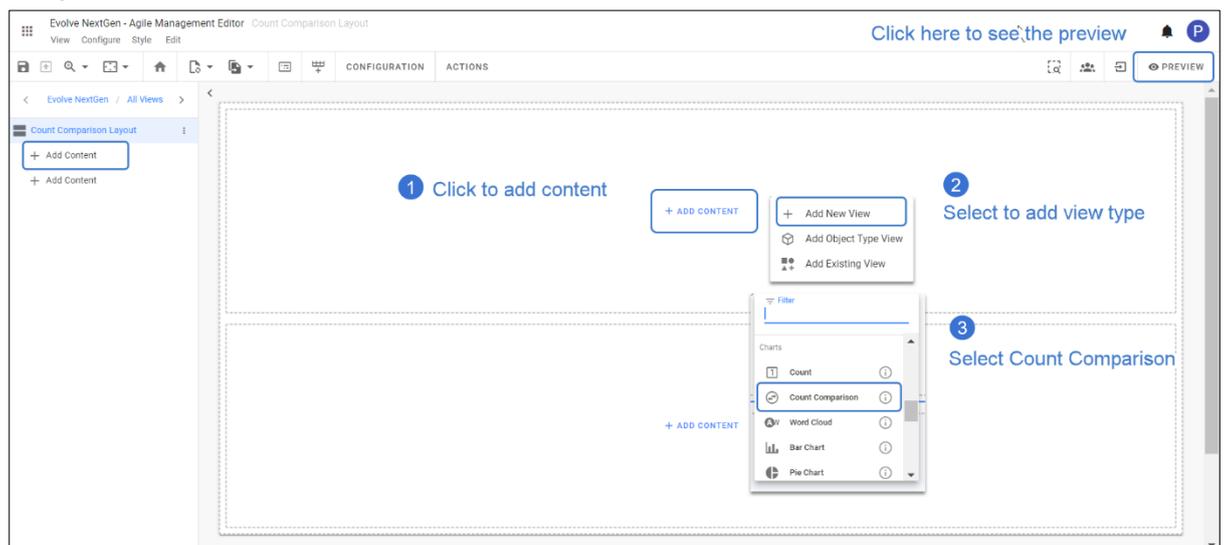
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or select **Filter**, for both **Numerator** and **Denominator.**
   - For Instance, select filter for the Numerator and the element for the Denominator.
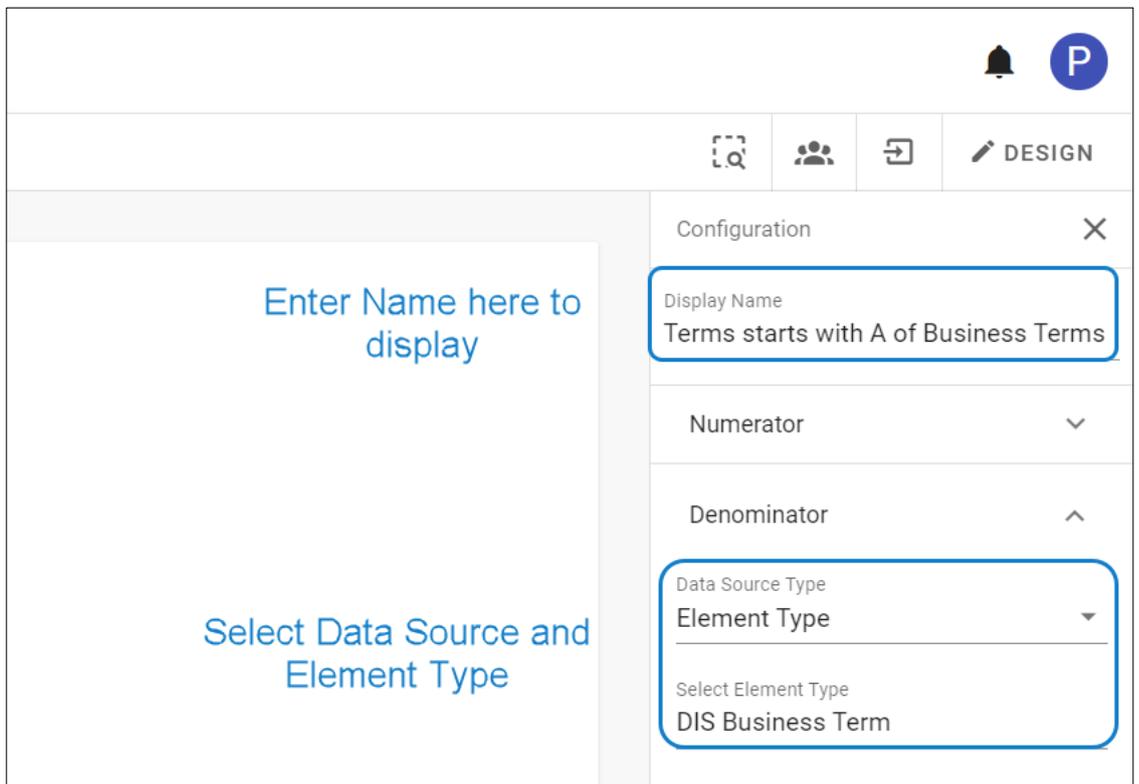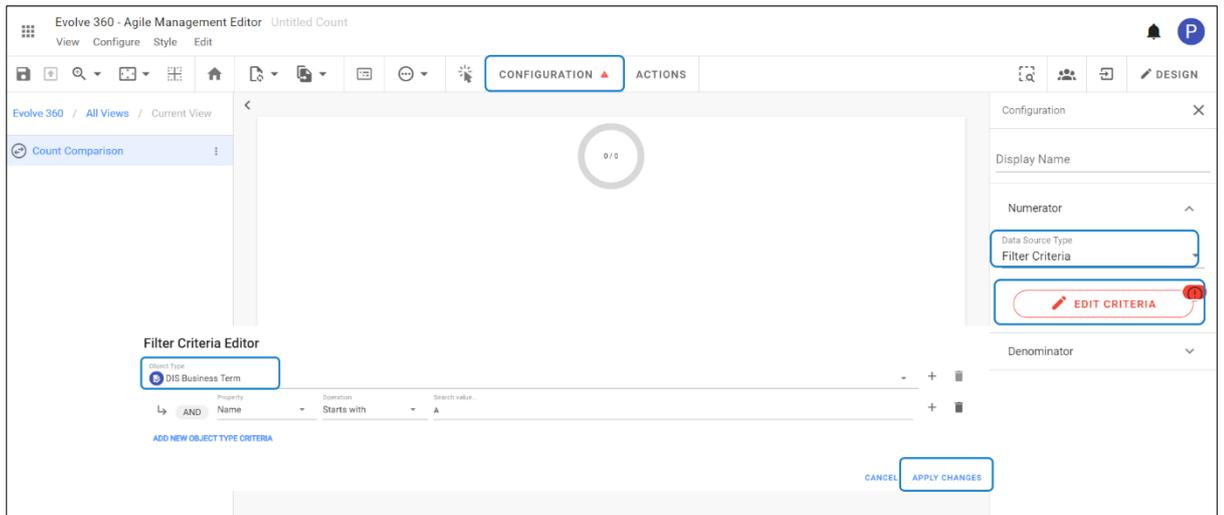
4. You can set the **Intervals** to change the color of the count and to display an icon.

   To set an **Interval,**

   - Go to **Configure** on the toolbar and then select **Intervals** or right-click on the view to select.
   - Select **Absolute** if the returned **Numerator** value falls between the two values.
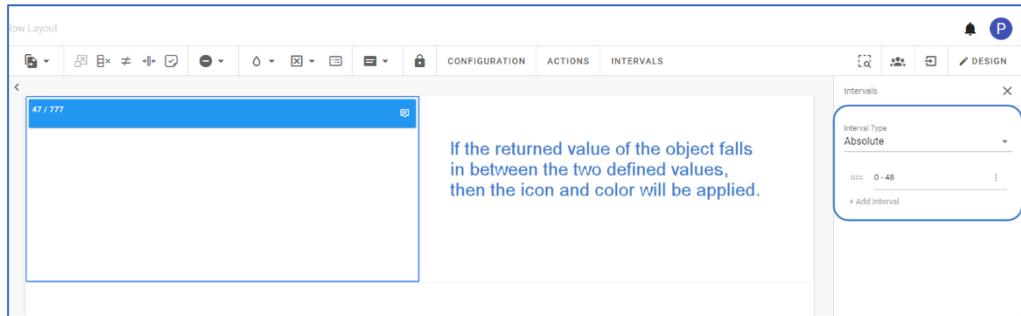
- Select **Percentage** if the **Numerator** value falls between the two portions of the overall denominator percent.
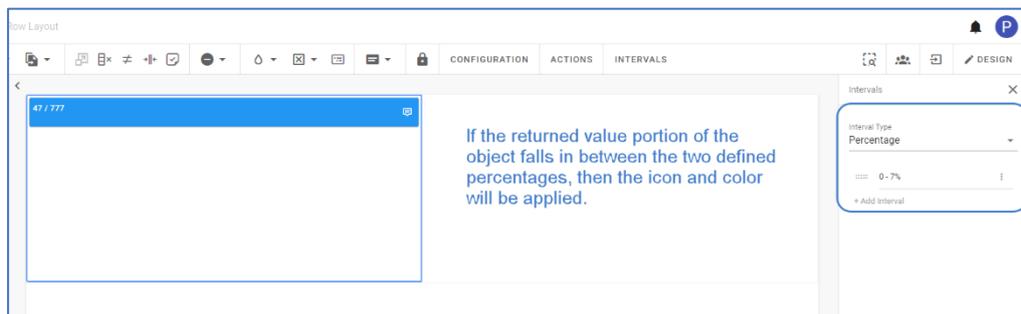
- Click on **Add Interval** from a section that appears on the right side of the screen.
- Enter **Minimum** and **Maximum** Values of the Interval.
- Select the **Icon** and **Color**.
- Click on **Apply Changes**.

5. To apply the style, click on the **Card Style** icon on the toolbar or right-click on the view, you wish to apply. You can choose the preferred style either in **Card** or **Circular** as shown in the figure below**.**
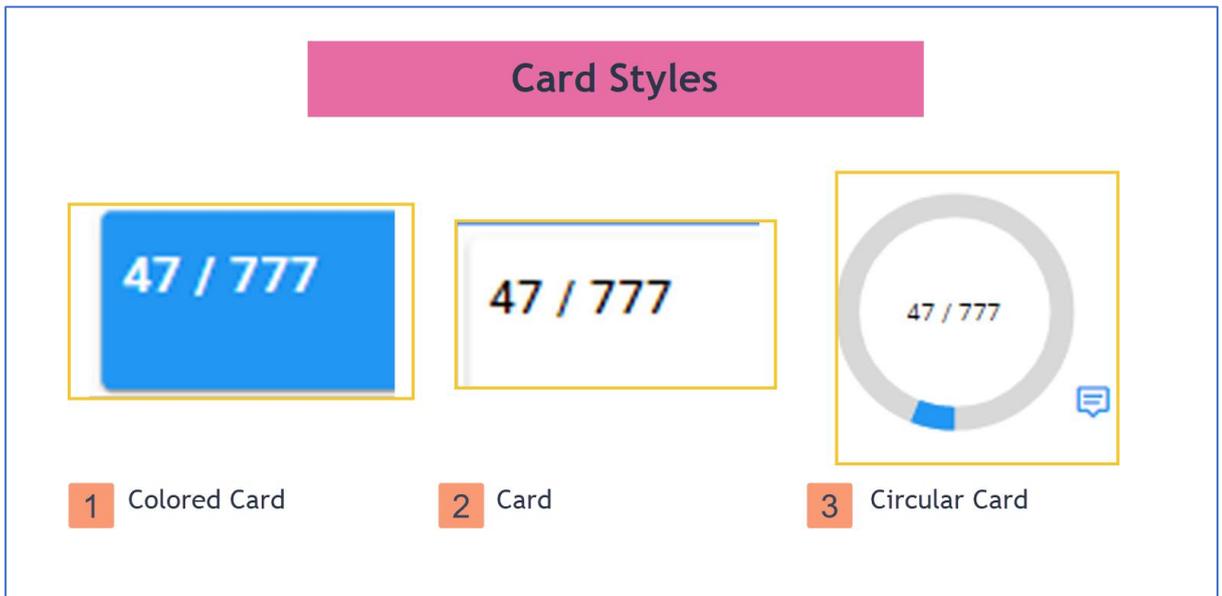
Word Cloud

Word Cloud is a visualization format that highlights the important and specific words of the **Element.**

Word Cloud is not only for the specific element type, but a query can also be defined or can select the list stored in the application.

To create a **Word Cloud View:**

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. Select **Word Cloud** from the list of charts.
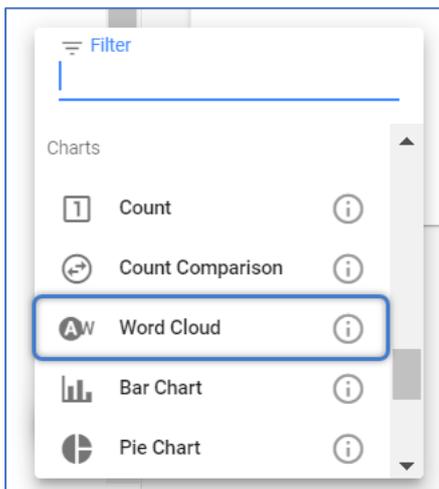
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Click **Preview** to see the result.
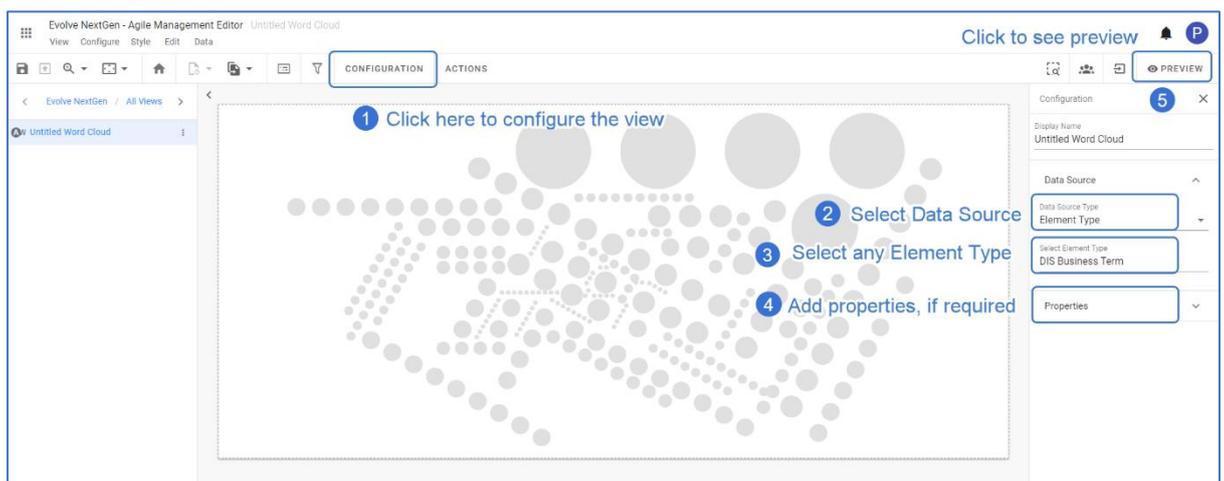
4. By default, the **Property** is set with **Name**. Thus, **Preview** displays the names of the selected **Element Type** as shown in the picture below.

Bar Chart

Bar Chart helps to represent categorical data using the number of bars.

To create a **Bar Chart View**:

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Bar Chart** from the list.
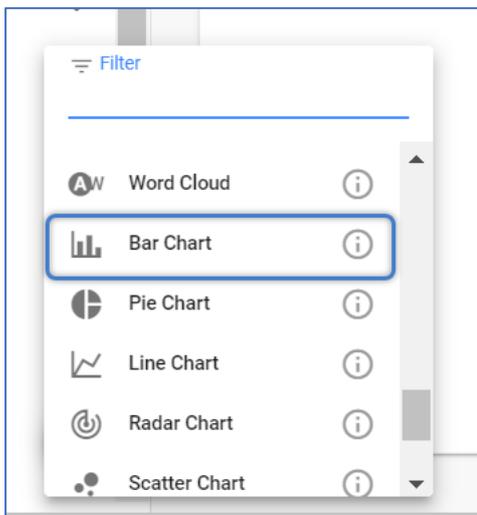
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
     Refer to the image below to see how **Bars** can be **Grouped** or **Stacked** and can be viewed in **Horizontal/Vertical** bars.
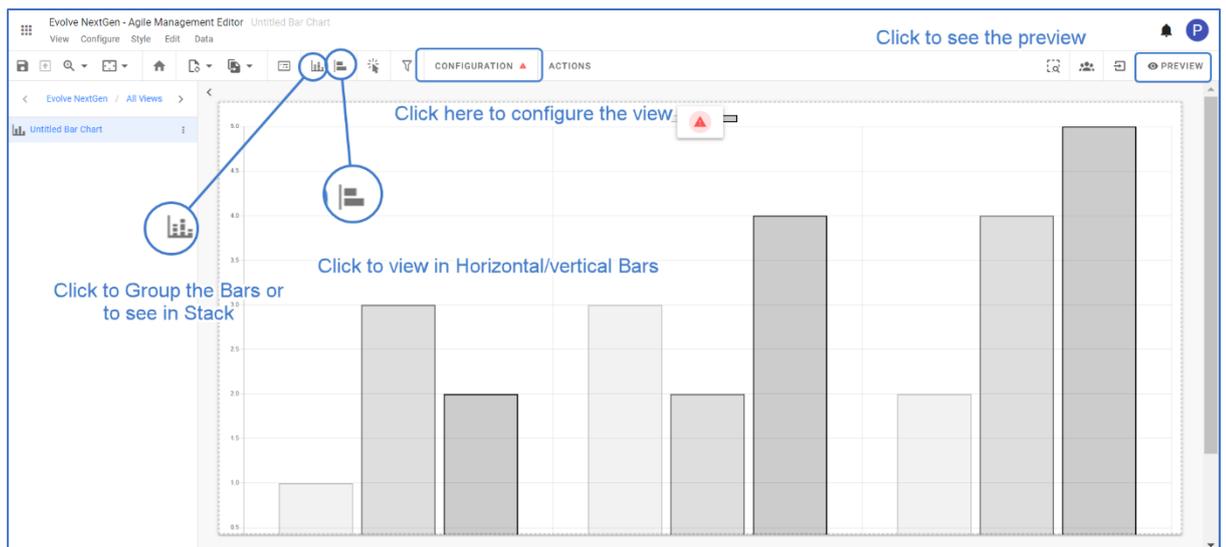
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.

- Set **Limit** to display.
- Apply the **Properties, Tooltip and Title Property** according to the view.
- Click **Preview** to see the result.
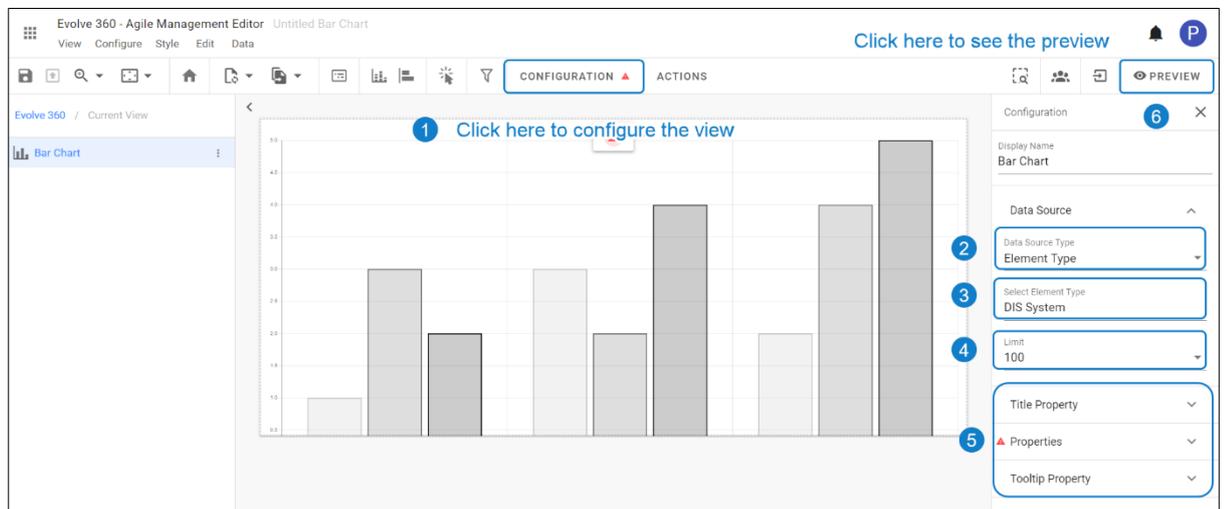
4. By default, a **Property** is set with **Name**. It is mandatory to set the property according to the Data Source.

   To add the **Properties**,

   - Click on **Properties.** To add the new one, click on **Add Property** or click on the existing property to edit.
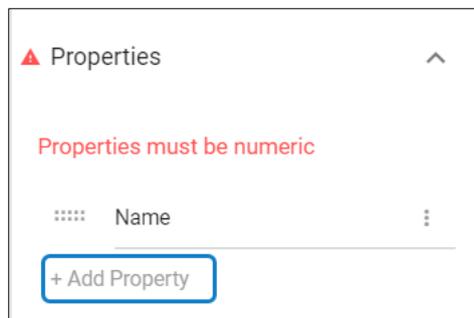
   - Select **Source Element Type** > **Property.**
   - Click on **Apply Changes.**

Edit Property

Property
Number of Tables

Display Name
Number of Tables

CANCEL   **APPLY CHANGES**

ℹ️ Properties applied must be Numeric.

5. The preview of the configured **Bar Chart** is shown in the picture below.
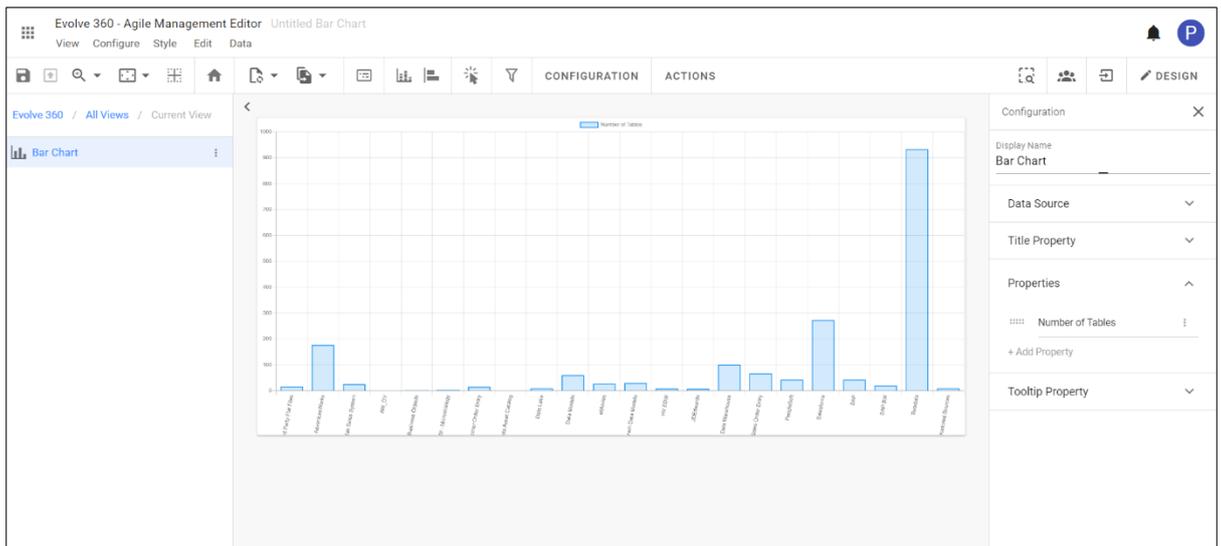
6. To display the **Stacked Bar Chart,** two or more attributes should be added to the **Properties.**

To view the **Stacked Bar Chart,** click on the icon [icon] on the toolbar.

A preview of the **Stacked Bar Chart** with three attributes is shown in the picture below.

Pie Chart

Pie Chart helps to represent proportions of data.

To create a **Pie Chart View**:

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Pie Chart** from the list.
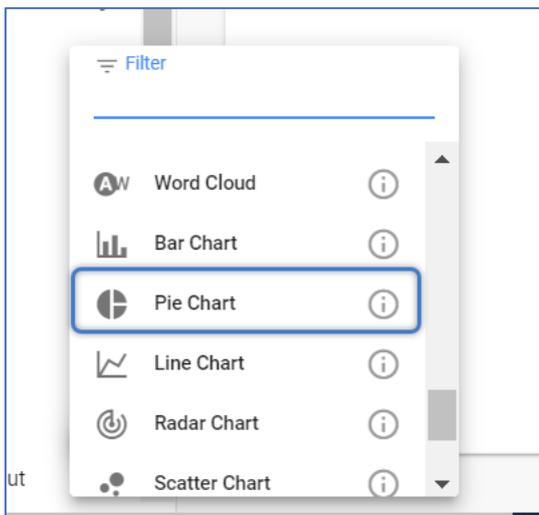
3. To configure the view,
   - Click on **Configuration** on the toolbar or right-click on the view.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Select **Properties** to group.
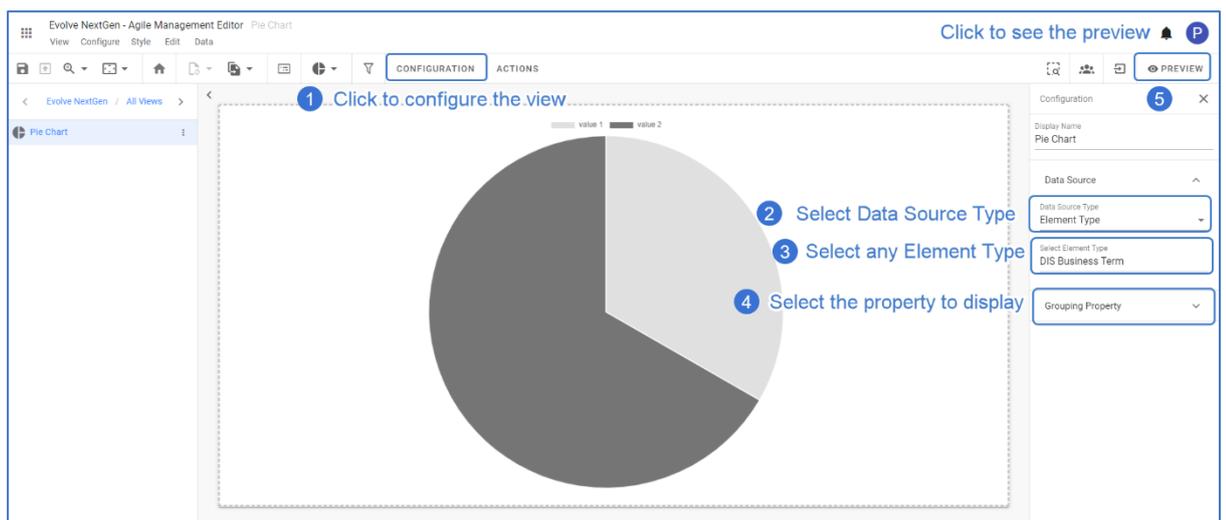
   - Click **Preview** to see the result.
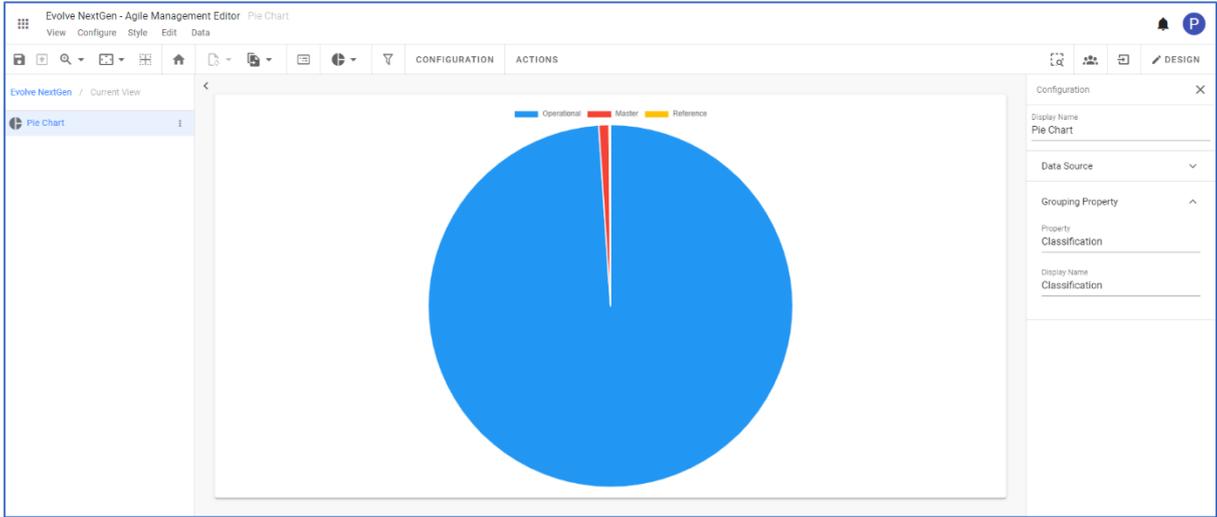
Line Chart

Line Chart helps to compare multiple numeric attributes.

To create a **Line Chart View**:

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. Select **Line Chart** from the list.
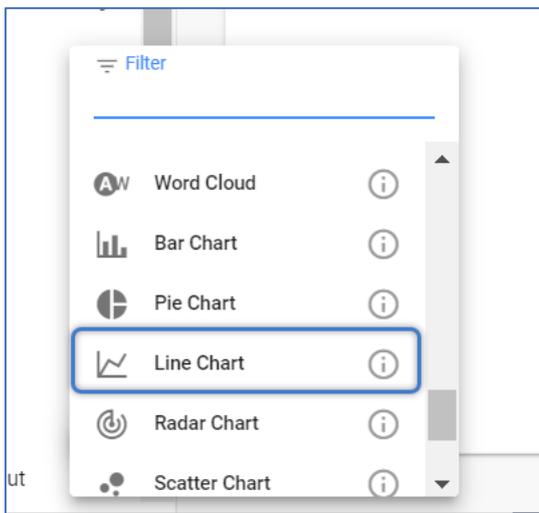
3. To Configure the **Line Chart,**
   - Click on **Configuration** on the toolbar or right-click on the view to select.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Set **Limit** to display if needed.
   - Applying **Properties** is must to configure the **Line Chart**.
   - Click **Preview** to see the result.
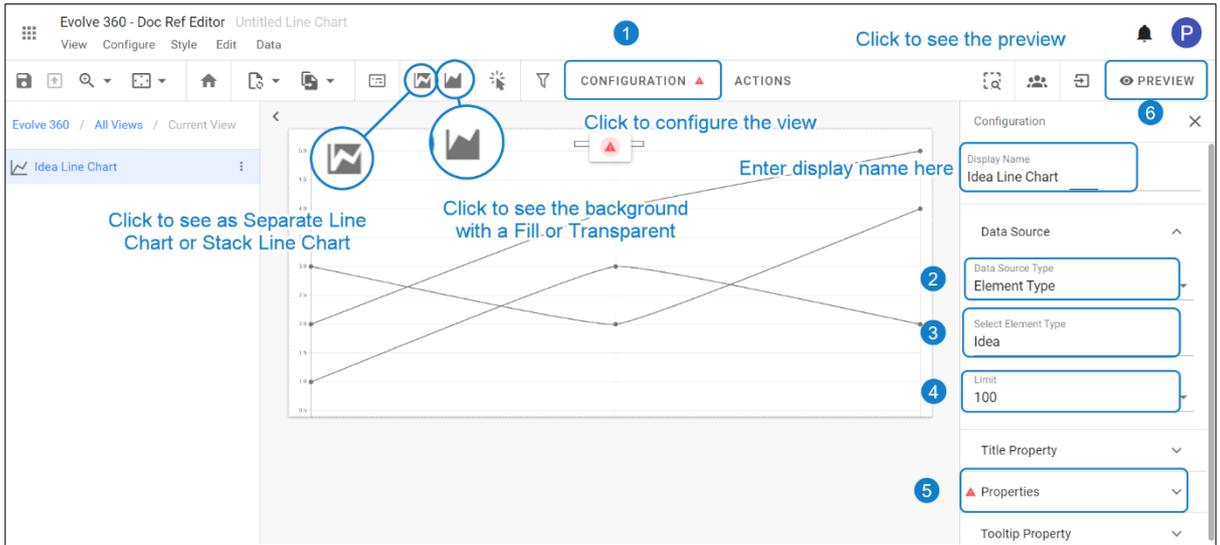
- To add the **Properties**, click on +**Add Property**
- Select the **Data Source**, and the **Property.**
- Click on **Apply Changes.**
- The preview of the configured **Line Chart** is shown in the picture below.
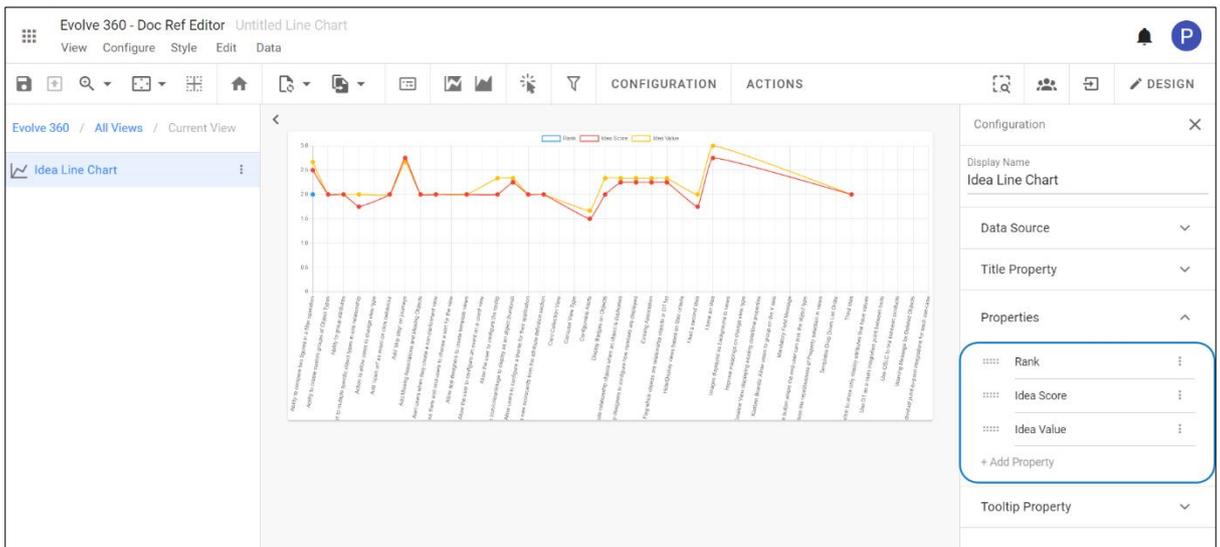
ℹ Properties selected must be Numeric.

Radar Chart

Radar Chart helps to present multivariate data by comparing multiple numerical attributes.

To create a **Radar Chart View**:

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Radar Chart** from the list.
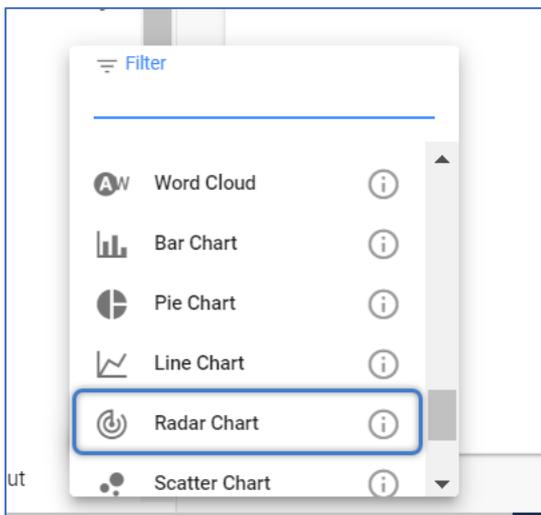
3. To Configure the **Radar Chart,**
   - Click on **Configuration** on the toolbar or right-click on the view to select.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Set **Limit** to display if needed.
   - Applying **Properties** is must to configure the **Radar Chart**.
   - Click **Preview** to see the result.
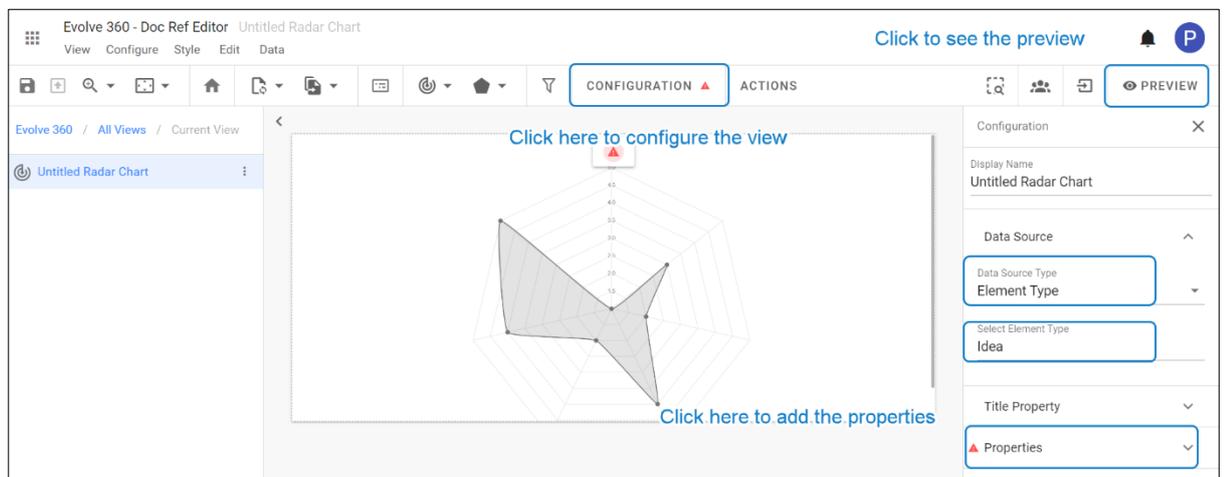
   - To add the **Properties**, by default the property is set with a **Name**.

- To add the new property, click on +**Add Property**
- Select the **Data Source**, and the **Property.**
- Click on **Apply Changes.**
- The preview of the configured **Radar Chart** is shown in the picture below with the properties.
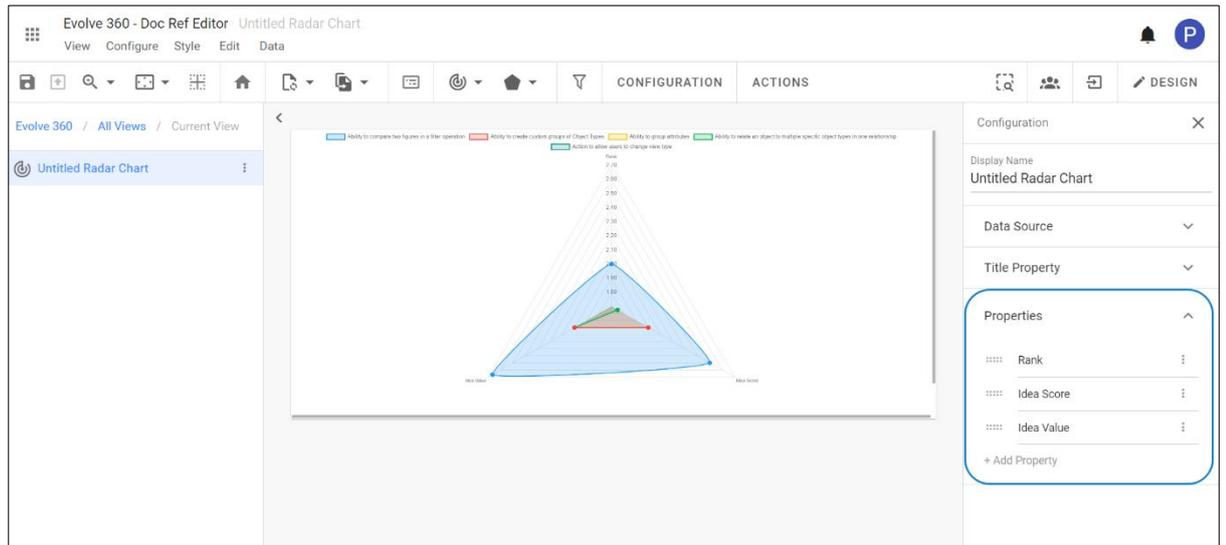
ℹ Multiple properties can be added to compare the attributes between them. And the **Property** selected must be numeric.

4. **Radar Chart** can be customized further.

- To apply the Radar Fill as **Opaque** or **Transparent,** click on ⬠ ▼ from the toolbar.

- To apply the chart type as **Analyze Elements** or **Analyze Attributes,** click on ◎ ▼ from the toolbar.

Scatter Chart

Scatter Chart helps to visualize trends between two datasets.

To create a **Scatter Chart**:

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. Select **Scatter Chart** from the list.
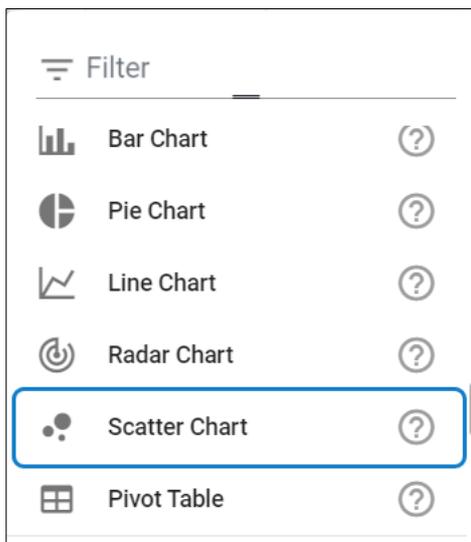
3. To Configure the **Scatter Chart,**

   - Click on **Configuration** on the toolbar or right-click on the view to select.
   - Select **Data Source,** either **Element Type** for a new one or **Filter**.
   - Set **Limit** to display if needed.
   - Applying **X** and **Y Axis Properties** is must to configure the **Scatter Chart**.
   - Click **Preview** to see the result.
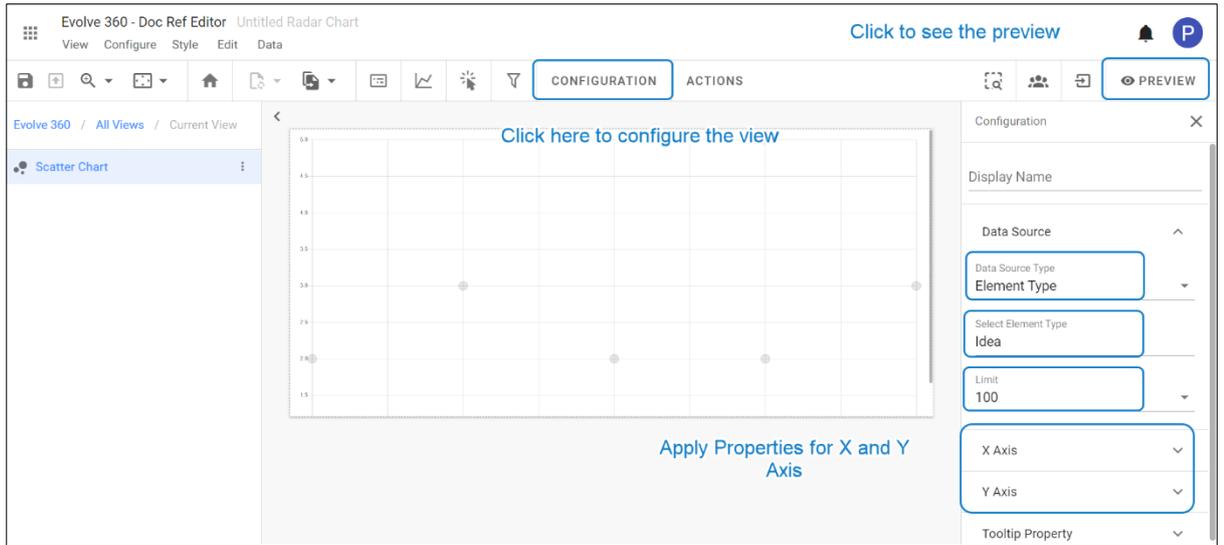
4. To add properties on **X** and **Y Axis**.

- Click on **X Axis** > Select **Data Source** > **Property.**
- Click on **Y Axis** > Select **Data Source** > **Property.**

5. The preview of the configured **Scatter Chart** is shown in the picture below with the properties.
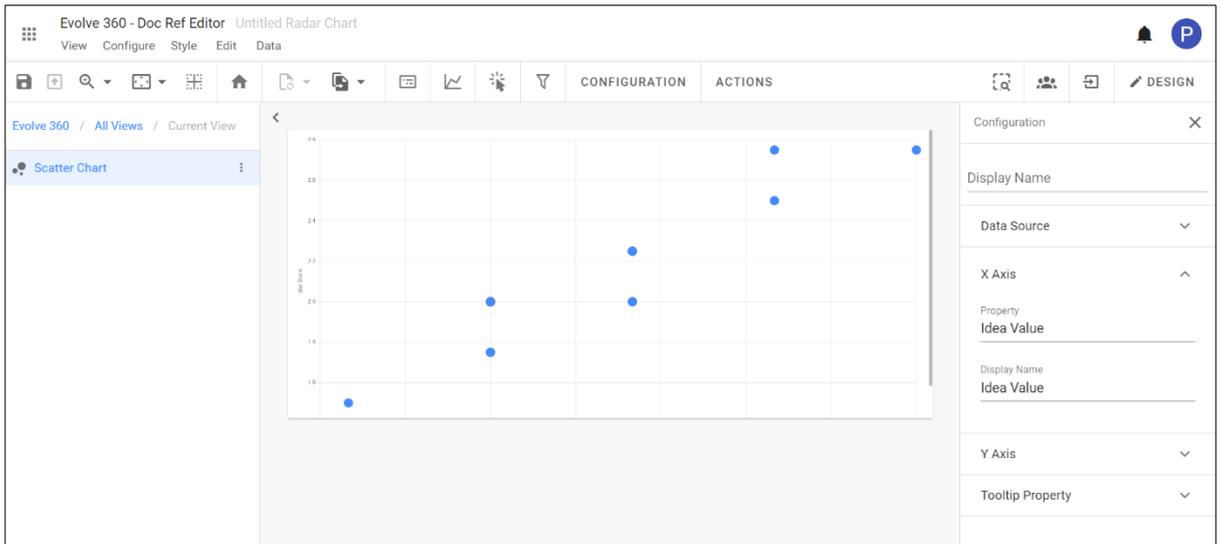
**i** | **Properties** selected must be numeric.

6. To set the **origin** to **Zero** or the **start of the dataset**, click on icons [icon] and [icon] respectively.

Pivot Table

A Pivot Table allows you to extract the significance from a large, detailed data set.

To create a **Pivot Table**:

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. Select **Pivot Table** from the list.
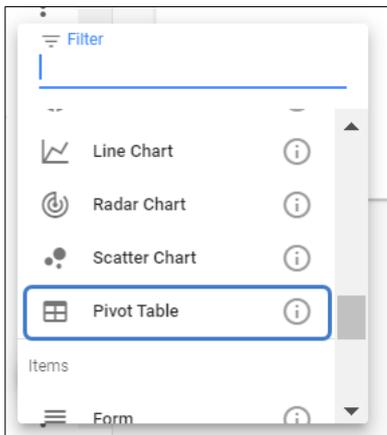
3. Click on **Configuration** on the toolbar or right-click on the view to select.
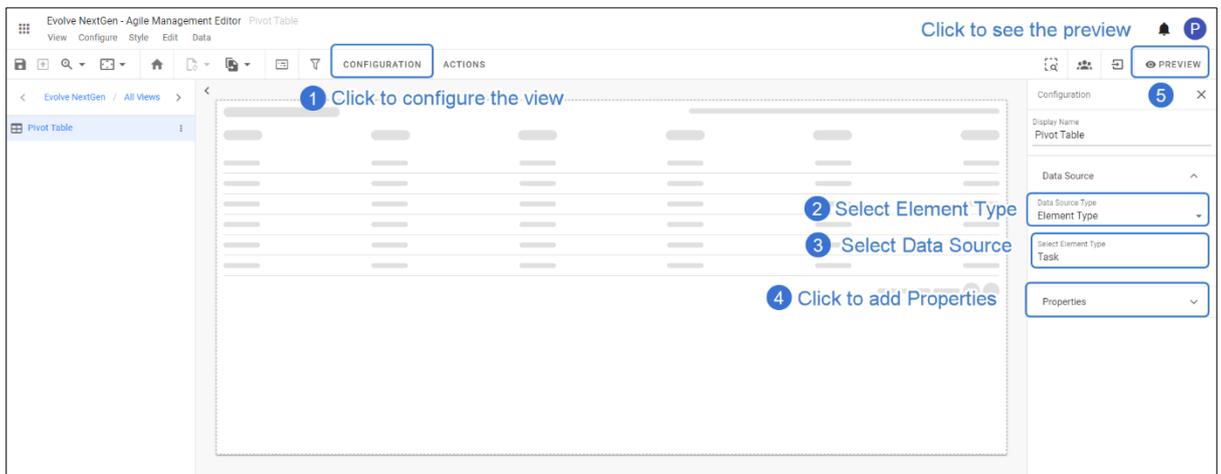
4. After **Configuration**, click on **Preview** placed on the top right corner to see your configured **Pivot Table.**

Item Views

Items Views help to see the specific information by highlighting what is important and let you interact at a granular level.

Item Views are typically applied to the Object Type Views where they work when taking the context from a single source. Also, they can be configured with any layout to display the specific information in different views.

The available **Item Views** are:

1. Forms
2. Property Card
3. Property Pie Chart
4. Property Radar Chart
5. Property Comparison
6. Property Display
7. Comments
8. Attachments

Form

**Forms** are a basic way of displaying and editing properties of an object instance of data, used to display and edit the properties.

To create a **Form:**

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. As the **Form** works like an **Object Type View** which returns the context from a single source. or
   A **Column layout** is chosen for an instance with a **List View** in the first column.
3. To add **Form** in the second column,
   Click **Add Content** > **Add New View** > Select **Form**.
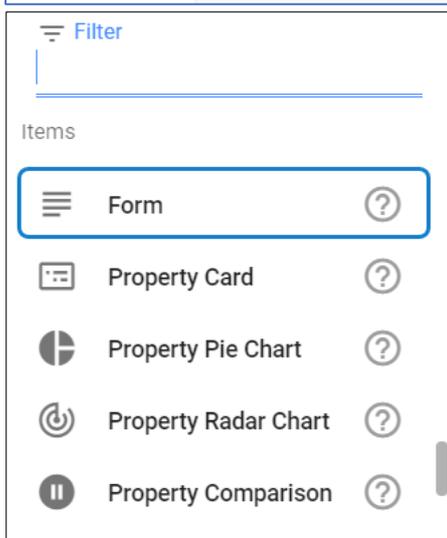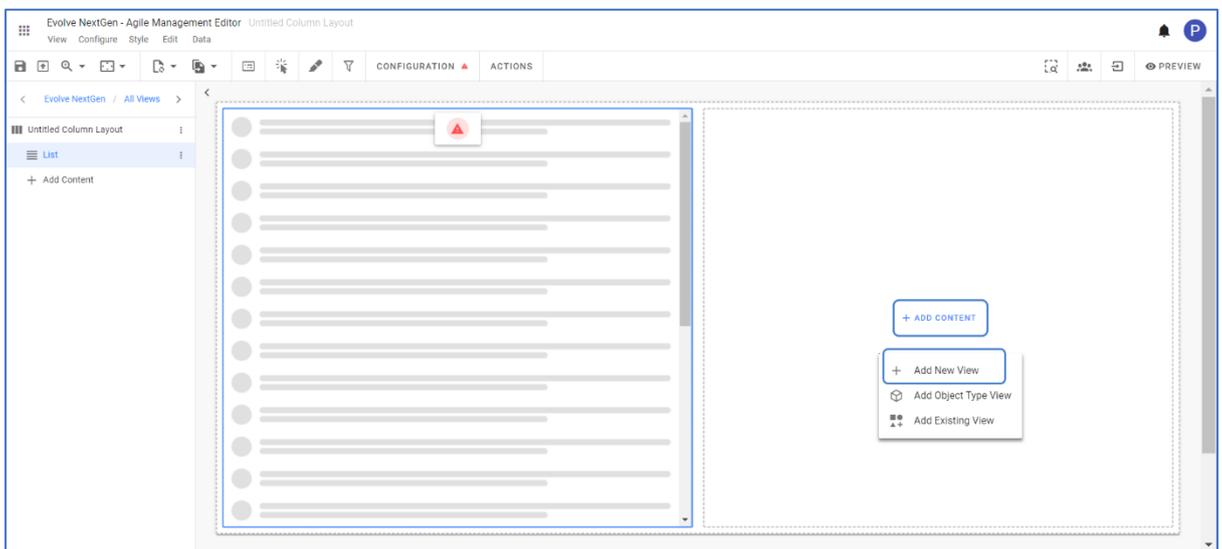
4. To pass the context from the source,

- Click on the title of the layout and then **Configuration** from the toolbar.
- Click **Column 2.**
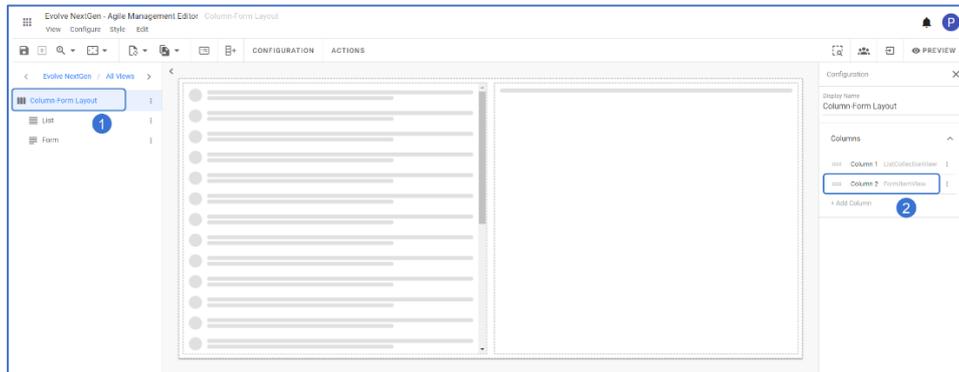
- Click **Context Source** > **Select Internal** > **Apply Changes.**

5. To add the Properties to the **Form,** click on **Configuration** from the toolbar or right-click on the view.

Click **Add Property** > Select **Property.**

Select the checkbox **Editable** if you wish to edit the property in the Form.

Click on **Apply Changes.**

Note: Multiple properties can be added to the **Form.**
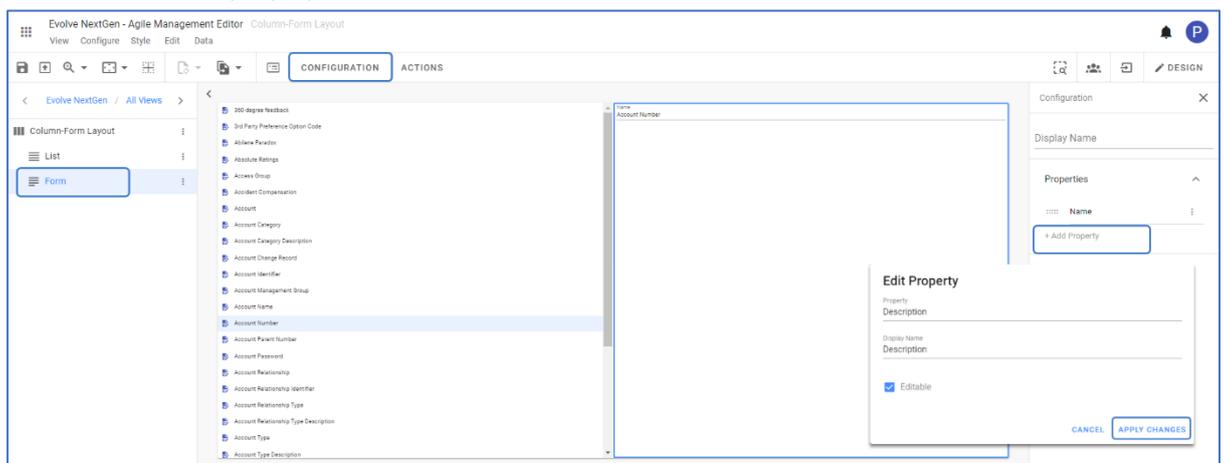
Property Card

Property Cards are a way of displaying and interacting with individual pieces of data.

To create a **Property Card:**

1. Click on **All Views** in the editor and then click on ![+] icon placed at the bottom of the list of views.
2. As the **Property Card** works like an **Object Type View** which returns the context from a single source.

   For an instance, a **Row layout** is chosen, and configure a **List View** in the first row.
3. To add **Property Card** in the second row,

   Click **Add Content** > **Add New View** > Select **Property Card.**
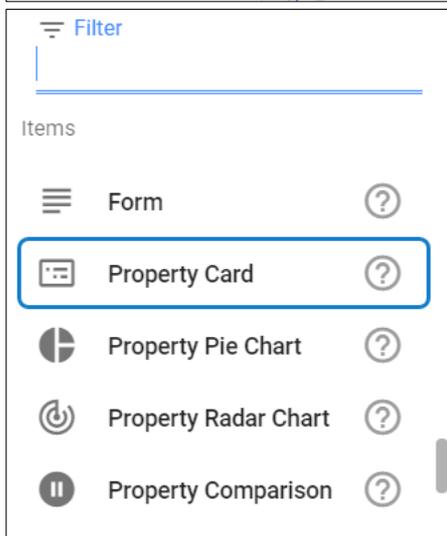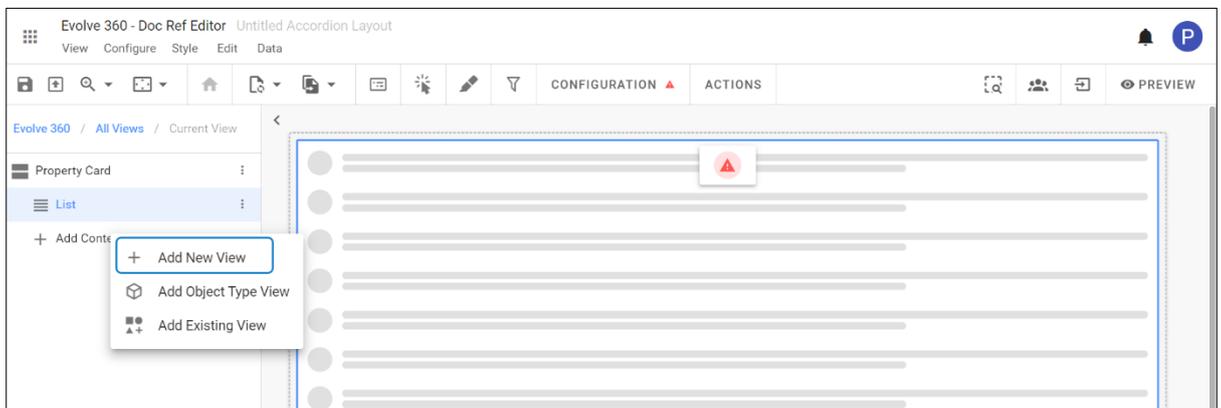
4. To pass the context from the source,
   - Click on the title of the layout and then **Configuration** from the toolbar.
   - Click **Row 2.**
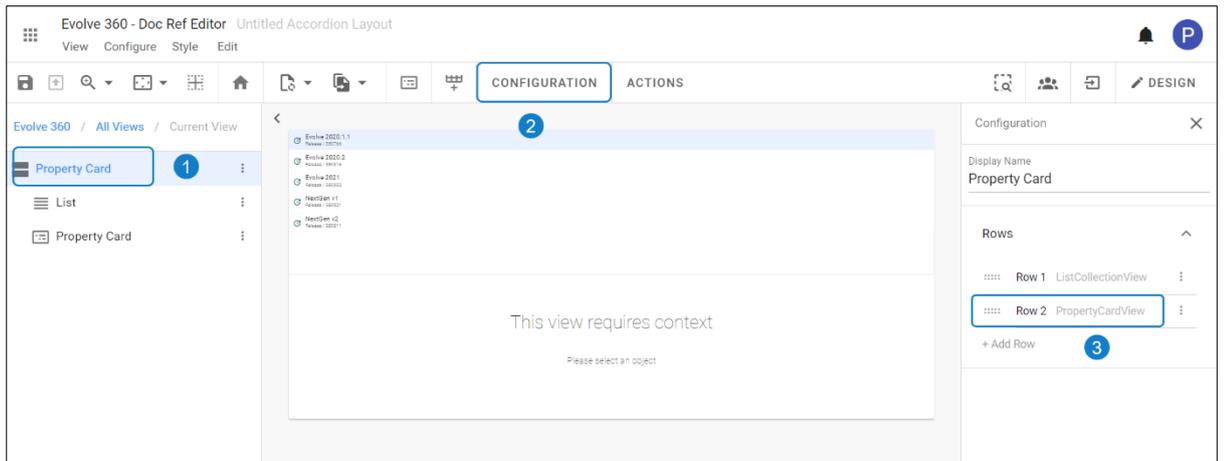
- Click **Context Source** > **Select Internal** > **Apply Changes.**
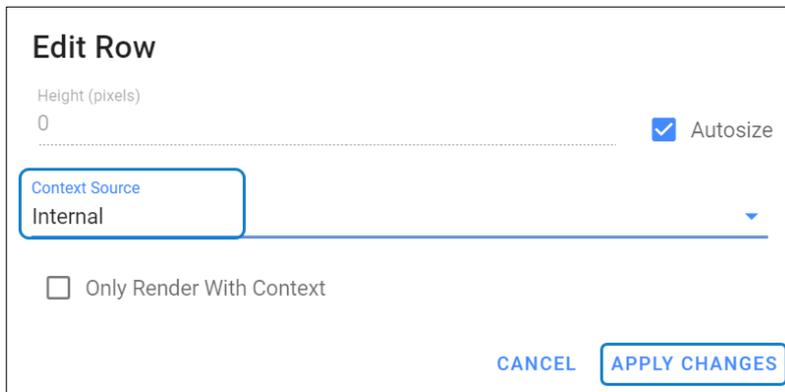
> ℹ️ The height of the **Row** can be adjusted manually by disabling Autosize and then enter the value in the field.

5. The **Preview** of the configured **Property Card** is shown in the picture below.
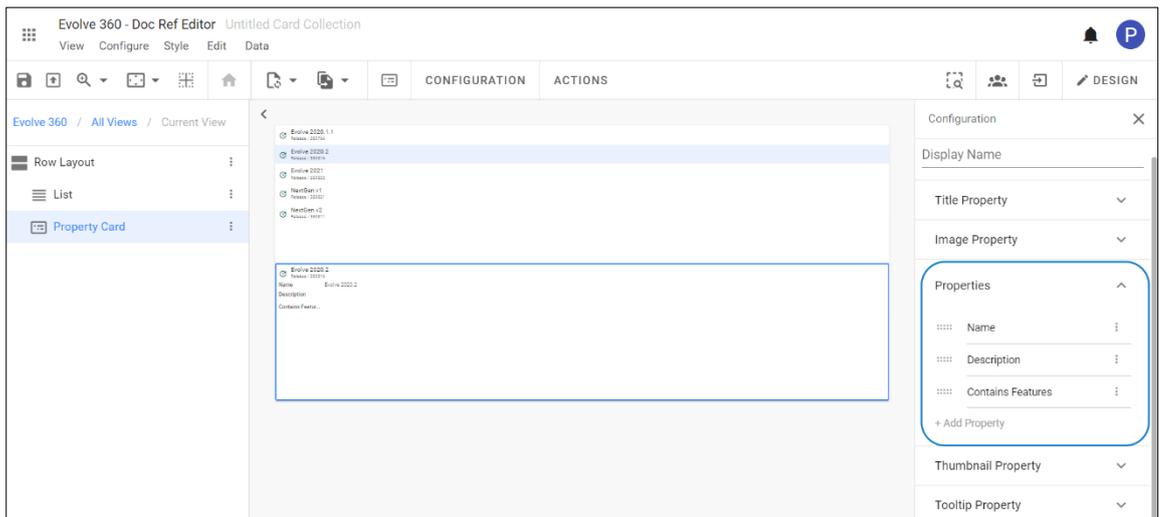
By default, the property is set with **Name**. You can add the additional properties to the card by **Add Property** for the new one.

Property Pie Chart

Pie charts help to visualize proportions between attributes.

To create a **Property Pie Chart View:**

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. As the **Property Pie Chart** works like an **Object Type View** which returns the context from a single source.

   For an instance, a **Column layout** is chosen, and configure a **List View** in the first column.
3. To add **Property Pie Chart** in the second column,

   Click **Add Content** > **Add New View** > Select **Property Pie Chart.**
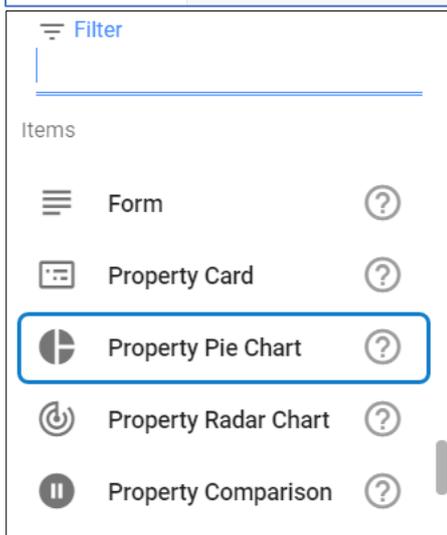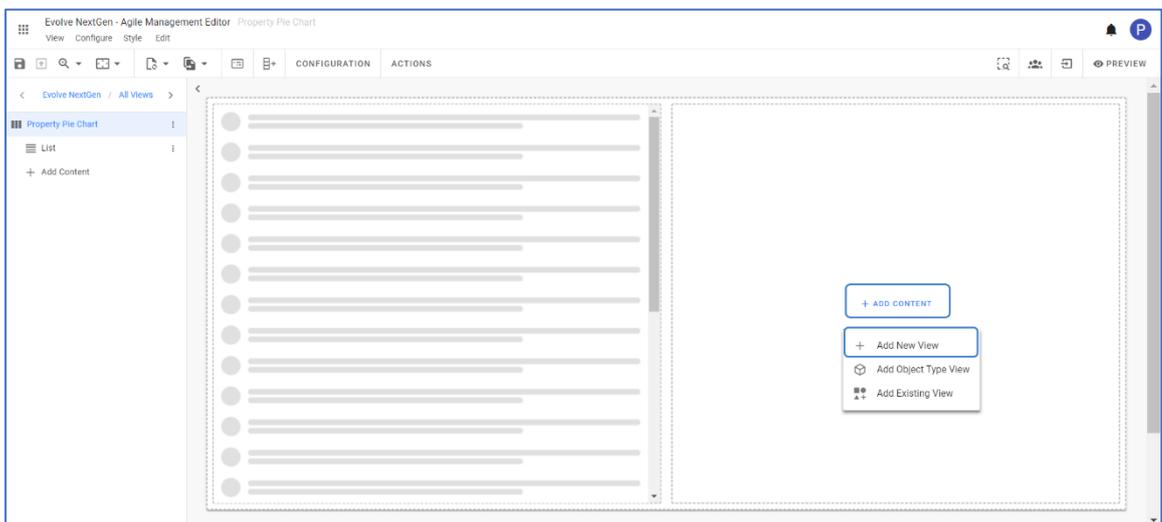
4. To pass the context from the source,
   - Click on the title of the layout and then **Configuration** from the toolbar.

- Click **Column 2.**
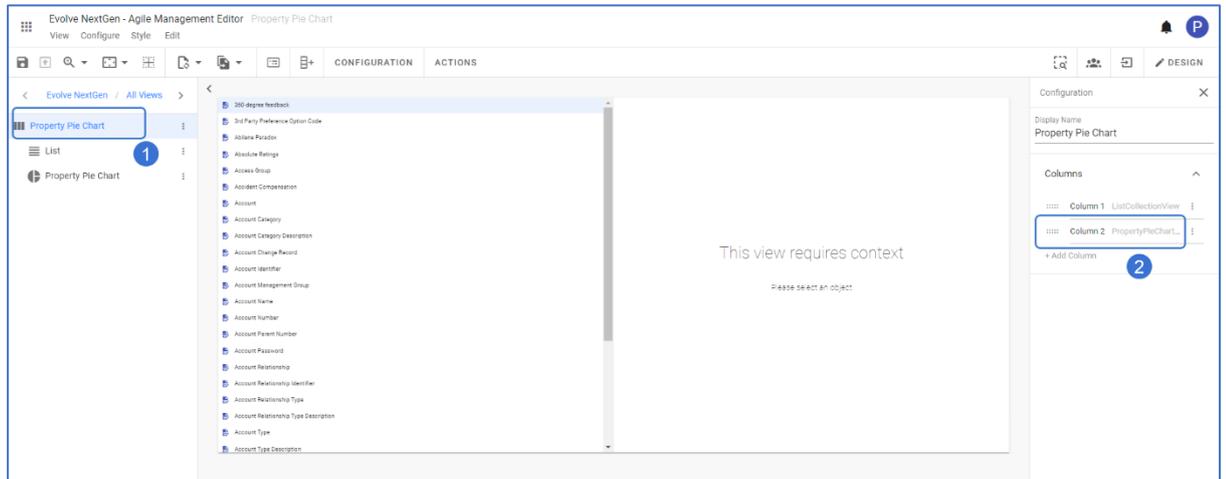
- Click **Context Source** > **Select Internal** > **Apply Changes.**
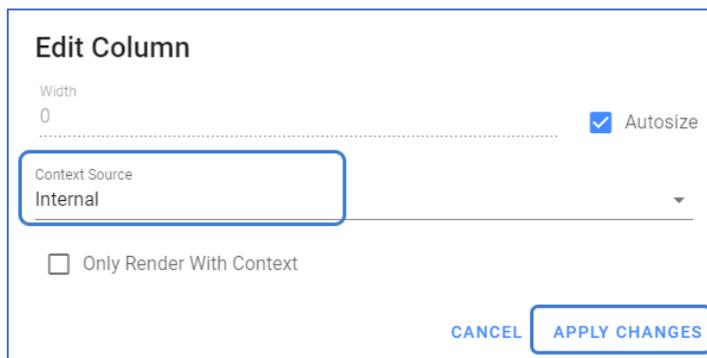
5. To configure the **Property Pie Chart,** click on Configuration from the toolbar or right-click on the view.

   By default, the property is set with **Name**. Edit the property or click **Add Property** for the new one.
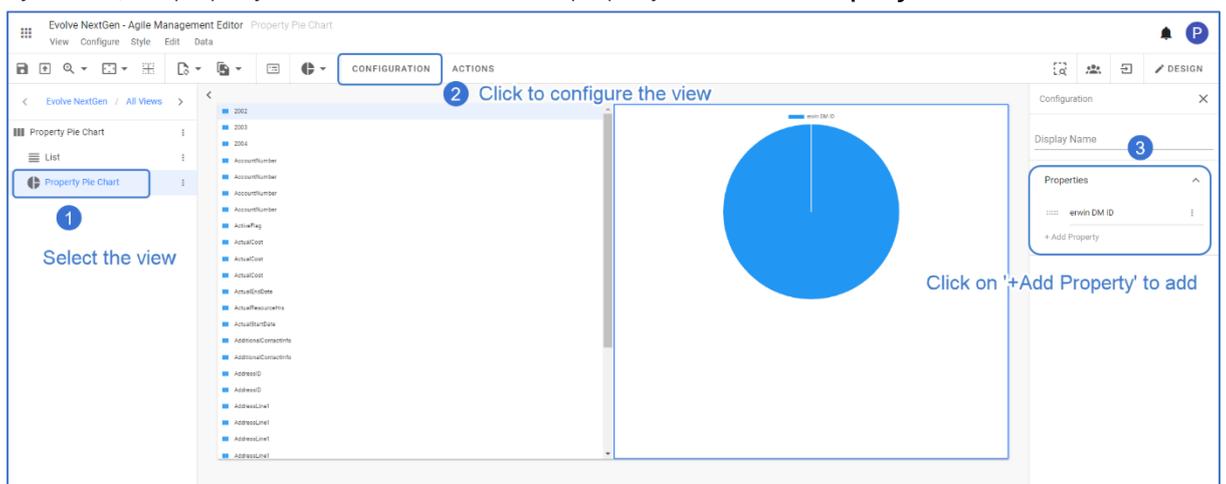
6. The **Preview** of the configured **Property Pie Chart** is shown in the picture below.
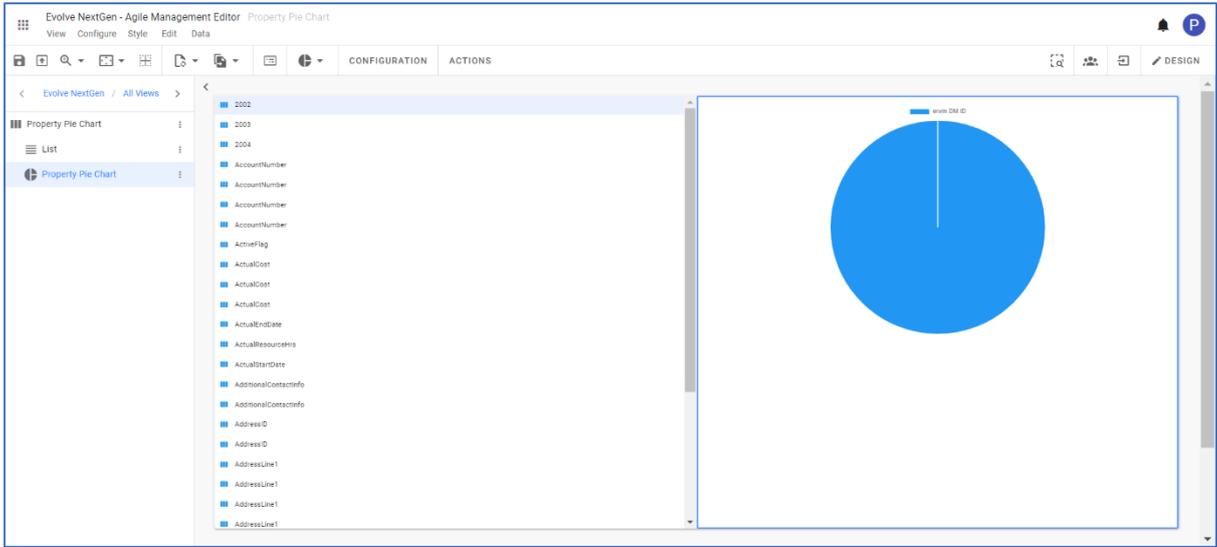
Property Radar Chart

Property Radar Chart is useful for comparing multiple numeric attributes.

To create a **Property Radar Chart View:**

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. As the **Property Radar Chart** works like an **Object Type View** which returns the context from a single source.

    For an instance, a **Column layout** is chosen, and configure a **List View** in the first column.
3. To add **Property Radar Chart** in the second column,

    Click **Add Content** > **Add New View** > Select **Property Radar Chart.**
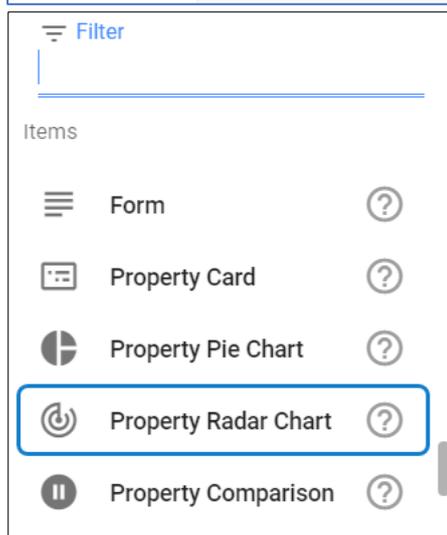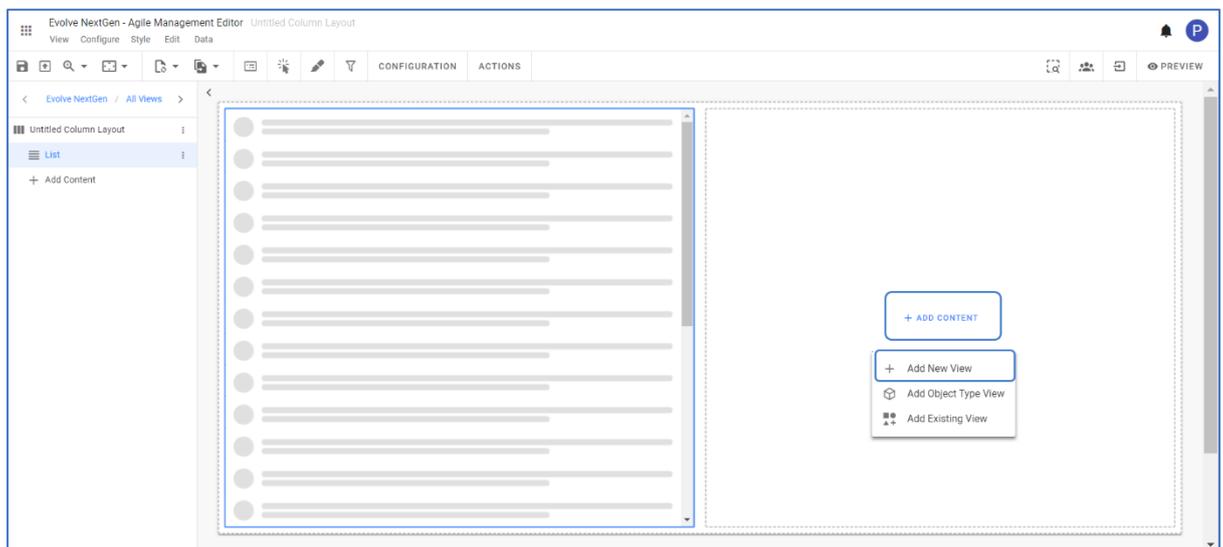
4. To pass the context from the source,

- Click on the title of the layout and then **Configuration** from the toolbar.
- Click **Column 2.**
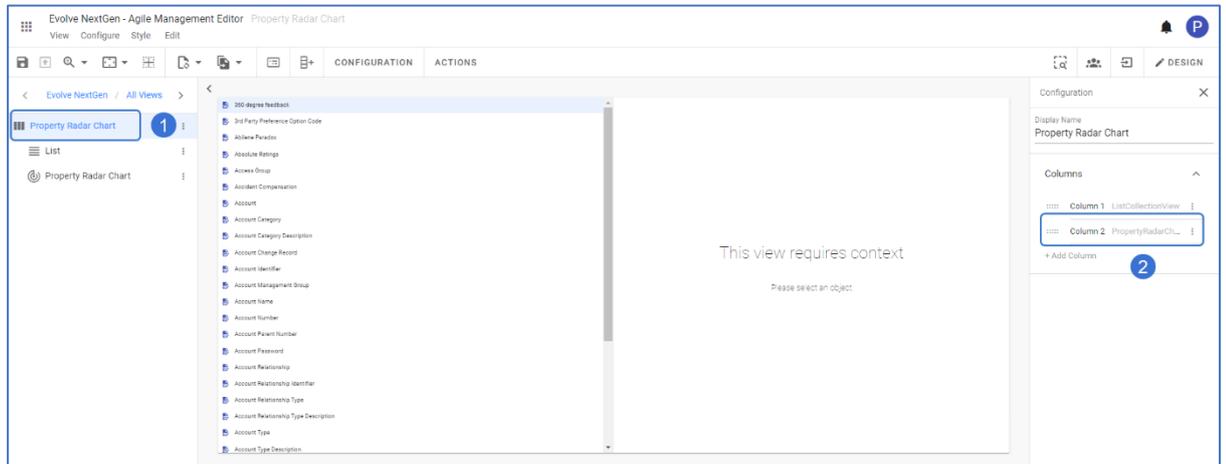
- Click **Context Source** > **Select Internal** > **Apply Changes.**
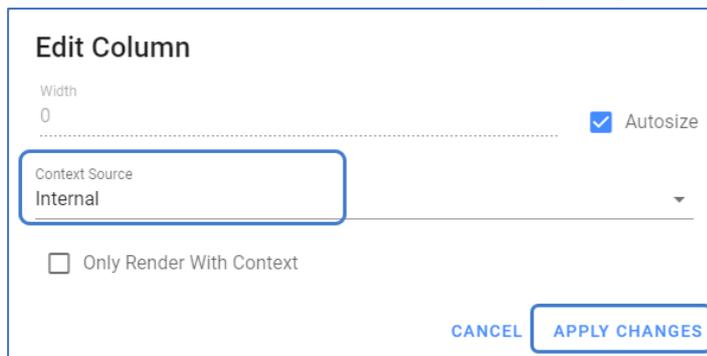
5. Attributes need to be added to complete the view.

To configure the **Property radar Chart,** click on Configuration from the toolbar or right-click on the view.

By default, the property is set with **Name**. Edit the property or click **Add Property** for the new one.

Note: Properties added must be numeric.
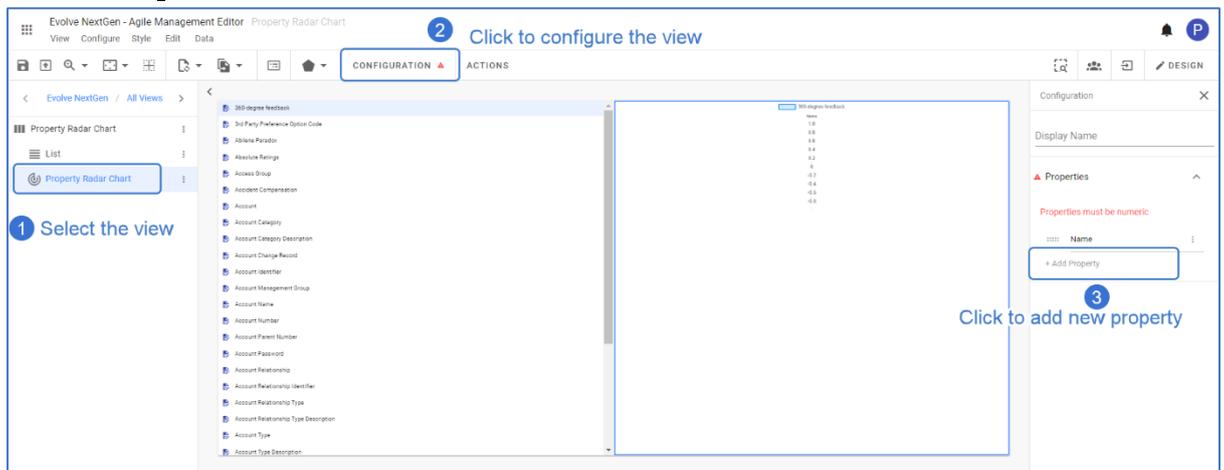
6. The **Preview** of the **Property Radar Chart** with three defined properties.
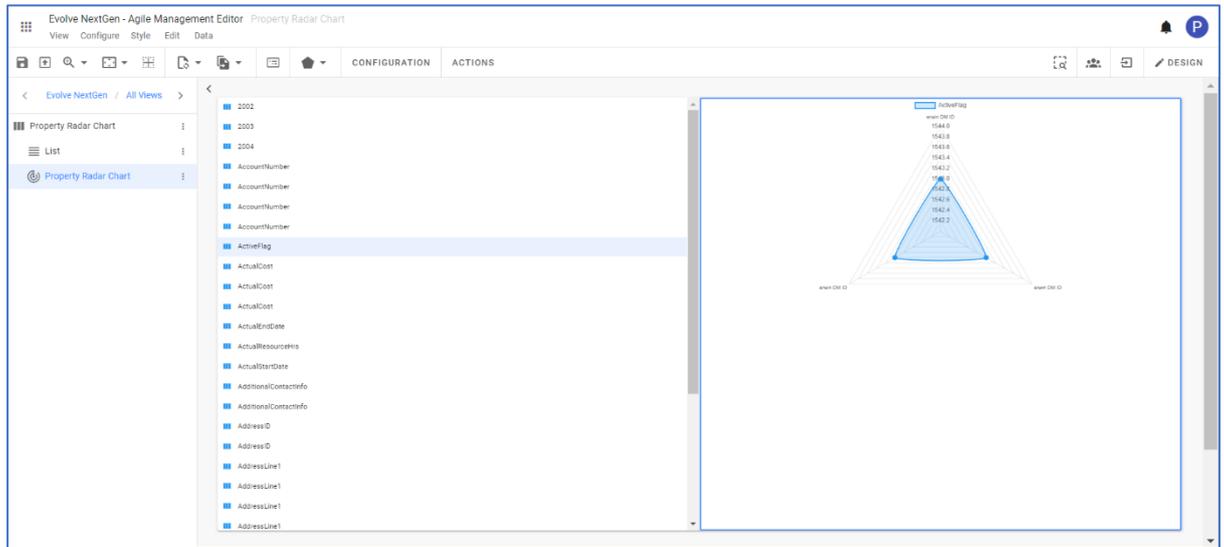
Property Comparison

**Property Comparison** helps to compare two attributes or metrics in a card.

To create a **Property Comparison View:**

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. As the **Property Comparison** works like an Object Type View, which returns the value of the two attributes in a single instance.
   A **Column layout** is chosen for an instance and a **List View** in the first column.
3. To add **Property Comparison** in the second column,
   Click **Add Content** > **Add New View** > Select **Property Comparison.**
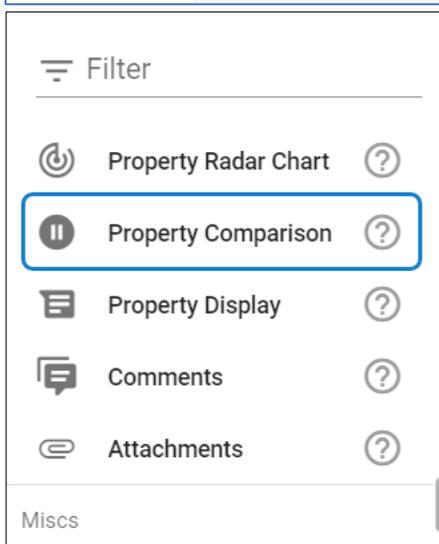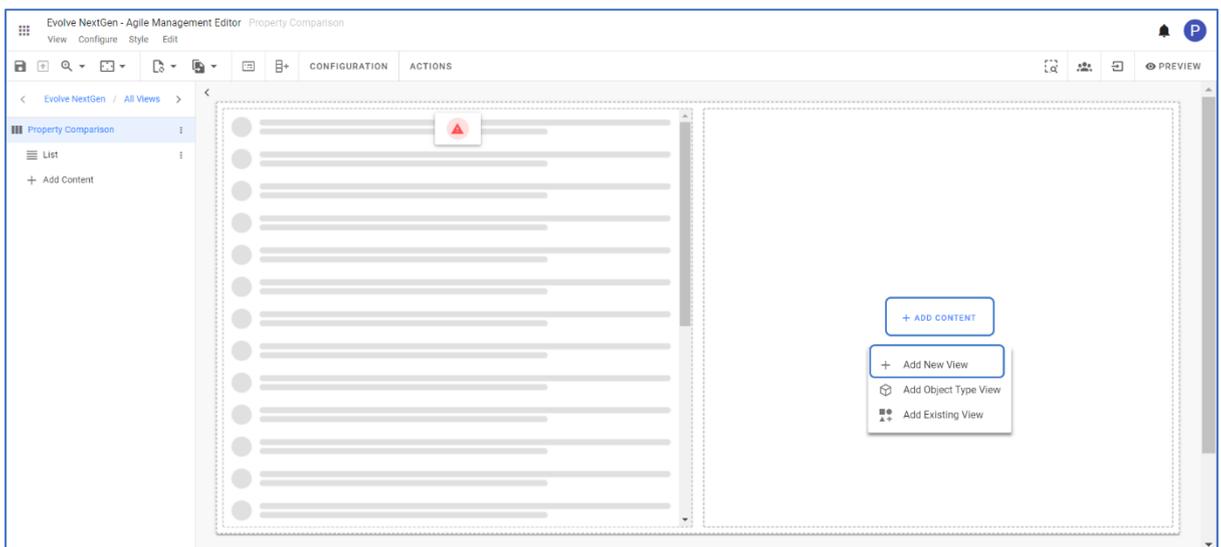
4. To pass the context from the source,

- Click on the title of the layout and then **Configuration** from the toolbar.
- Click **Column 2.**
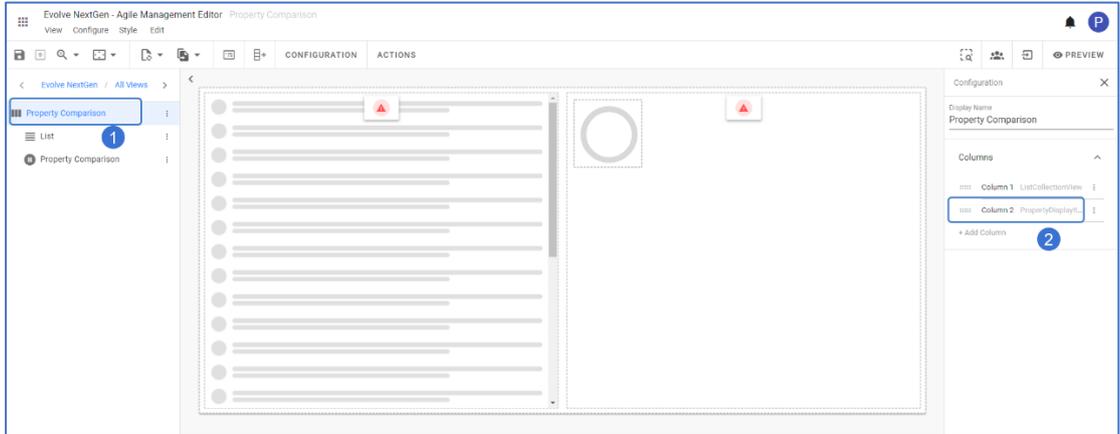
- Click **Context Source** > **Select Internal** > **Apply Changes.**

5. To configure the **Count Comparison**, click on **Configuration** on the toolbar or right-click on the view.

Select the **Property** for both **Numerator** and **Denominator** to see the compared attribute values.
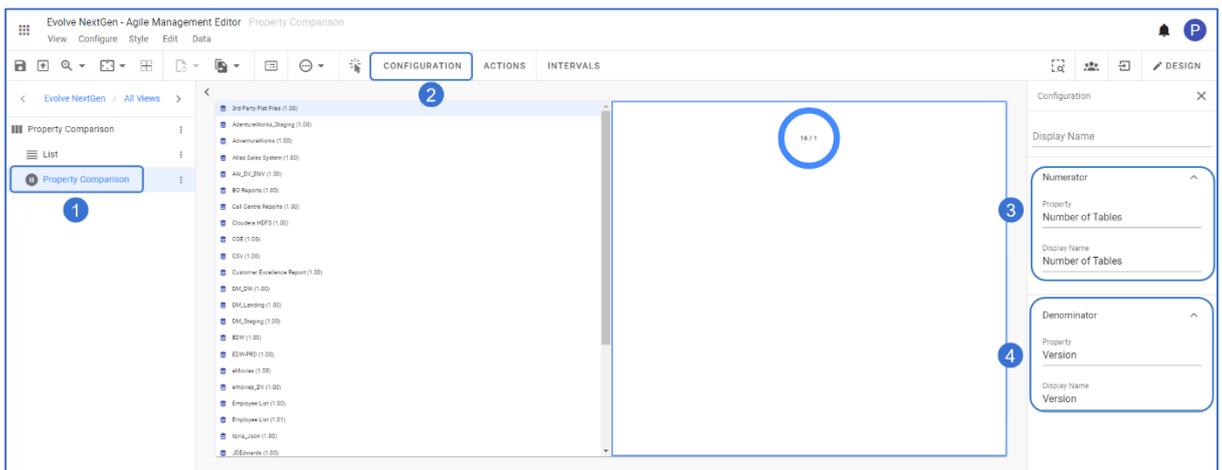
Property Display

Property Display highlight a specific piece of information or a metric in a card.

In simple words, it displays the single property of the object.

To create a **Property Display View:**

1. Click on **All Views** in the editor and then click on ⊕ icon placed at the bottom of the list of views.
2. As the **Property Display** works like an Object Type View which returns the context from a single source.

    A **Column layout** is chosen for an instance and a **List View** in the first column.
3. To add **Property Display** in the second column,

    Click **Add Content** > **Add New View** > Select **Property Display.**
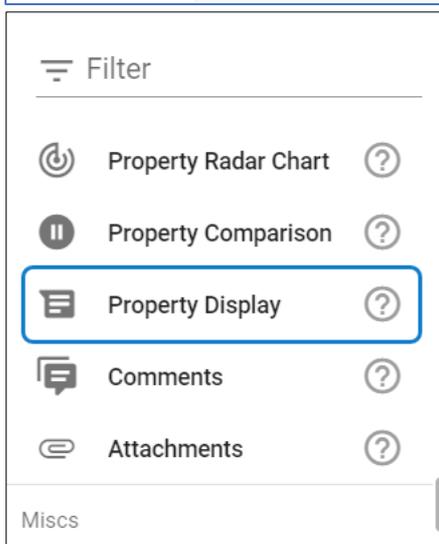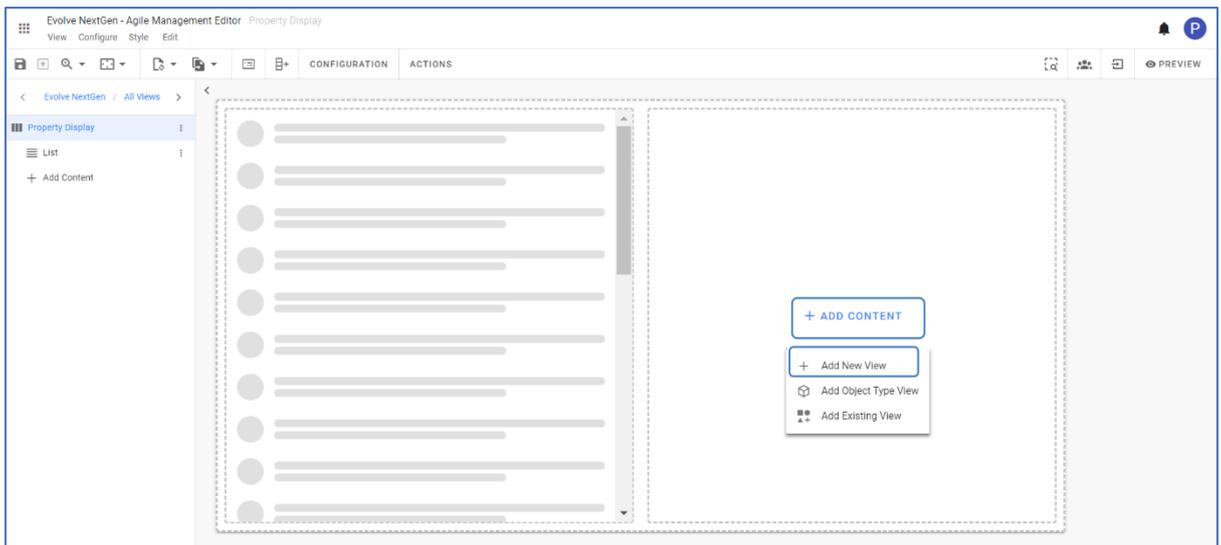
4. To pass the context from the source,
   - Click on the title of the layout and then **Configuration** from the toolbar.
   - Click **Column 2.**
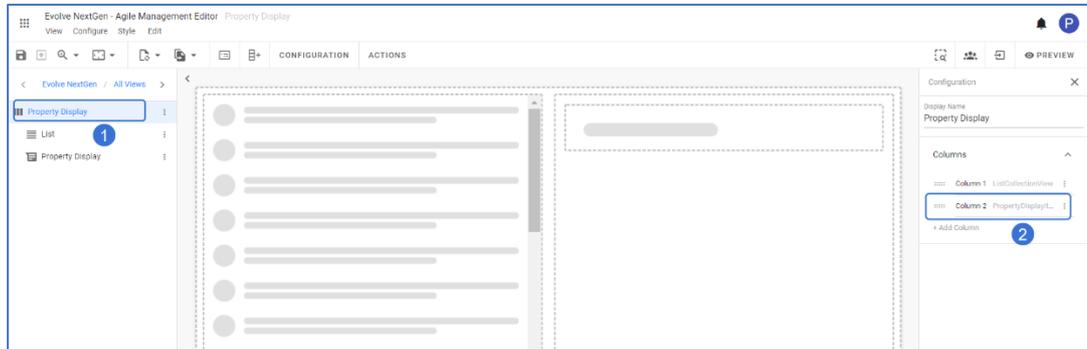
   - Click **Context Source** > **Select Internal** > **Apply Changes.**
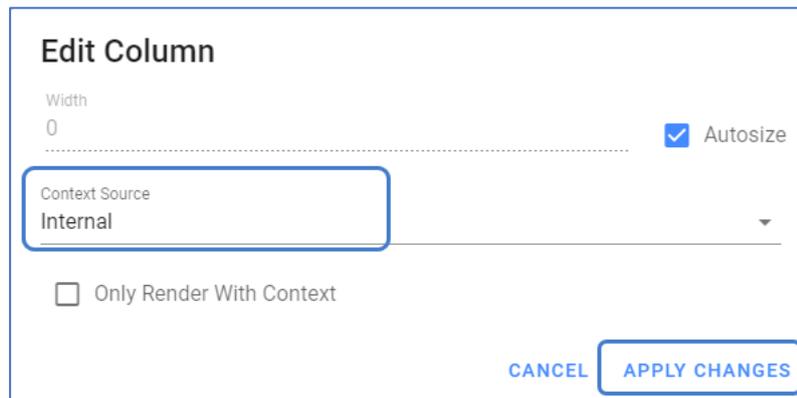
5. Click on **Configuration** of **Property Display** and select the property you wish to display.
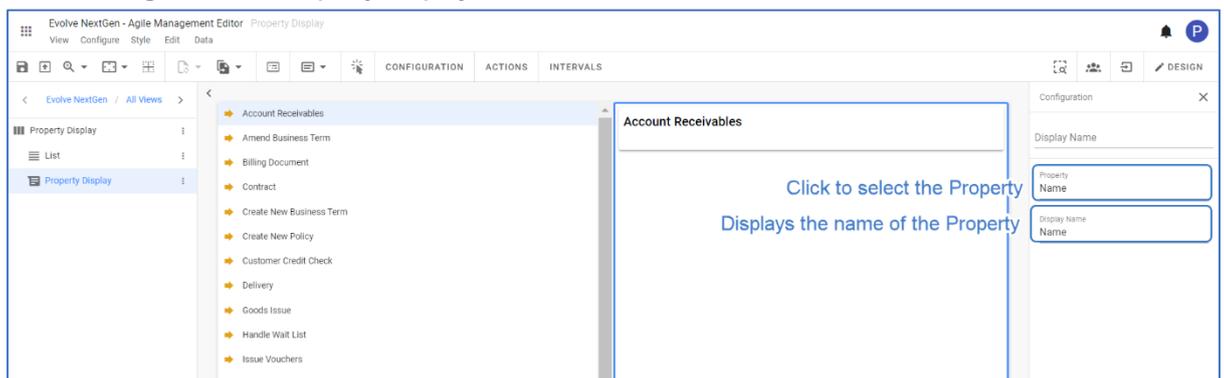
Comments

Comments allow users to easily discuss within the context of a specific element.

To create a **Comments View:**

1. Click on **All Views** in the editor and then click on [+] icon placed at the bottom of the list of views.
2. **Comments** works like an **Object Type View** which returns the context from a single source.
   Consider any layout. For instance, chose a **Column Layout** and configure a **List View** in the first column.
3. To add **Comments** in the second Column,
   Click **Add Content** > **Add New View** > Select **Comments.**
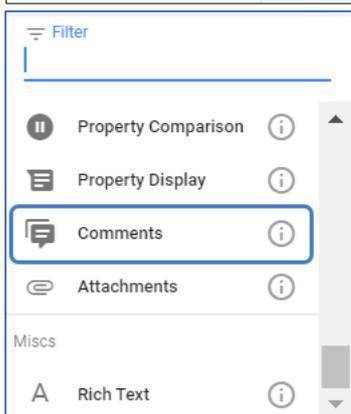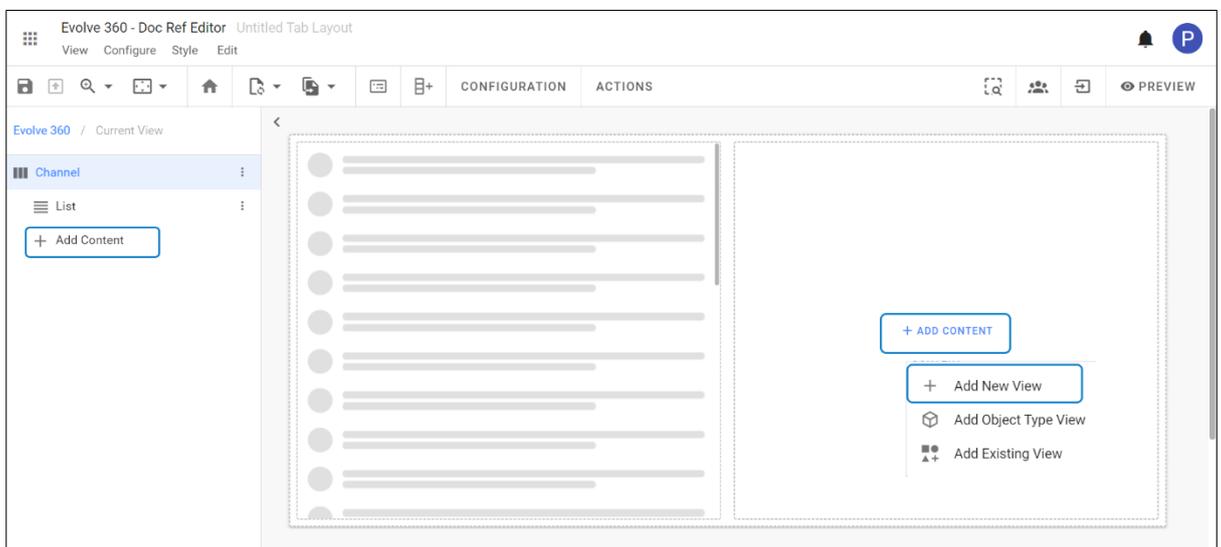
4. To pass the context from the source,
   - Click on the title of the layout and then **Configuration** from the toolbar.
   - Click **Column 2.**
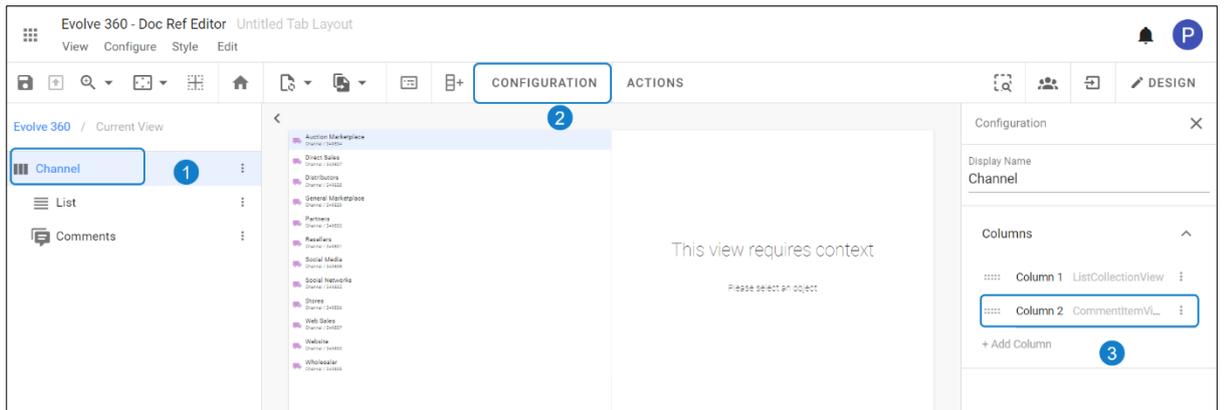
- Click **Context Source** > **Select Internal** > **Apply Changes.**
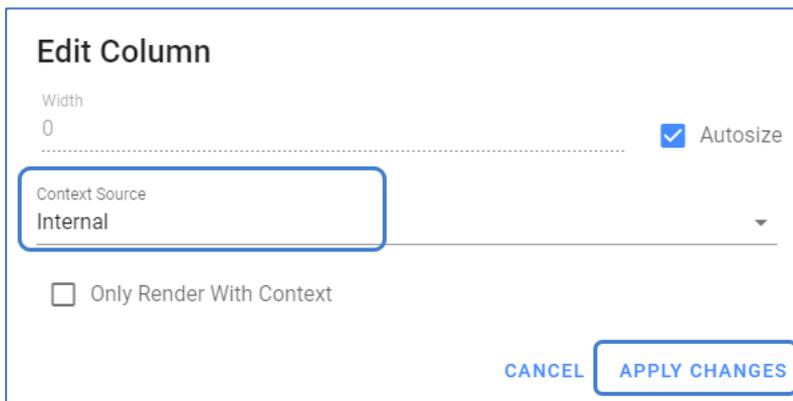
5. The **Preview** of the configured **Comments** is shown in the picture below.
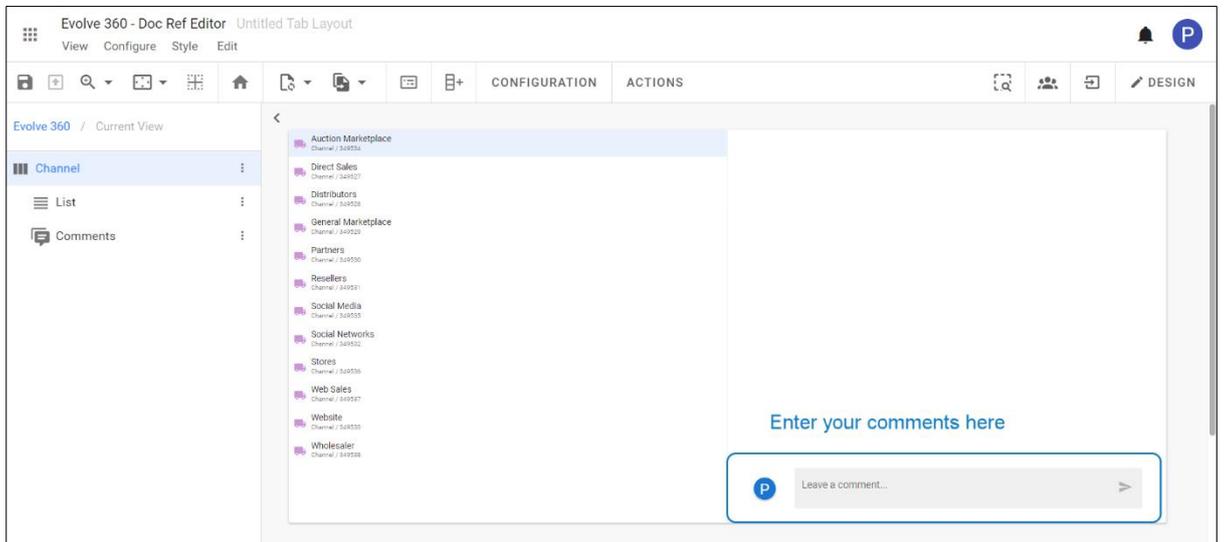
Attachments

Attachments allow file sharing in a specific context.

To create an **Attachments View:**

1. Click on **All Views** in the editor and then click on icon placed at the bottom of the list of views.
2. **Attachments** works like an **Object Type View** which returns the context from a single source. Consider any layout. For instance, chose a **Column Layout** and configure a **List View** in the first column.
3. To add **Comments** in the second Column,
   Click **Add Content** > **Add New View** > Select **Comments.**
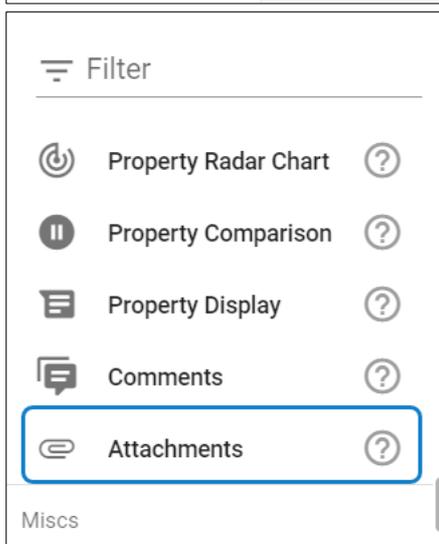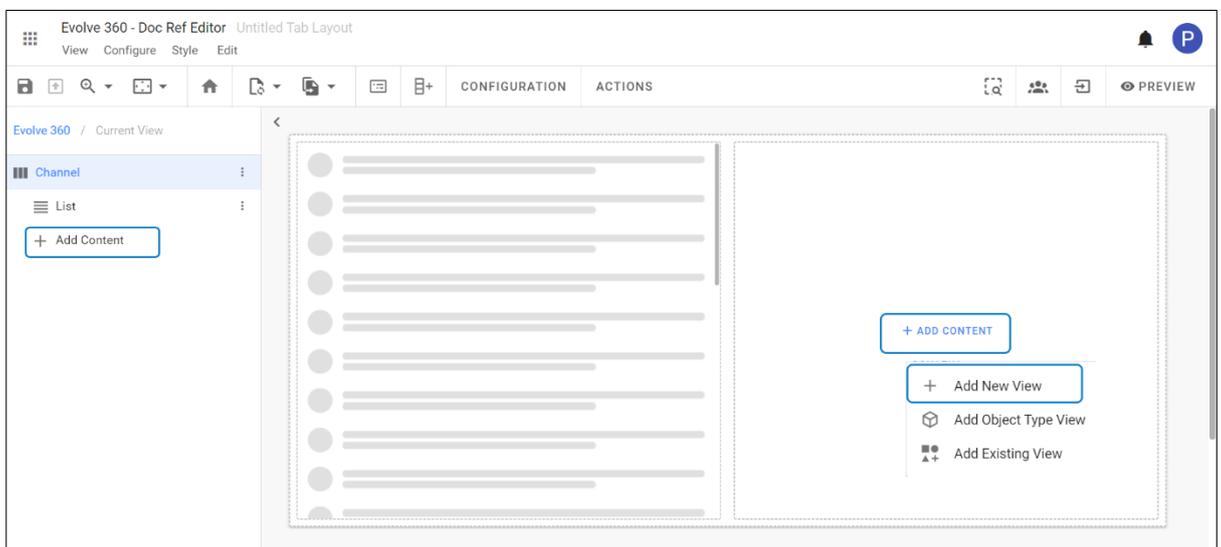
4. To pass the context from the source,

- Click on the title of the layout and then **Configuration** from the toolbar.
- Click **Column 2.**
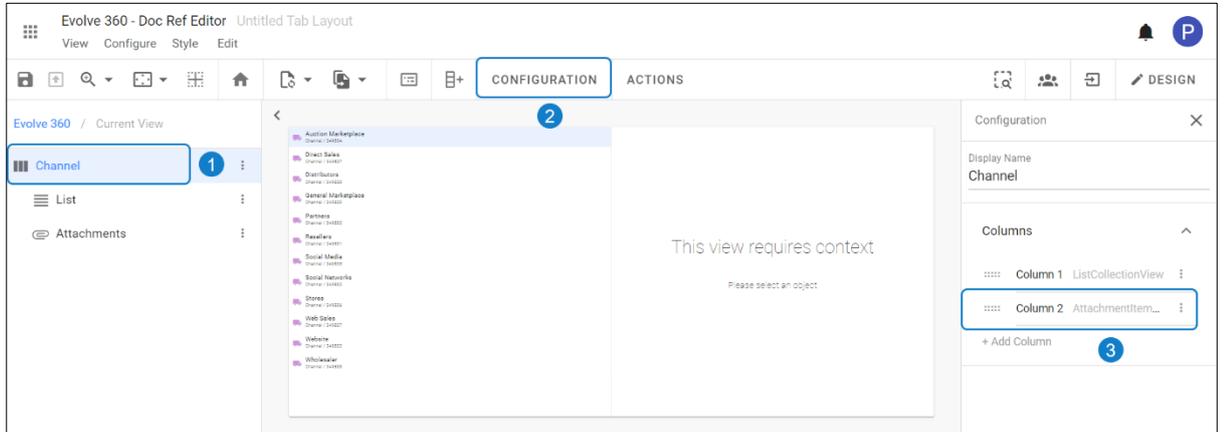
- Click **Context Source** > **Select Internal** > **Apply Changes.**

5. To add Attachments to the view
   - Click on + **Add Attachments.**
   - Enter **Name, Description** and **Upload File**.
   - Click on **Add**.
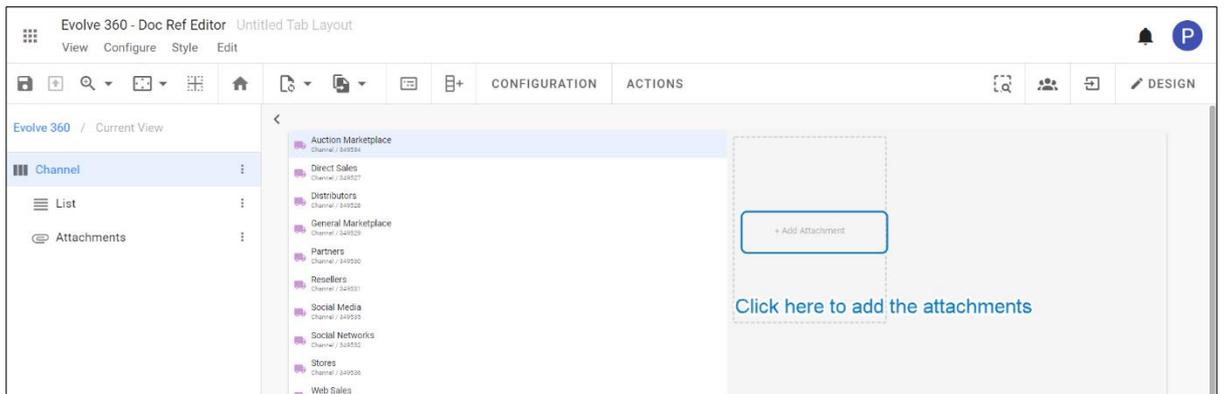
6. The Preview of the **Attachments** is shown in the picture below.

The **Attachments** are stored against an object instance

You can **Edit, Delete** the uploaded **Attachment,** and can **Add** the new one.

Miscs
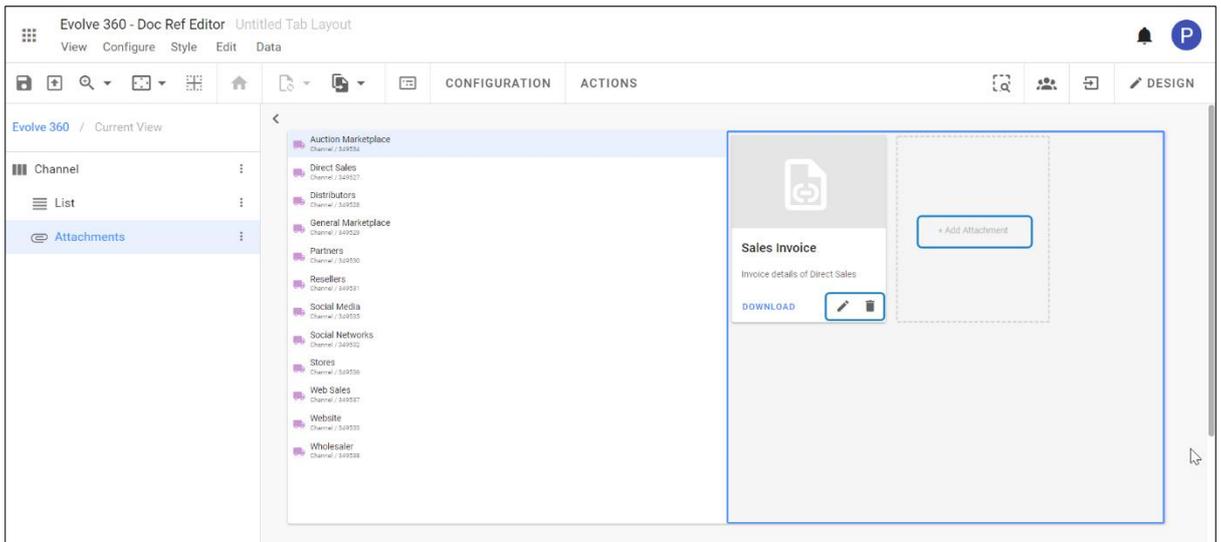
Rich Text

Rich text is used to create the information pages with the help of the built-in editor.

Rich Text works along with any layout.

To configure the Rich Text,

1. Choose **Rich Text** view type in any layout you wish.
2. Click on **Edit Text** on the toolbar, this opens the text editor.
   - Write the text in the space and can customize the text as you do in the word editor.
   - You can add **Links**, **Images** and can construct the **Table** by defining rows and columns.
   - When you finish with the editing, click on **Apply Changes**.
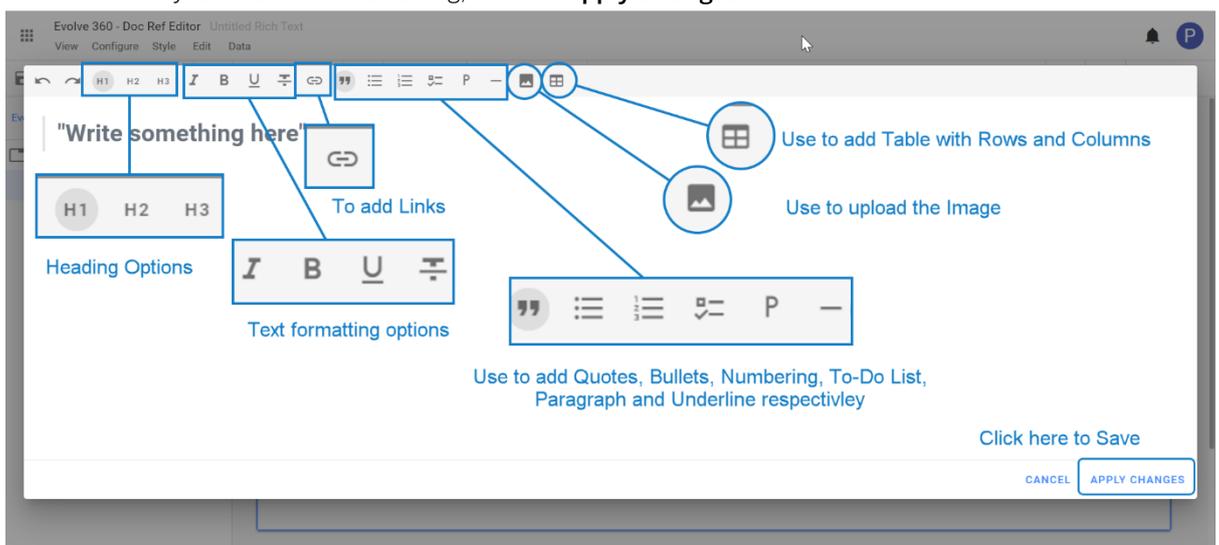
Image

Image View allows to upload the images for use in an application.

Image works along with any layout and the properties of the image can be configured with the individual view type too.

To configure the Image,

1. Choose **Image** view type in any layout you wish.
2. Click on **Configuration** on the toolbar, upload the **Image** on the right-hand side panel.
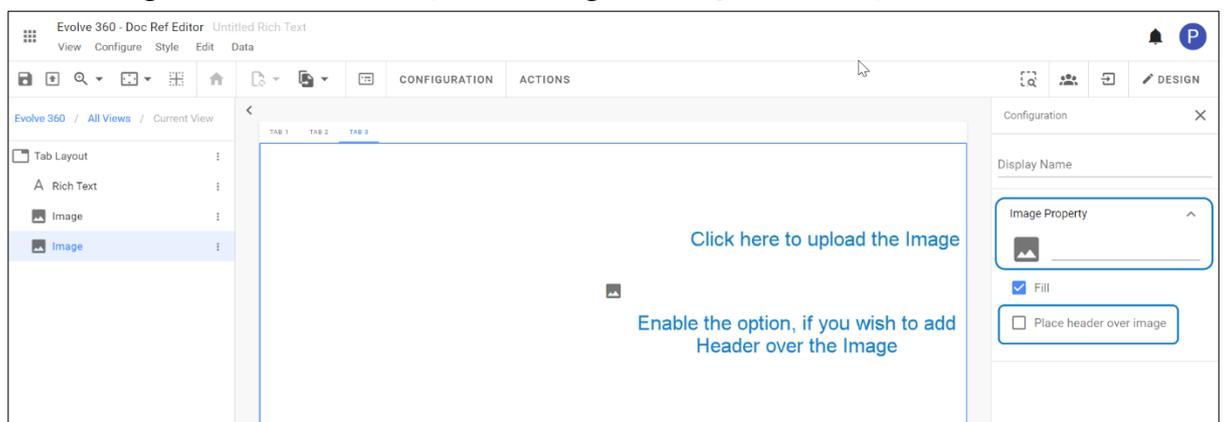
> **ℹ** | **Image** also available to add as the icon for the list of items, or in the properties of specific sources.

To add Object Type View

Object Type View helps to display the information rendered from the **Element Source Type.**

An example of configuring **Object Type View** in the **Column Layout:**

Go to **All Views** in the editor and choose the default **Column Layout**.

To add the content in the columns.

Click on + **Add Content** > **Add New View.**
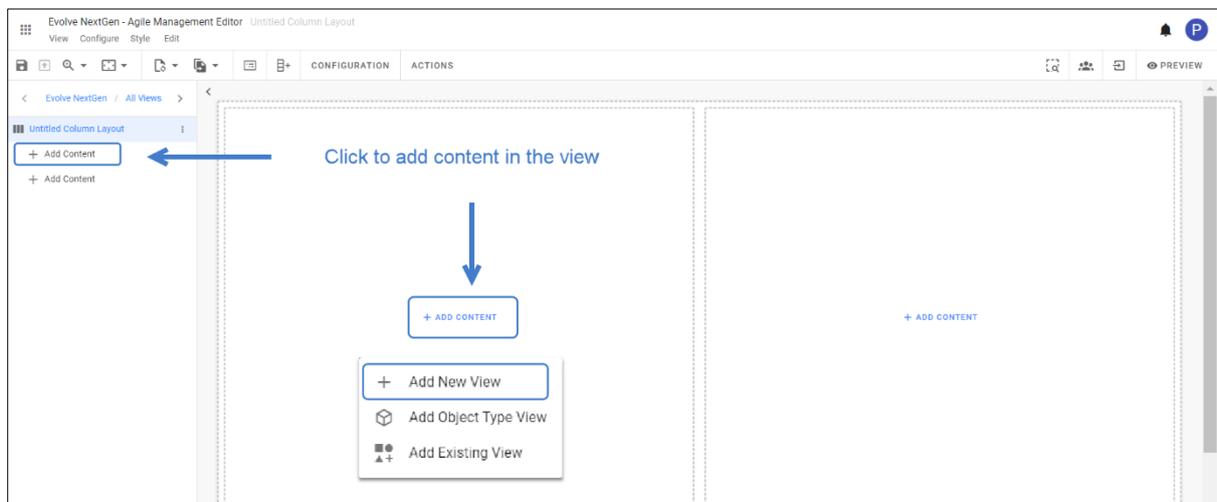
For instance, choose a **List** view in one column and its **Object Type View** in another column, as shown below.

Comes a Video.

To Configure the Views in columns,

1. Select the view to configure.
2. Click on **Configuration** on the toolbar or right-click on the view.
3. Select **Data Source Type.** E.g., Select **Element Type** from the list.
4. Select **Element Type.** E.g., Select **DIS Business Term.**
5. Click on **Preview** to see from the right upper corner of the page.
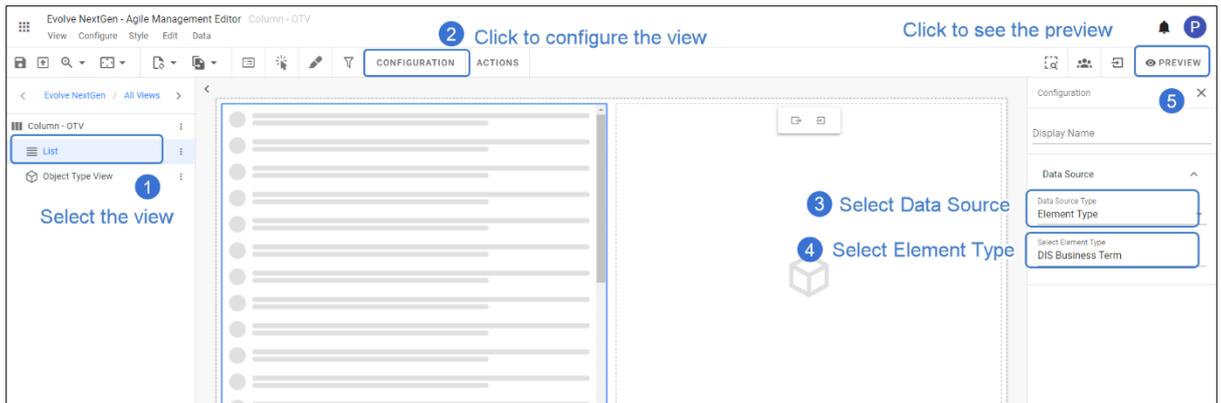
ℹ Warning Symbol before the **Configuration** represents that the view selected is incomplete and requires action.
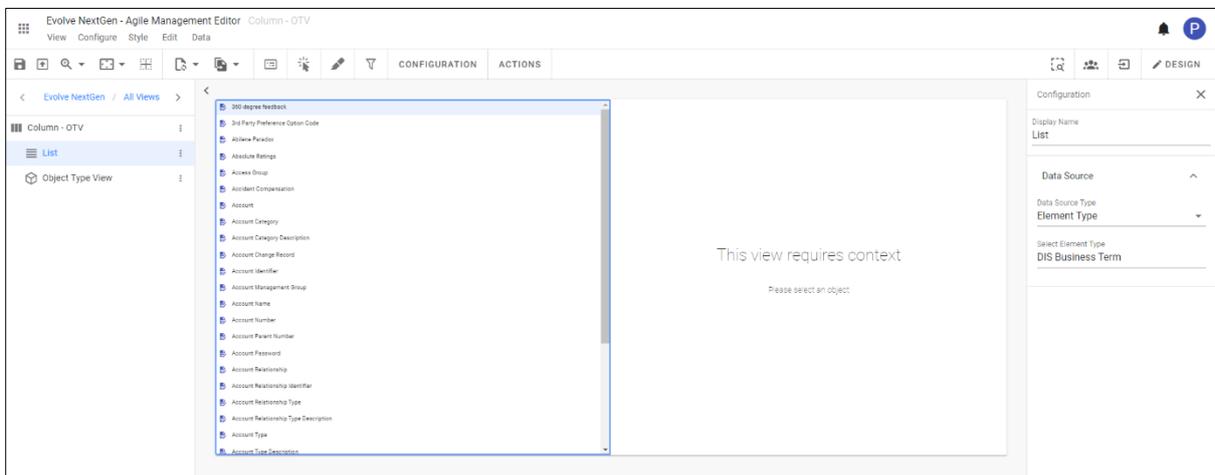
A column with **Object Type View** requires context, which must define the property such that the information will be rendered to display.

ℹ This action can be performed in the **Preview** mode or go back to the **Design** mode

To pass the context to the Object Type,

1. Click on the title of the Layout.
2. Click on **Configuration** on the toolbar or right-click on the view.
3. Click on **Column 2** from the right-side pane.
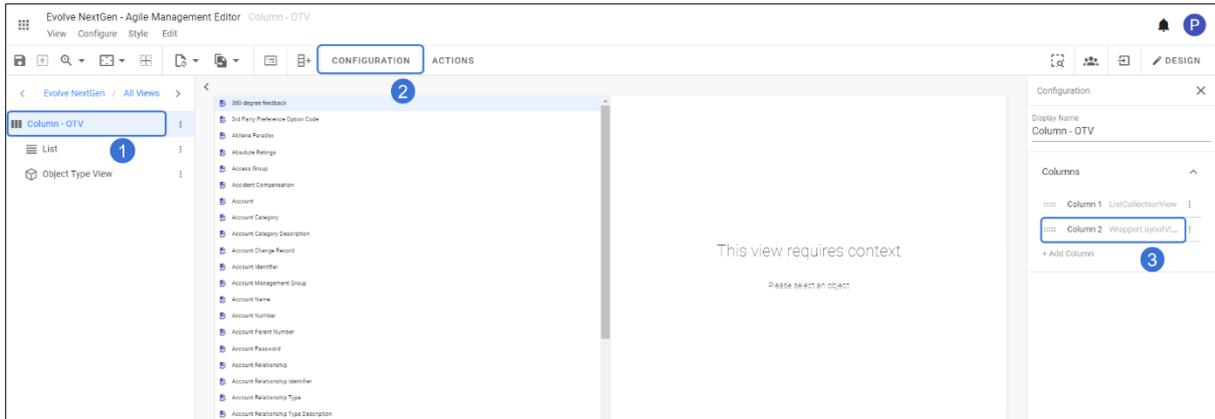
4. Select the **Context Source** as **Internal**.

5. Click on **Apply Changes**.
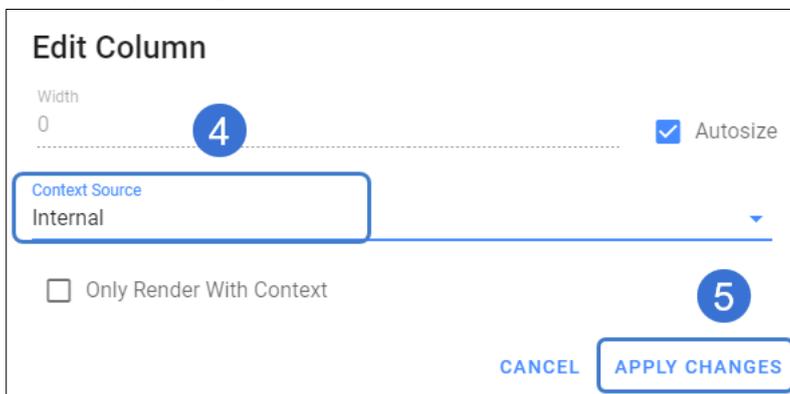
Element List and its **Object Type** details are displayed as shown in the picture below.
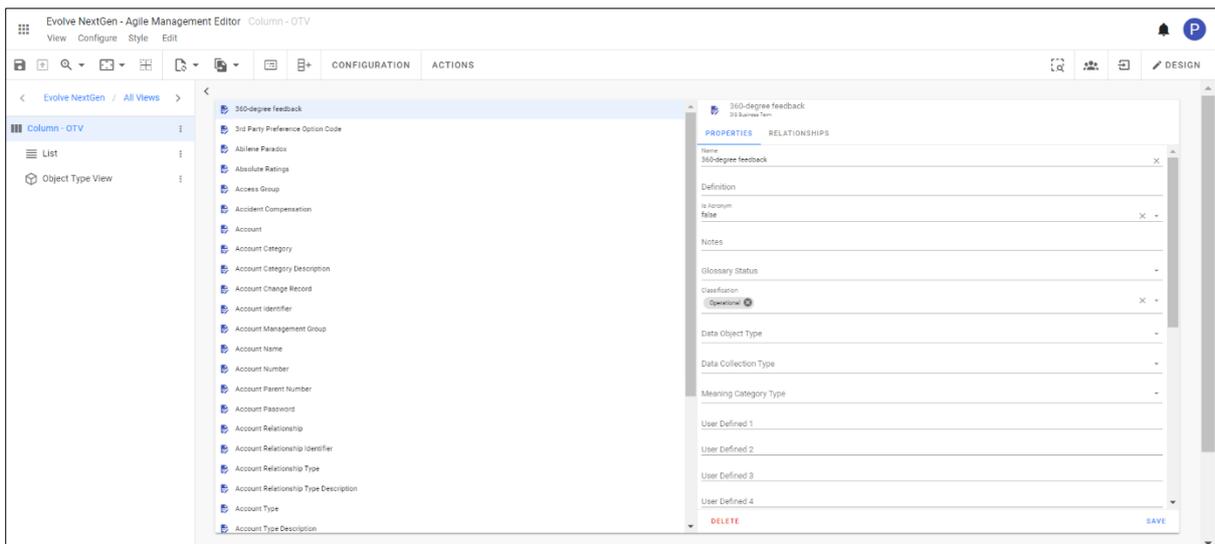
ℹ️ The columns can be customized as per the use cases. It can be chosen any sort of **Collection Views** like **Charts, Kanban Boards, Tables, etc**..

ℹ️ There are two types of **Context Sources** to render the information of the elements. **Internal source** is considered when the information is rendered within the Layout. If the information of the element is to be rendered from the outside of the Layout, then the **External Source** must be selected.

Customization of View

Customization of a view can be performed by applying **Filters, Events, Heatmaps, Overlay Filters, Actions, Headings.**

Filters

Filters are applied while configuring the view to display the data, which can be applied in two ways. The first is defining the new set of filters using **Filter Criteria,** and the other is applying the already defined filter using the **Existing Filter.**

Steps to apply Filter Criteria:

For instance, in a list view, **Filter Criteria** is applied to **Data Source Type** to extract the necessary list of items based on the **Object Type's Properties.**

1. Click on **view** under the **Layout,** go to **Configuration**, which appears on the pane's right side.
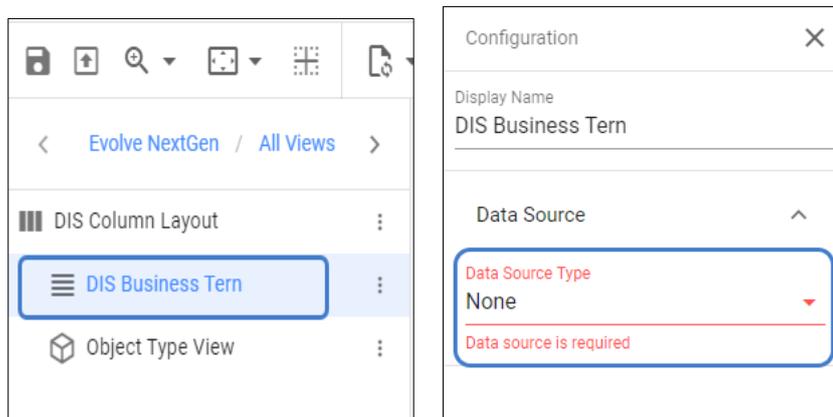
   By default, **Data Source Type** will be **None.**

2. Select the **Filter Criteria** under the **Data Source Type.**
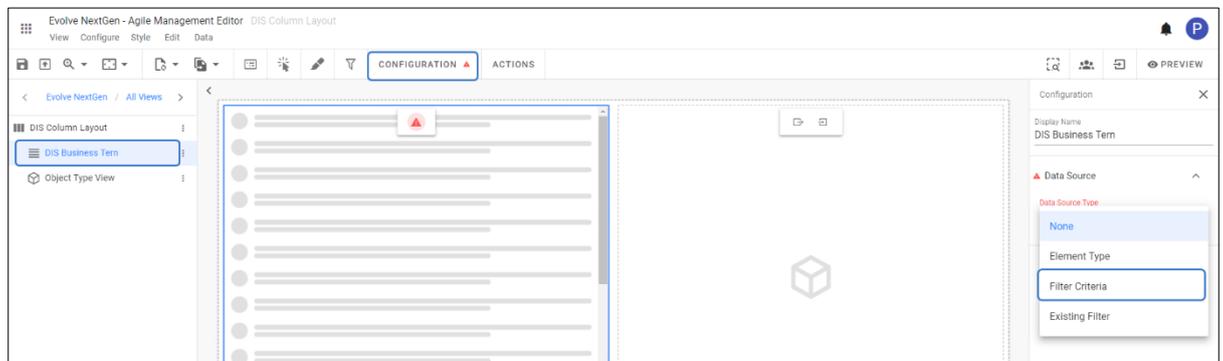
   An option to edit will show up right after the selection.

Click on **Edit Criteria.**

A dialog with the editor opens, choose the **Object Type** for a selected view and properties of that **object.**

Click on **Apply Changes** to save.

i

With Filter Criteria, multiple Object Types and Properties can be added or deleted by clicking on the [+] icon or [🗑] icon against the entry.

Steps to Apply Existing Filter:

1. Click on **view** under the **Layout,** go to **Configuration**, which appears on the pane's right side.
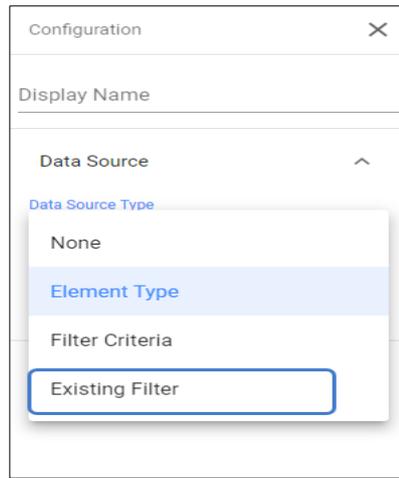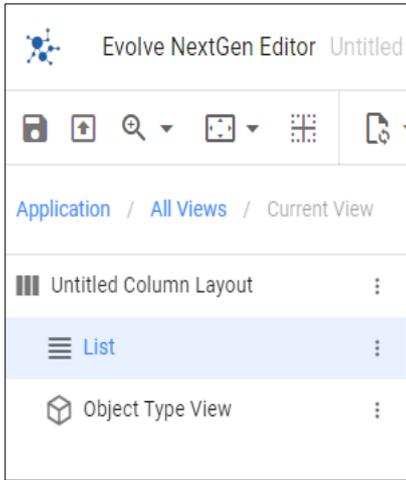
2. Select **Existing Filter** from the list. Choose the desired filter to apply in the **view.**
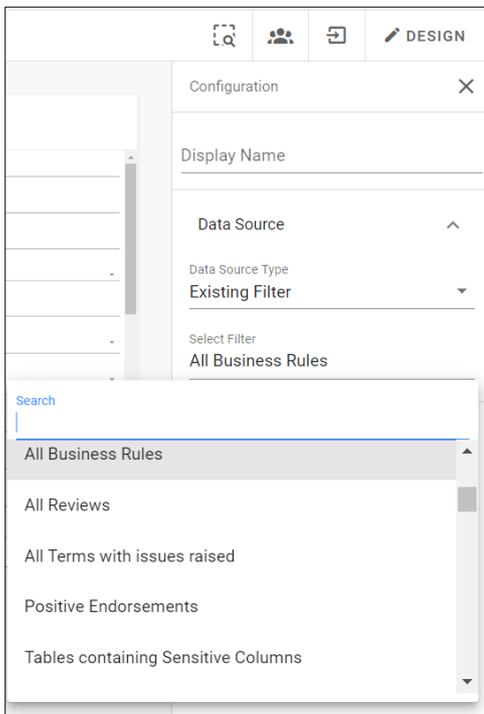
Events

Events help the users define what happens and what view appears when the interact with an element in the view.

For example: Open a panel displaying the object type view if they click on a row in a table

Events can be found under **Configure** tab or on the toolbar.
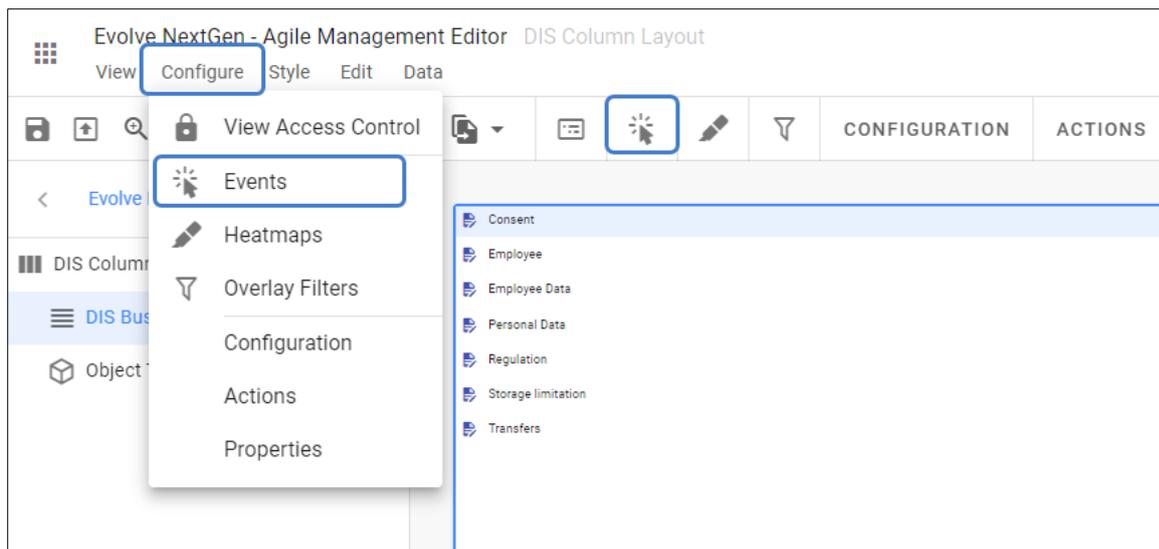
There are two types of behaviors for an Object Type.

1. **Trigger Context** – is used to pass the **Object Type** selected to the other **view**.

   E.g., In the below example, the **Element Type** defined passes the object and displays it in the **Object Type View** within the **Layout.**
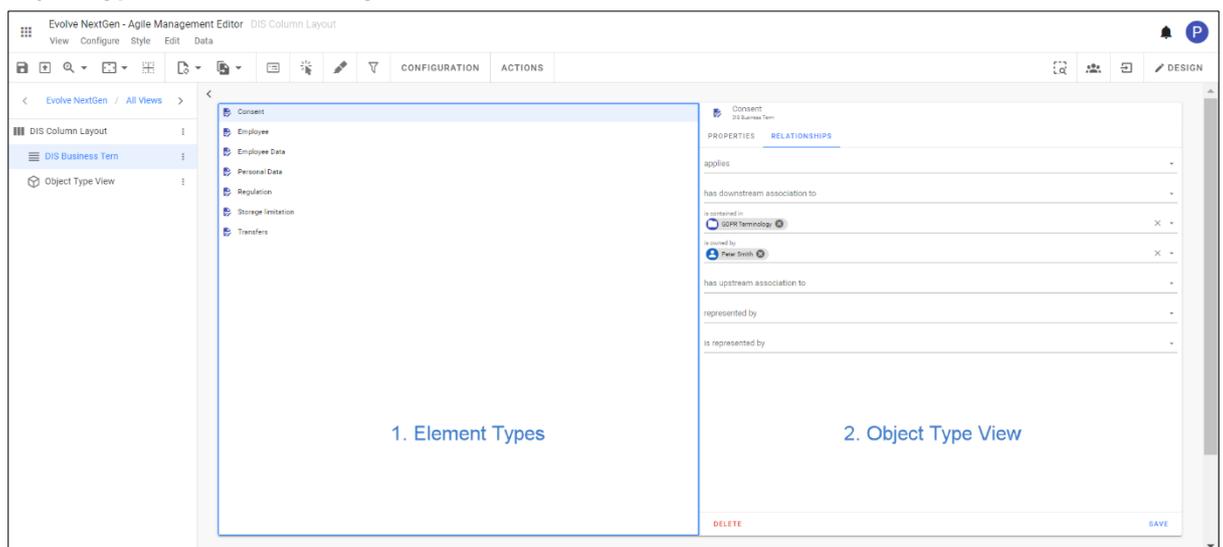
2. Open View – It opens the **Object Type View** in **Window, Dialog, Panel** and **Tab.**

Dimensions of the View can also be customized by giving the **Height** and **Width.**
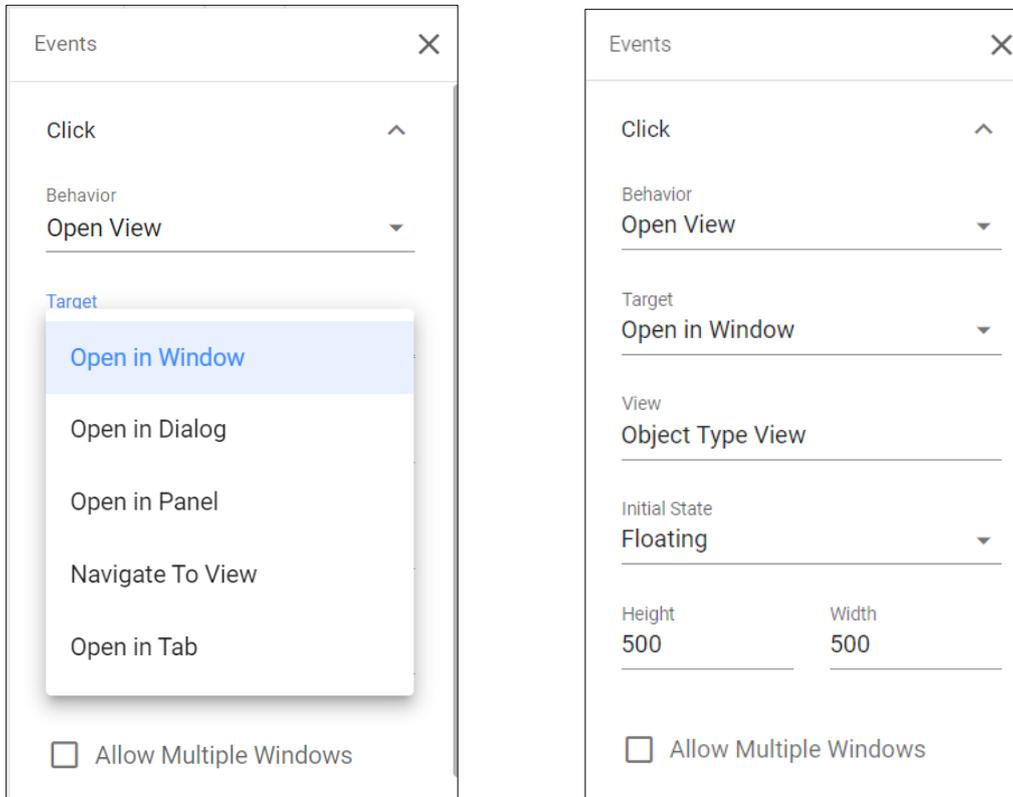
The **Initial State** of the View can be set in different ways, i.e., **Floating over the screen, in Full Screen, Snapping to the left, right, top and bottom.**
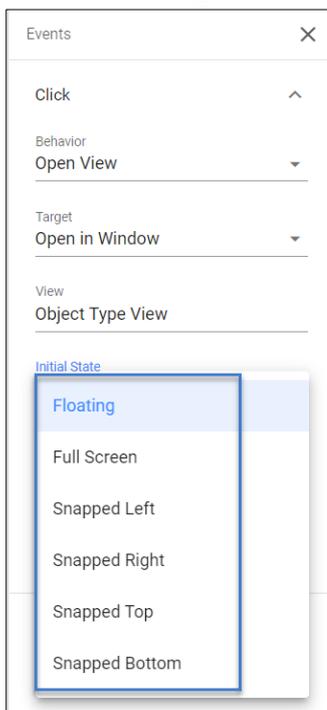
Heatmaps

Heatmaps help to highlight the required information of the **Element Type.**

To add the **Heatmaps**, click on the [pencil icon] icon in the toolbar or find under the tab **Configure**.

A popup appears on the right side of the pane.

1. Click on **Add Heatmap**.
2. Click on three dots against the **New Heatmap.**
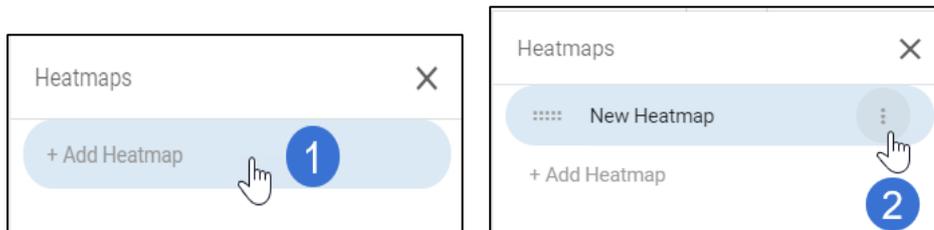
3. Click on **Edit,** a dialog box appears.

    Input the Label and choose **Filter Criteria,** then click on **Edit Criteria.**

Choose the Object Type and enter the properties of the object to display.

For instance, select **Object Type** as **DIS Business Term** and property as **Name** – **Starts with C.**
Then click on **Apply Changes.**

4. Applied **Heatmap** appears as a breadcrumb over the top of the view by highlighting the information.

Overlay Filters

Overlay Filters are applied to filter the data within the view of the Layout.

To apply the **Overlay Filter**, click on the [▽] icon in the toolbar or find under the tab **Configure**.
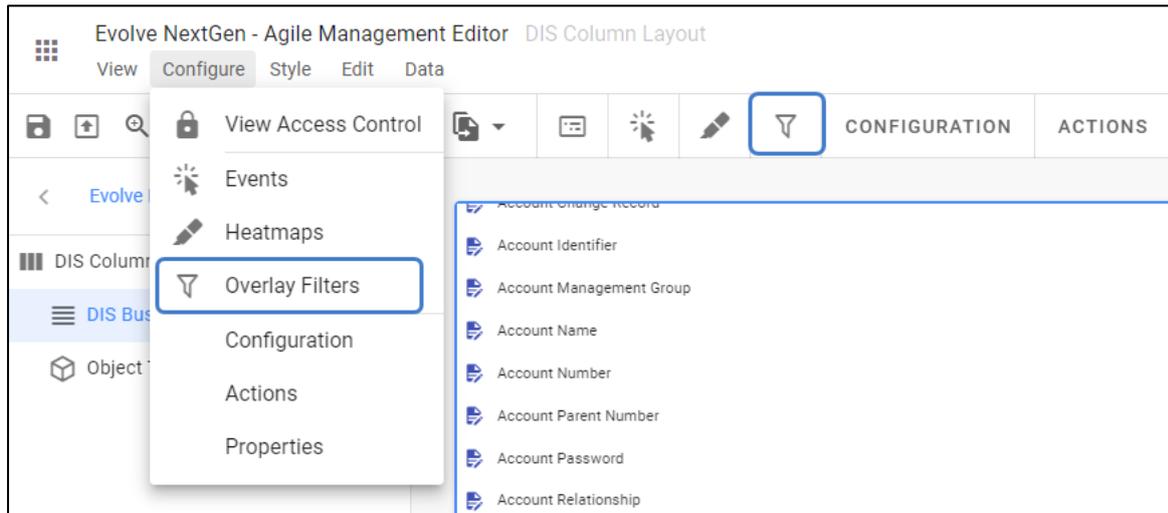
A popup appears on the right side of the pane.

1. Click on **Add Overlay Filter**.
2. Click on three dots against the **New Filter.**
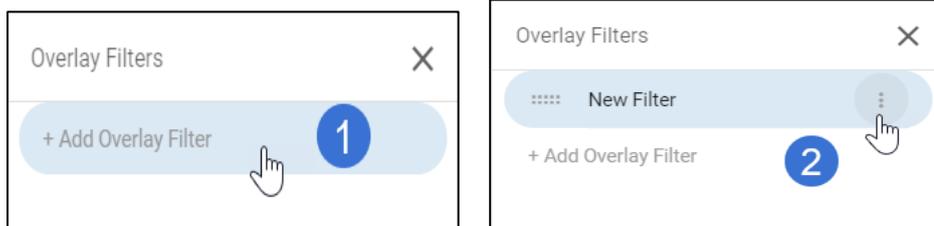
3. Click on **Edit,** a dialog box appears.

   Input the Label and choose **Filter Criteria,** then click on **Edit Criteria.**

Choose the Object Type and enter the properties of the object to display.

For instance, select **Object Type** as **DIS Business Term** and property as **Name-Starts with B.**
Then click on **Apply Changes.**

4. Applied Filter appears on the top right of the view.

Select the required filter to see the data.

Header Style

To add **Header Style** to the view,

1. Go to **Style** tab on the toolbar, then select **Header Style**.
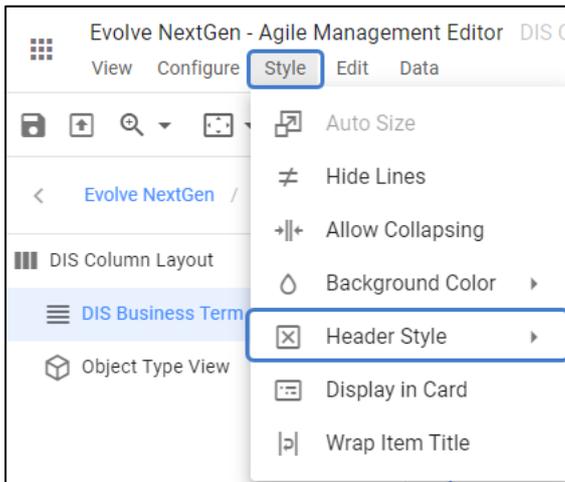
2. By default, the style selected would be **None**. Select the **Header Style** from the drop-down you wish to apply.
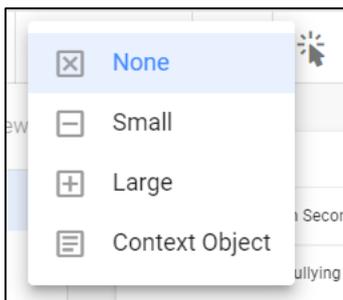
- **Small** and **Large** are **Header Styles** differ with the font sizes.
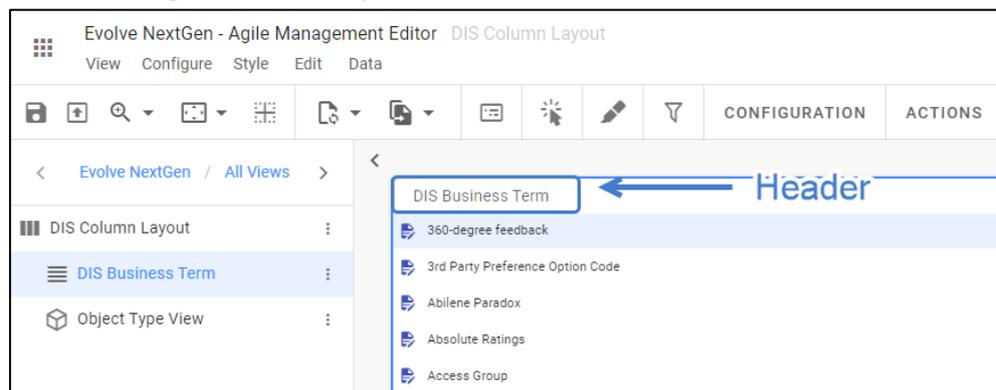
- **Context Object** is the style that renders the display name from the Element Source. **Context Object** style is typically used for the **Object Type View.**
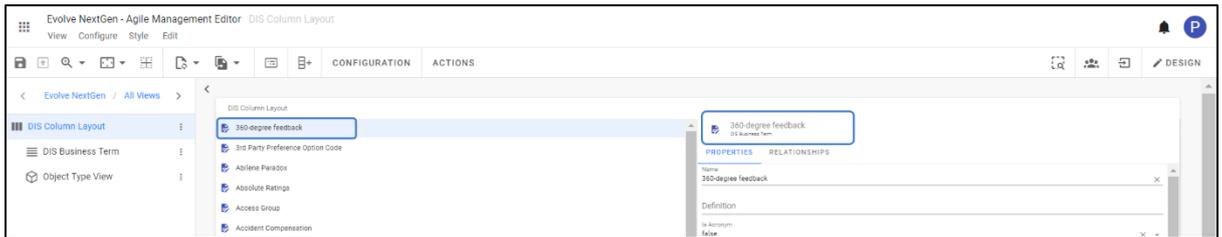
In the above example, the **list** of elements displayed in the first column and its **Object Type View** is defined in the second column. By selecting the style **Context Object,** a selection of individual elements is displayed for its **Object Type.**

3. To apply the **Underline** to the **Header**, go to tab **Style** and then select Show header Underline.
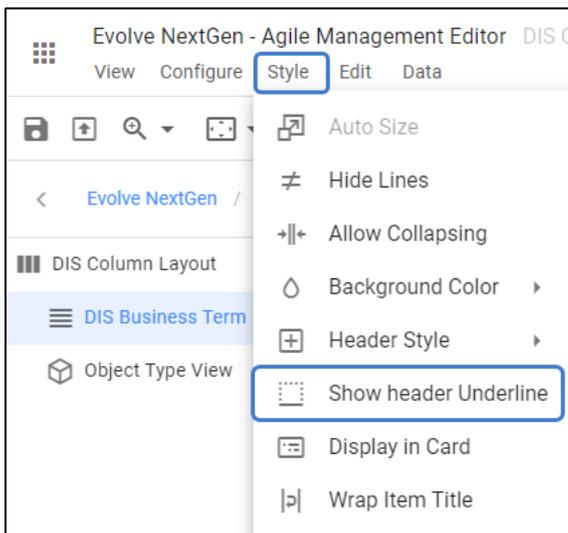
ℹ️ **Show Header Underline** option will be visible only after you select **Header Style** other than none.

4. To apply **Color** to the **Header line**,
   - Go back to the tab **Style** then select **Header Underline Color.**
   - Choose your desired color.
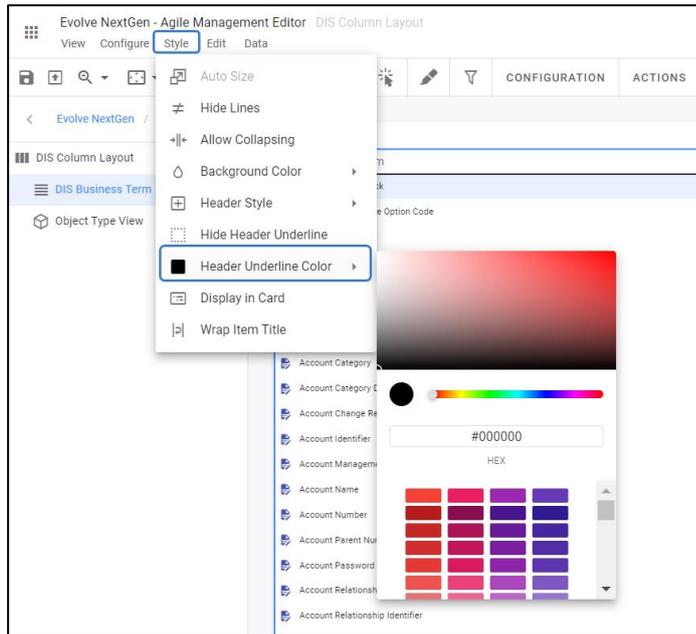
Diagramming

Overview of Diagrammer

Diagrammer is used to both edit and create any Evolve Diagram online.
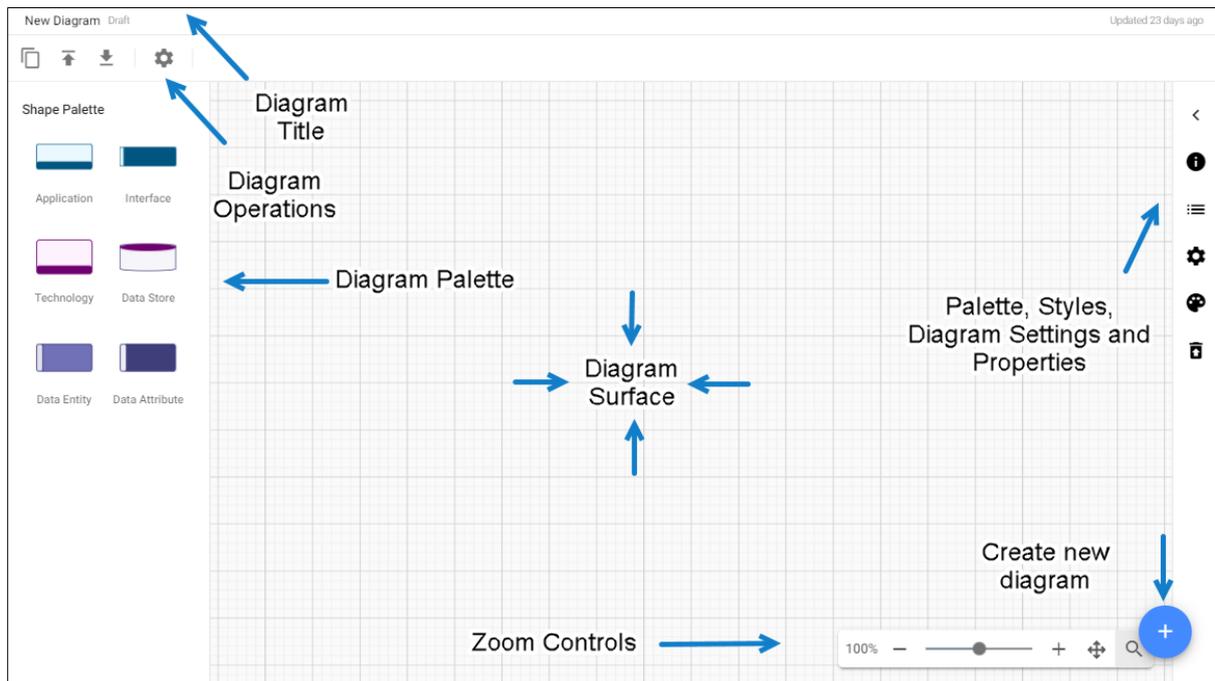
The different features within the Editor are detailed below:

Diagram Title	Editable title for the diagram, this differs from the diagram name, which must be unique	Click to rename the title
Zoom Controls	Zoom % - Click to choose presets Zoom in and out - [+] and [-] Zoom Slider Radar button Click and move the 'Radar' view to zoom around the diagram. All can be collapsed to a single magnifier button.	

Shape Palette	The Shape Palette contains all the shapes that can be used on the diagram. Drag and drop the shapes from the palette onto the diagram surface Note that lines / connectors are drawn from the (+) buttons around the sides of a selected shape.	**Shape Palette** Service Catalog - Level 1 Service Catalog - Level 2 Service Catalog - Level 3 Existing Service Future Service Process
Shape and Diagram Tools	Home to the different panes in Diagrammer: Properties, To Do, Diagram Settings, Palette &Styles and Deleted Objects.	Capability Model Published Name Name Capability Draft Suffix Title Capability Model Description Save
Canvas Area	The area where the edited/created Process Diagram will display.	**Canvas Area**
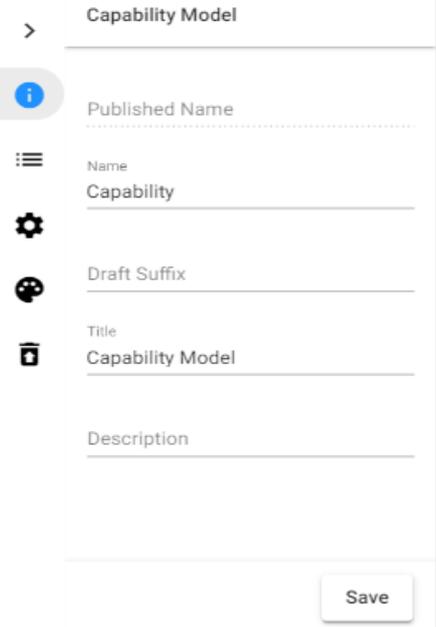
Navigation

Diagrammer controls that can be used when editing a diagram.

Click Summary

Mode	Click Type	Behavior
Standard	Single	Selects a shape and updates the "Shapes and Diagram Tools" pane for that Shape/Connector, if the pane is open.
	Double	Opens the "Shapes and Diagram Tools" pane, if it is closed, and navigates to the Name and Properties tab. For easy access to the object details.

Keyboard Shortcut Summary

Keyboard Shortcut	Behavior
Ctrl+ +	Zoom In
Ctrl+ -	Zoom Out
Esc	Deselect all shapes
Delete	Deletes or Clears the selected Shape(s)/Connector(s)

Formatting Shapes in Diagrammer

Adding Shapes, Connecting Lines to the Diagram, and Changing Properties

To add shapes to the diagram,

1. Drag and drop the required shape from the **Shape Palette.**
2. Double-click on the object shape to edit the **Title** and its **Properties.**
3. **Click Save.**
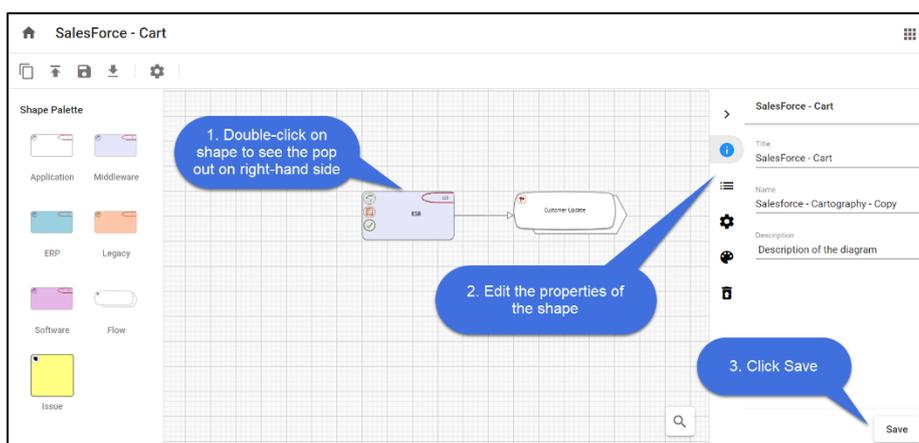
You can use a Connector to link two Shapes, indicating that there is a connection between the two shapes.

To add the connector between the shapes,

1. Select the first shape by clicking on it.
2. Click on one of the + symbols to add the connector and move your mouse pointer to the shape you would like to connect to.
3. Click on the shape to end the selection.
4. If there are multiple connection types between these kinds of objects, you will get a menu to choose the connection that is appropriate.

To Clear or Delete Shapes from the Diagram

Object Shapes can be Cleared or Deleted from the diagram in two ways.

 To Clear a Shape:

When you choose to **Clear** a shape, it removes the shape from the diagram, but it does not remove the object it represents from the model.

1. Select the shape you wish to **Clear.**

2. Click on × icon.
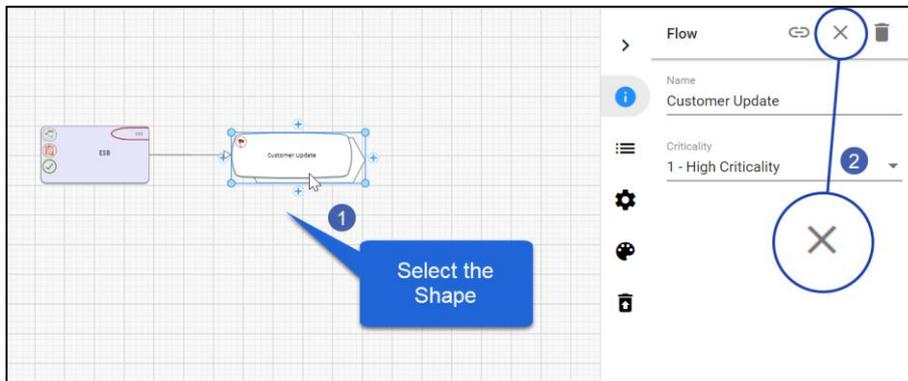
To Delete a Shape:

When you choose to **Delete** a shape, it removes the shape from the diagram, and when published will remove the object representing from the model too.

1. Select the shape you wish to **Delete.**

2. Click on 🗑 icon.
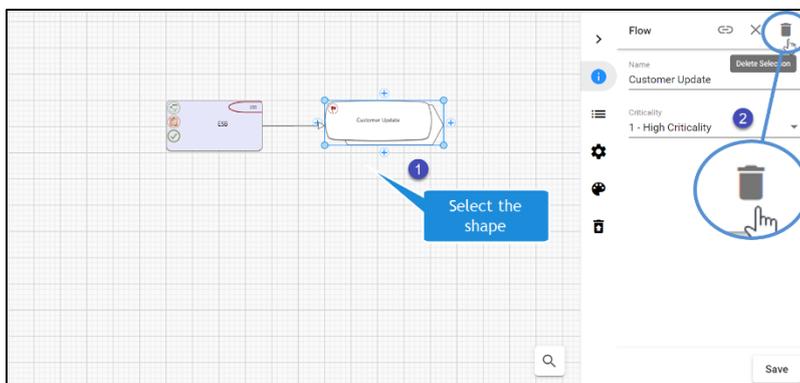
ⓘ If a shape is deleted, any connector associated with the object shape also gets deleted.

ⓘ When object shapes are deleted using the **Delete** option, it adds the item to the Trash can icon called **Deleted Objects** on the right-hand pane.

Adding Background Colors and Borders to the Shapes

Every Shape from the Palette has a definite background color, border size, and border color.

You can format the shape by

1. **Background Color** of the shape.
2. **Border Size** to the shape.
3. **Border color** to the shape.
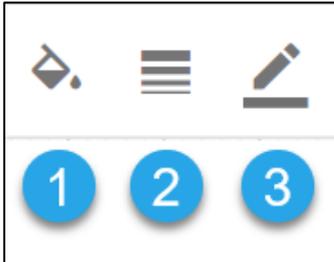
> ℹ️ When object shapes are deleted using the **Delete** option, it adds the item to the Trash can icon Some shapes may have **Region shapes** and **Region formatting** which overrides these styles such that the style options will not work.
>
> Example: A shape may be set with color because of the "Category" of the object, i.e. the shape may be **Red** because it is a critical object (as defined in one of its properties).

Aligning Shapes

Object shapes in the editor can be aligned using **Align Nodes** placed on the toolbar.

Object shapes can be aligned to the **Left, Right,** and **Center** horizontally**,** and also **Top, Bottom,** and **Center** vertically, which can also be evenly **Distributed Horizontally** or **Vertically**.

Resizing Shapes to match others

In the **Diagrammer**, the object shape can be adjusted to the height and width of the other shape using **Resize Nodes.**

The Size of one shape can be adjusted to the size of the other object shape with respect to the **Height** and **Width.**

Move Shapes from Back and Front

In the diagram, if one shape is put on top of another, it may conceal the other.

Move To Back and **Move To Front** buttons help to show/Hide the object shape.

Text Formatting and Fonts

The Title of Object shapes can be formatted according to:

1. **Font** and its **Font Size**
2. Text in **Bold, and Italic**
3. Text alignment to **Left, Center, and Right.**
4. **Vertical Alignment.**
5. **Text Color.**
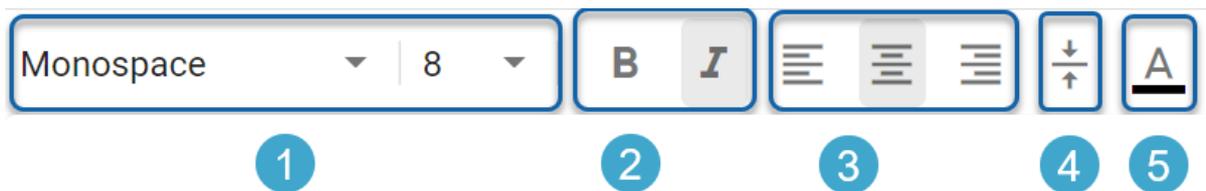
> **i** Some shapes may have **Region shapes** and **Region formatting** which overrides these styles such that the style options will not work.
>
> Example: A shape may use a different property for the Title, that is defined in a region. This region's style cannot be overridden by Diagrammer

General Operations in Diagrammer

Options that are generally available for any diagram in the canvas are:

1. Duplicate Draft
2. Publish Diagram
3. Download Diagram

Duplicate Draft:

To duplicate the working draft of the diagram, click on **Duplicate Draft** on the toolbar.

By doing this, a copy of the draft will be created, and you will be taken immediately to the draft diagram.

The draft diagram will be associated with the originally published diagram, and on publishing will replace the same published diagram.

> **i** | To create a separate published diagram, you should duplicate the published diagram instead

Publish Diagram

To publish the diagram, click on **Publish Diagram** icon on the toolbar.

Before proceeding to **Publish** the diagram, make sure you don't have any incomplete items in To-Do list. Once published, the draft diagram will be deleted, and the published diagram will be available in the application.

Download Diagram

To download the diagram in the form of an image to your machine, click on **Download Diagram** on the toolbar.


Diagram Settings

To apply the settings related to the diagram **Grid, Animation** and **Guiding lines** in the editor, click on **Diagram Settings** on the toolbar.

You will see a panel popped up on the right-side of the screen to work on settings.

Working with Connector Lines

The lines which associate the two objects in the diagram are called **Connector Lines.**
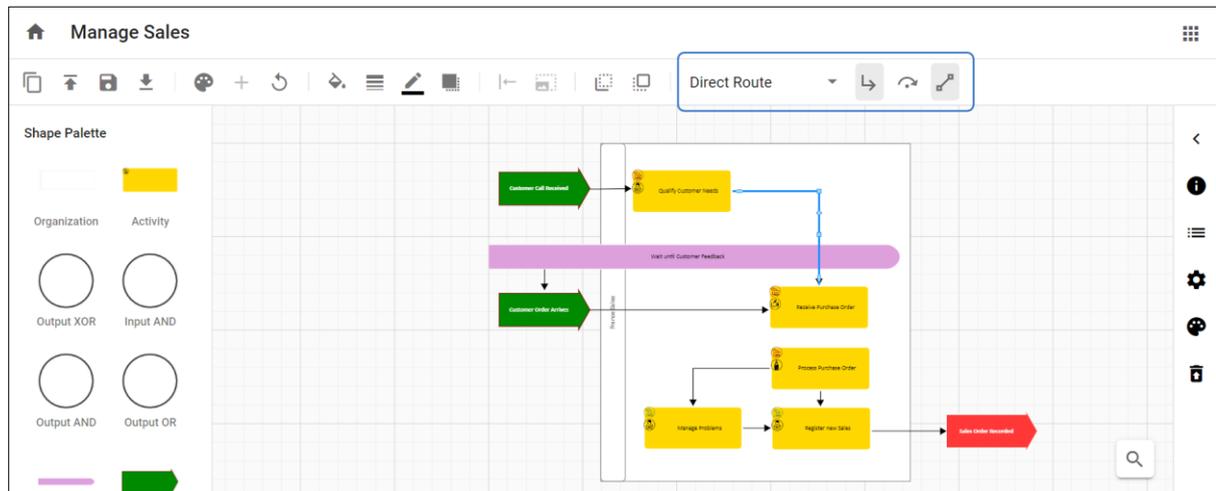
Double-click on the line, then the options for connector lines are shown on the toolbar.

Lines can be applied in two ways:

1. **Direct Route** – connects the objects using the shortest path.
2. **Avoid Route** – connects the objects avoiding the other objects in the diagram structure.

Lines are of three types are available to connect the objects:

1. **Orthogonal Lines** – **Orthogonal Lines** are when the line appears with right angles in order to connect the two objects when it cannot be drawn horizontally or vertically.
   This line is available only under Direct Route and will be disabled for Avoid Route.
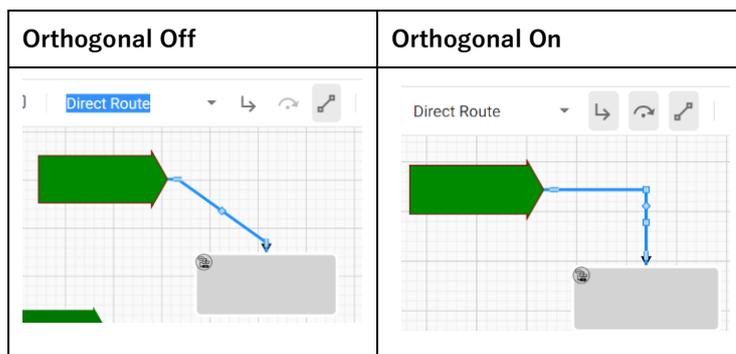
2. **Jump Lines** – **Jump Lines** are when one connecting line passes over another, and it appears with an arc over it.

   This button is used in conjunction with the orthogonal lines button. If an orthogonal line is off for a particular line, then the jump line button is disabled.
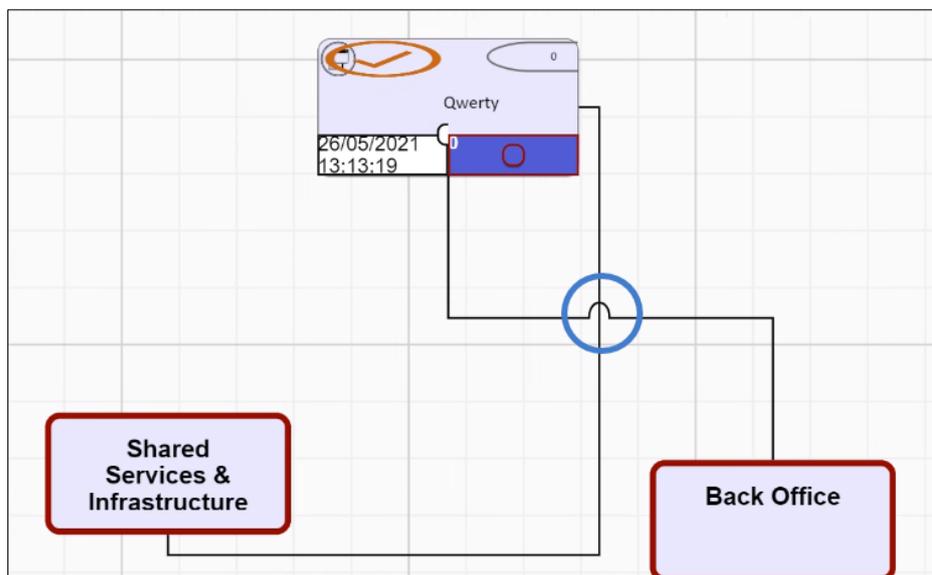
   Jump is a property of an individual line, so if the lines cross and neither have the jump property then they look like straight lines passing through one another. Jump lines will be seen if both lines have jump property.

3. **Lock/Unlock Link Port** – Link Ports can be Locked or Unlocked. To lock them, either press the button or move the connection point (port) of the line, around the shape. When you select a location

to port the line to the shape, it will become locked. If you want the Diagrammer to automatically reposition the port, select the line, and press the unlock button, to release the lock.

Locking the link ports helps to keep the specific connection point when the shapes are moved around the canvas.

Administration

## Client and User Settings

Client & Users helps to add new user, license management, and to register requests.

> **i** You need to have administrator rights to perform any action related to users.

To set the settings, go to profile icon on the top right corner, select **Client & Users.**
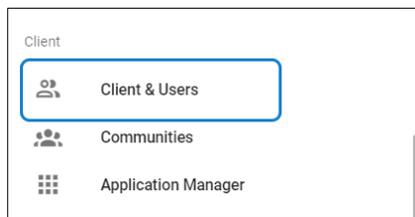
1. To set the existing user with **Administrator** rights**,**

    Go to **Client** > **Administrator** > **Save**
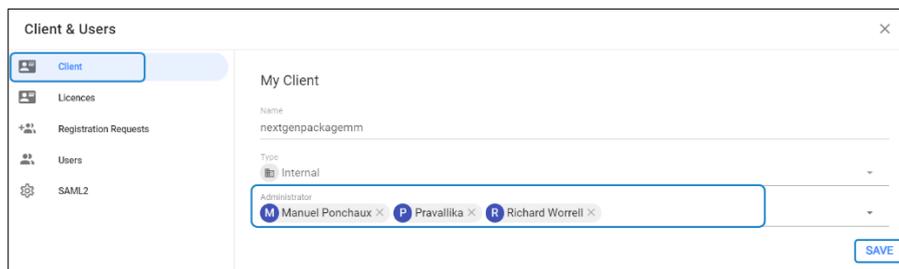
2. Under License tab, you can view your available Licenses for the product. You can assign licenses to registered users by clicking on **User** in the table and to remove the license for the assigned user, click on cross against the user on selection.
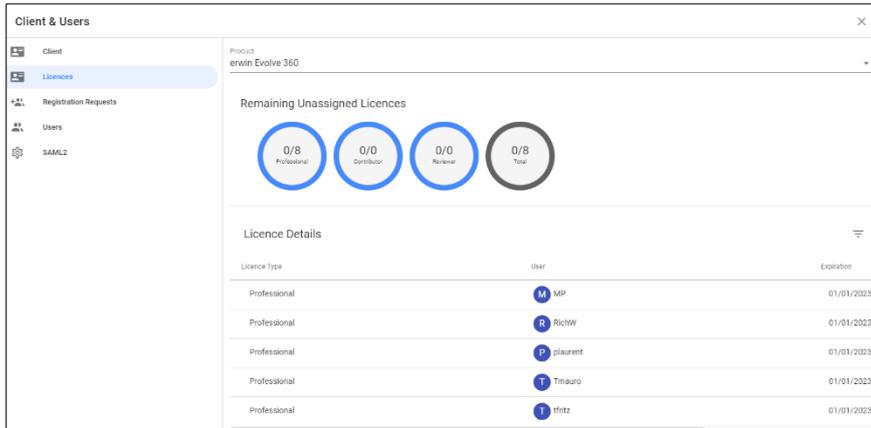
3. **Registration Requests** tab helps to register the new users.

Click on + symbol on top of the table, enter the **Email address** of the user and click on **Save.**

Soon after, user will receive a **Registration Request email** saying that an account has been created and asks to **Activate Account.**

4. **Users** display the whole list of registered users with the license information.
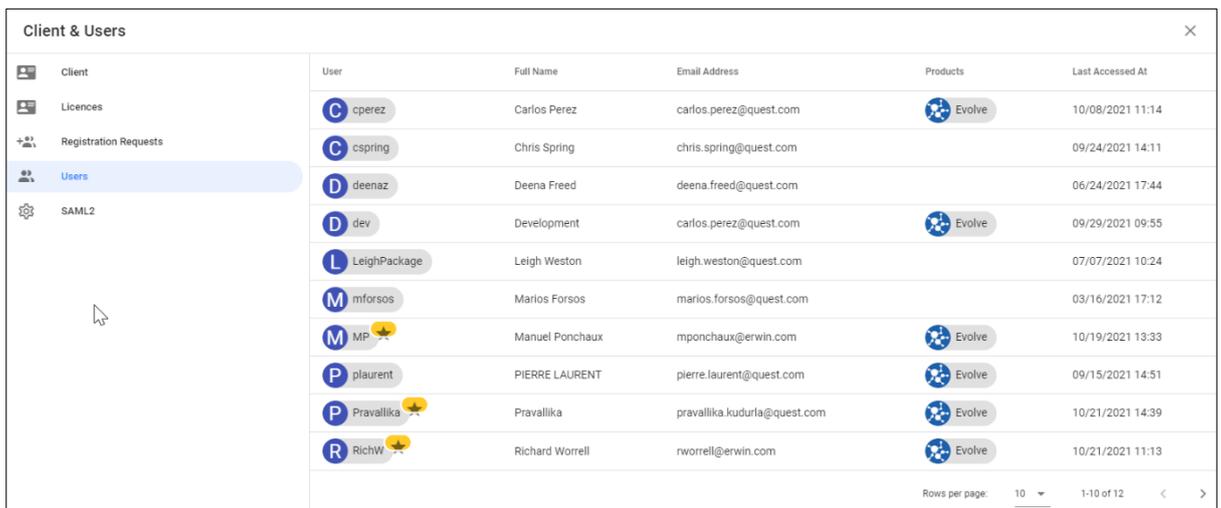
Communities

Communities are a defined set of users identified as group of individuals or teams, that work together to achieve a common goal.

By default, an object will not have any communities and therefore visible to all users.

In **Evolve 360**, **Communities** are of two types. These community types control the access of communities to concepts within the platform.

- **Public** – visible to every user
- **Private** – visible only to those within it and will be hidden from users who is not a member

How to create a new Community?

i | A user with administration rights will only have a privilege to create a community.

To create a new **Community,**

1. Go to profile and then select **Communities**.
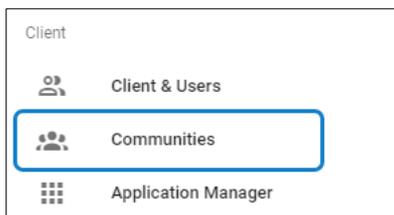
2. A screen appears with the list of communities on the left-hand side and its details on the right-hand side upon selection of community.
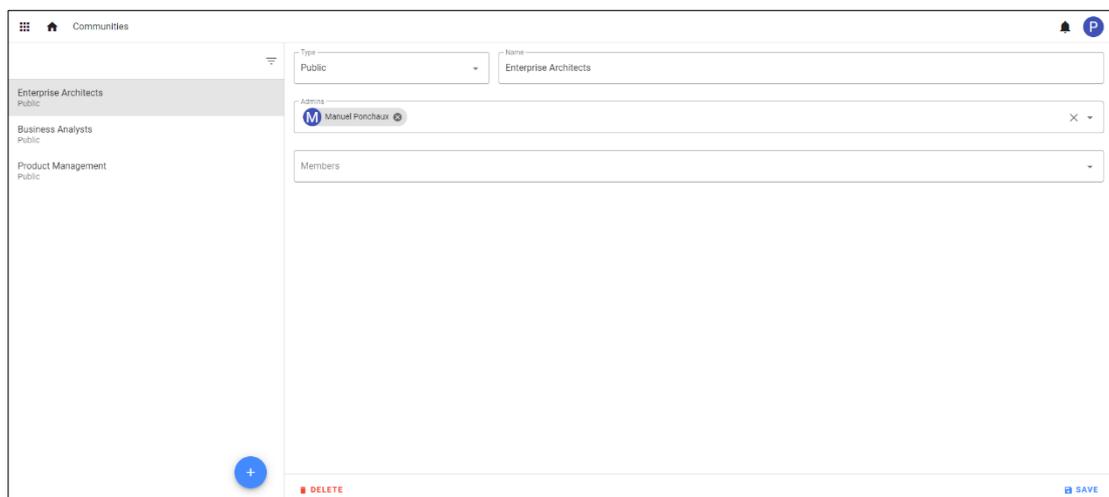
3. To create a new community, click on button at the bottom of left-hand side screen.

4. Enter the details in the form on the right-hand side of the screen.

  i. Set the Community to be either Public or Private.

  ii. Enter the Name for your new community.

  iii. Choose an Administrator from the list of users.

  iv. Select the members you wish to be a part of community.

5. Click on **Save** to finish.

How to Add/Remove users to an existing Community?

1. Go to profile and then **Communities.**
2. Select the community from the list appeared on the left-hand side of the screen, then its details will be shown on the right-hand of the screen.
3. Click on **Members**, check the box against the name of the user you wish to add or uncheck the box to remove the user.
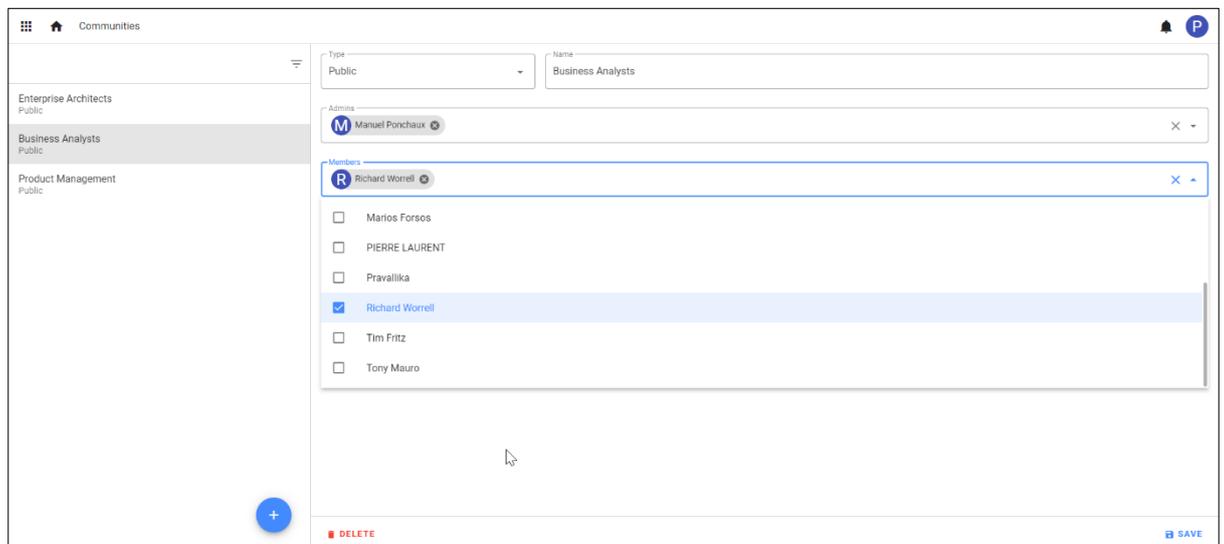

4. Click on **Save** to finish.

How to restrict a view to single Community or set of Communities?

An administrator has the access to restrict a view to a certain community or set of communities.

To restrict a view,

1. Go to application editor of the view you wish to restrict.
2. Go Configure and select View Display Control.
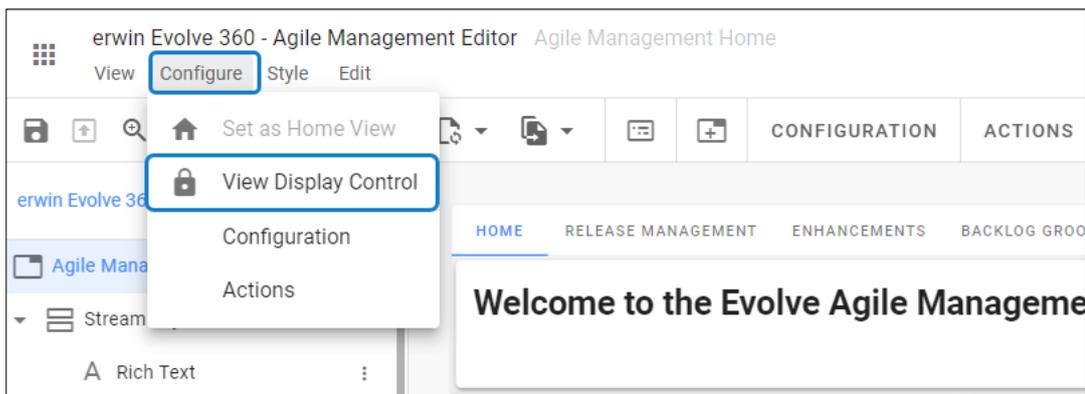
3. A screen will be shown up with the details.
   i.   Select the **Communities** you wish to restrict the view to by clicking on their names.
   ii.   Select the **Data Source** to include with the context.
   iii. Click on **Apply.**
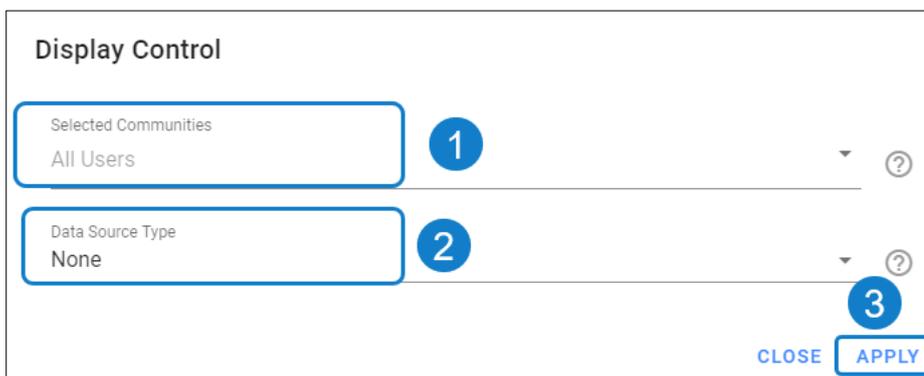
> **i** If no **Communities** are selected, it displays to all users, or it displays only to the selected **communities**.
>
> A data source of **None** mean that will always display. When a data source is selected it only displays when the context item is included in this data source.

Import/ Export

**Import** and **Export** are the bulk operations deals with your application data.

Import

To Import the data,

1. Go to **Profile**, click on **CSV Import**.

2. A screen appears with the list of imports, and their status.
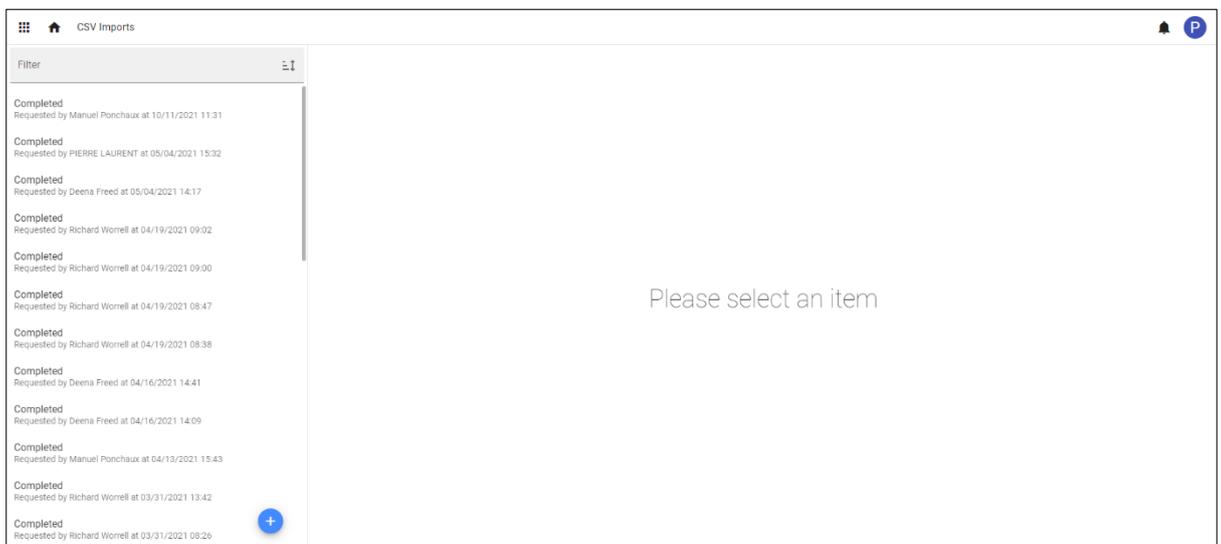
3. To create a new **Import**, click on button from the bottom of left-hand side of the screen.
4. Enter the fields in the screen that is presented.
    i.   Select **Column** and **Value Delimiter**.
    ii.   Either drag your file into the selection box or **Click to Upload** the file.
5. Once the file uploaded, it is added to the import queue.
    You are then able to track the progress of the import and can view logs after completion. You can also see a report of what errors have occurred.

i Import operation requires a file with the specific format. Make sure you have that format before importing the file.

Export

To Export the data,

1. Go to Profile, click on **CSV Export.**

   Bulk Operations

   ☁ CSV Object Import

   ☁ CSV Object Export
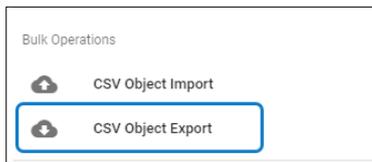
2. A screen appears with the list of exports, their status, and a download link of the file.

3. To create a new **Export**, click on ⊕ button from the bottom right corner of the screen.

4. Enter the fields in the screen that is presented.

   iii.   Select **Column** and **Value Delimiter**.

   iv.   Select your **Object Type.**

   v.   Click on **Create.**
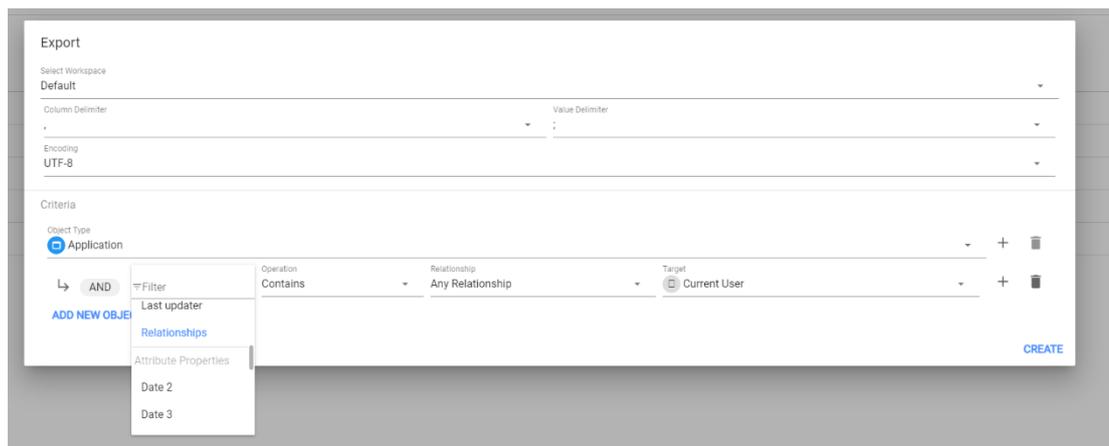
5. You will receive an email after successful export.

ℹ | You can select single or multiple object type and define further criteria. E.g., Status equals or has a relationship with some object.

About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at https://support.quest.com.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

    i.   Submit and manage a Service Request

ii. View Knowledge Base articles

iii. Sign up for product notifications

iv. Download software and technical documentation

v.   View how-to-videos

vi. Engage in community discussions

vii. Chat with support engineers online

viii. View services to assist you with your product.