



**erwin Data Intelligence Suite**

**Life Cycle Management Guide**

**Release v10.2**

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## Managing Life Cycles

This section walks you through life cycle management in a data integration project. It involves requirements, release, and test management.

- Requirements management is done via Requirements Manager. It involves standardizing functional requirements documentation, creating, collaborating, and customizing templates to manage functional requirements, and linking requirements to data mappings.
- Test management is done via Test Manager. It involves viewing and analyzing test specifications created under Metadata Manager and Mapping Manager.
- Release management is done via Release Manager. It involves creating and managing releases and release calendars. You can release data mappings, database objects, and release notes to standardize the release process.

## Using Requirements Manager

To access the Requirements Manager, go to **Application Menu > Data Catalog > Requirements Manager**.

The Requirements Manager dashboard appears:

#	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	1	TechPubsWrite	TechPubs		Pending Rev.	Administrator	04/09/2020 03:44:43	Administrator	04/09/2020 03:44:43			
2	2	Trcl	TechPubs/TechPut		Pending Rev.	Administrator	07/22/2020 10:19:13	Administrator	07/22/2020 10:19:13			
3	3	Trcl1	TechPubs/TechPut		Pending Rev.	Administrator	07/22/2020 10:42:35	Administrator	07/22/2020 10:42:35			

UI Section	Function
1-Requirements Workspace	Use this pane to browse through projects and specifications. It enables you to categorize and create specifications under projects.
2-Right Pane	Use this pane to view or work on the data based on your selection in the Requirements Workspace.
3-Summary	Use this pane to view a summary of projects.

Managing requirements involves the following:

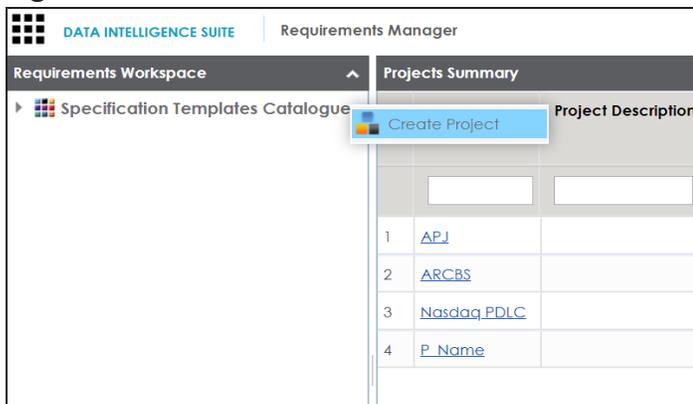
- [Creating and managing projects](#)
- [Creating and managing specifications](#)
- [Linking the requirements to mappings](#)

## Creating Projects

Projects are collections of your functional specifications and requirements. To define functional specifications, you can use the [templates](#) that were created under Requirements Manager settings. You can group these specifications under subjects.

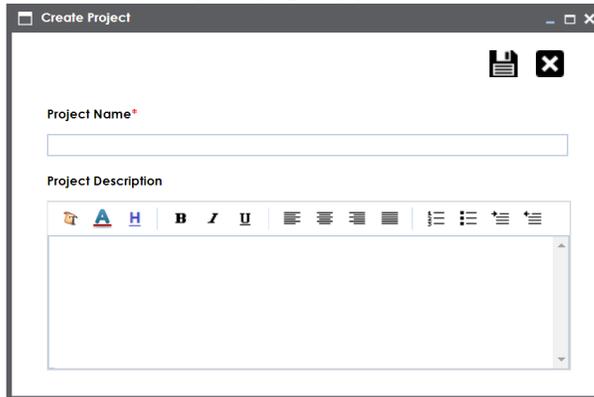
To create projects, follow these steps:

1. Go to **Application Menu > Data Catalog > Requirements Manager**.
2. In the **Requirements Workspace** pane, right-click the **Specification Templates Catalogue** node.



3. Click **Create Project**.

The Create Project page appears.



4. Enter **Project Name** and **Project Description**.

For example:

- **Project Name:** Nasdaq PDLC
- **Project Description:** This project captures functional and business requirements of the data migration project

5. Click .

The project is created and added under Specification Templates Catalogue.



You can also create subjects under projects to group specifications by their functions.

Once a project is created you can:

- [Configure users](#)
- [Create specifications](#)

Right-click or select a project in the Requirements Workspace pane to manage it. Managing projects involves:

- Creating subjects
- Editing or deleting projects
- Viewing project specifications

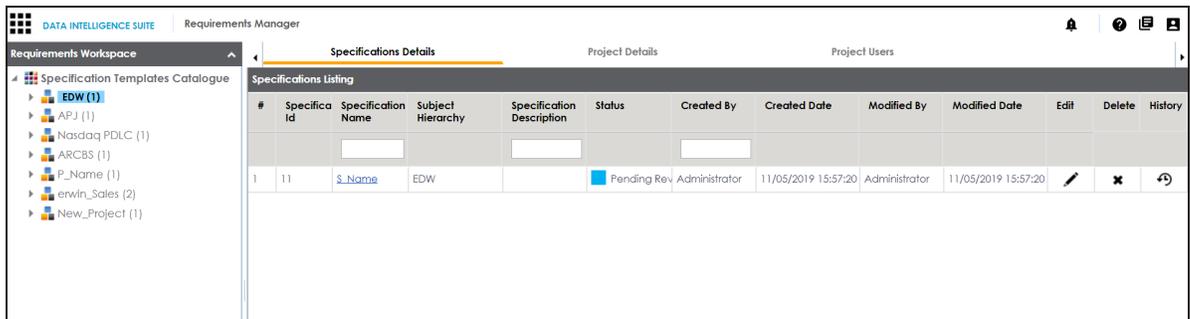
# Configure Users

Once you have created a project, you can configure users to access and work on the project. These users will have Write access to all subjects and specifications under a project.

To configure users, follow these steps:

1. In the **Requirements Workspace** pane, select a project.

The following page appears.



2. Click the **Project Users** tab.



3. Click **Configure Users**.

The Assign/Unassign Users page appears.

Assign/Unassign Users

#	Assign/Unassign User	User ID	User Full Name	Assigned Roles
	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	<input type="checkbox"/>	mboggs	Mike Boggs	ETL Developer
2	<input type="checkbox"/>	Cyrus	cyrus	Mapping Designer
3	<input type="checkbox"/>	ks123	kartik sridhar	Mapping Designer
4	<input type="checkbox"/>	janedoe	Jane Doe	Power User
5	<input type="checkbox"/>	public	public - Default System User	public
6	<input type="checkbox"/>	mread	mread	METADATA_READ
7	<input type="checkbox"/>	sconnery	Sean Connery	Power User
8	<input type="checkbox"/>	new_user_id	Robert Wilson	Mapping Admin
9	<input type="checkbox"/>	jdenver	John Denver	Power User

**Note:** Only Non-Administrator Id's are displayed here

4. Select one or more users to assign them to the project.

5. Click .

The selected users are assigned to the project.

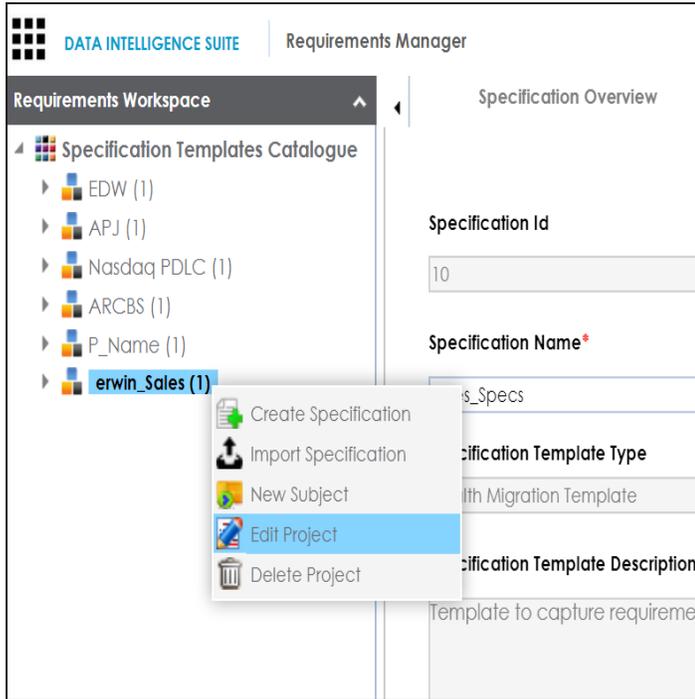
## Managing Projects

Managing projects involves:

- Creating subjects
- Editing or deleting projects
- Viewing project specifications

To manage project, follow these steps:

1. Right-click a project to view project management options.



2. Use the following options:

### **New Subject**

Use this option to create new subjects. Subjects let you group specifications logically.

### **Edit Project**

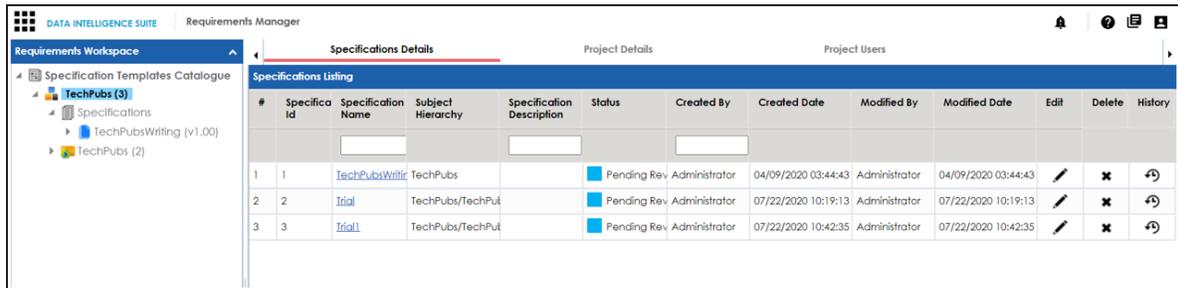
Use this option to update project name and its description. Alternatively, you can follow these steps:

1. In the Requirements Workspace pane, select a project.
2. Click the **Project Details** tab.
3. Click .

### **Delete Project**

Use this option to delete the project.

To view a list of project specifications, in the Requirements Workspace pane, select a project. The list of specifications under the project appears on the Specifications Details tab.



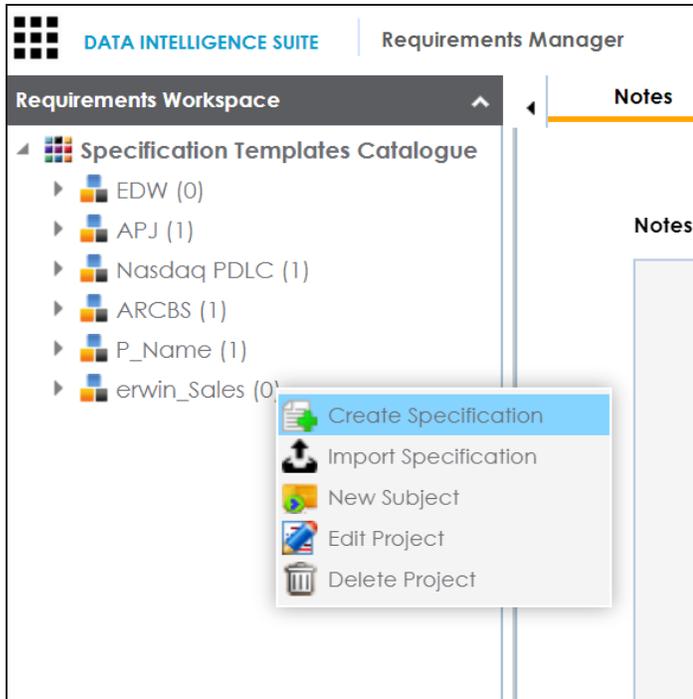
## Creating Specifications

Under each requirements project, you can add functional specifications that define the project, its purpose, and its goals. A project can contain multiple specifications. To create specifications, you can use existing templates or create a new one. For example, prerequisites and functional specifications.

You can create specifications using existing templates or create a new one. For more information on specification templates, refer to the [Creating Templates](#) topic.

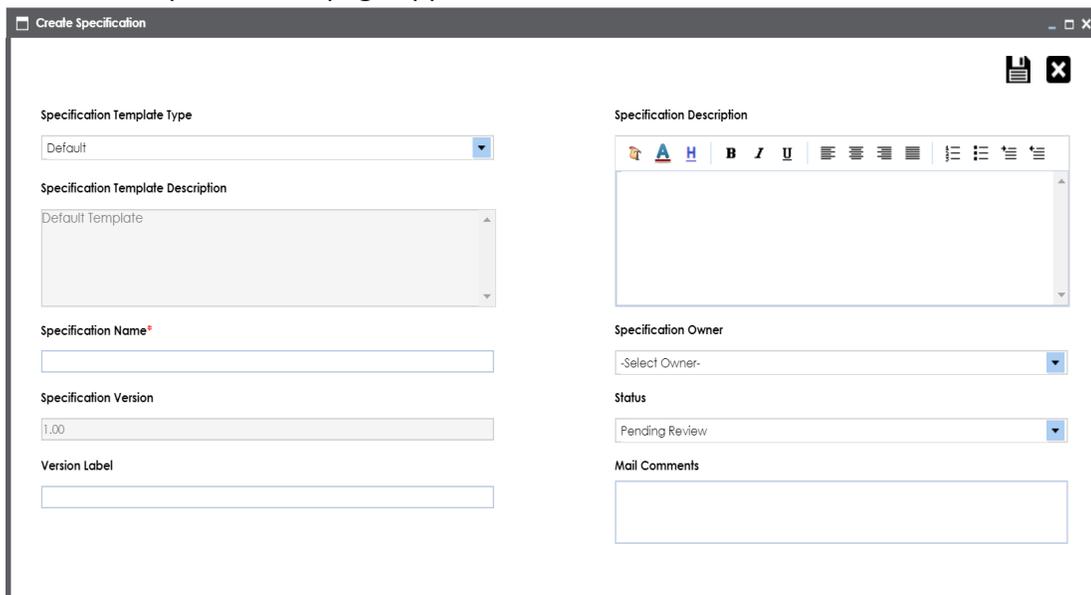
To create specifications, follow these steps:

1. Go to **Application Menu > Data Catalog > Requirements Manager**.
2. In the **Requirements Workspace** pane, right-click a project.



3. Click **Create Specification**.

The Create Specification page appears.



4. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Specification Template Type	Displays a list of available specification templates. Select an appropriate template. You can create templates and add artifacts to templates under <a href="#">Requirements Manager Settings</a> . For example, Health Migration Template.
Specification Template Description	Displays the selected specification template type's description. For example: The Health Migration Template is to capture functional and business requirements of the data migration project.
Specification Name	Specifies the name of the specification. For example, OrganMatch.
Specification Version	Specifies the version of the specification. For example, 1.01. Specification version is autopopulated. For more information on specification version, refer to the <a href="#">Configuring Version Display</a> topic.
Version Label	Specifies the version label of the specification. For example, Beta. For more information on specification version label, refer to the <a href="#">Configuring Version Display</a> topic.
Specification Description	Specifies the description of the specification. For example: The specification uses the Health Migration Template to capture functional and business requirements of the data migration project.
Specification Owner	Specifies the specification owner's name. For example, Jane Doe.
Status	Specifies the status of the specification. For example, Pending Review.
Mail Comments	Specifies mail comments that are sent to project users. For example: The specification uses the Health Migration Template.

Field Name	Description
	For more information on configuring email notifications, refer to the <a href="#">Configuring Email Settings</a> topic.

5. Click  .

A new specification is created and added to the Specifications tree.

A tree of artifacts appears under the specification node. These are the artifacts that were added to the selected specification template.

Once a specification is added to a project, you can enrich it further by:

- [Documenting requirements](#)
- [Adding supporting documents](#)
- [Setting up collaborations](#)
- [Creating child artifacts](#)

Right-click a specification in the Requirements Workspace pane to manage it. [Managing specifications](#) involves:

- Editing specifications
- Creating specification version
- Sharing specification link
- Exporting and importing specifications
- Copying specifications
- Deleting specifications

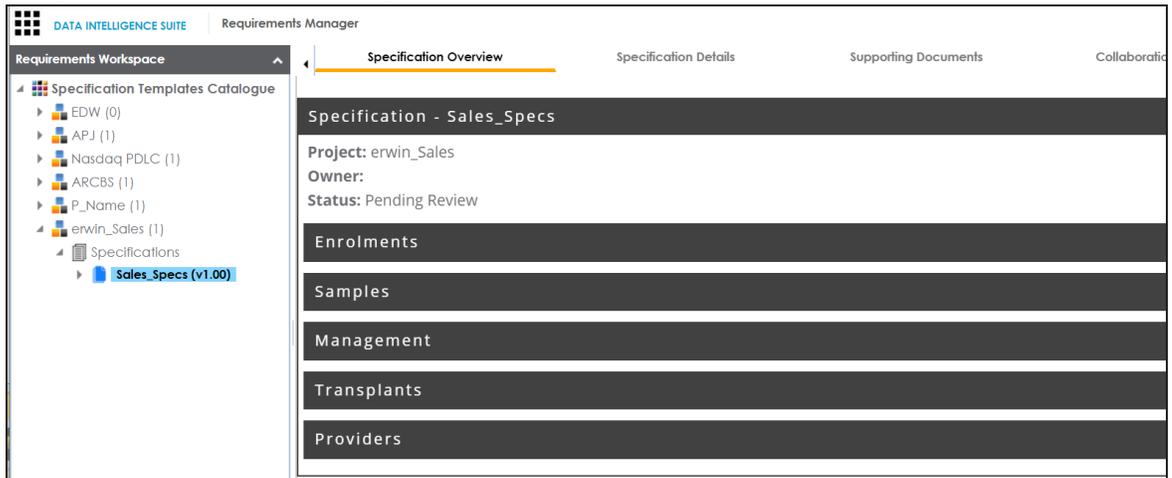
## Documenting Requirements

Based on the template that you use to create a specification, it contains one or more sections. These sections are called artifacts. You can document your requirements under these artifacts.

To document requirements, follow these steps:

1. In the **Requirements Workspace** pane, expand a project.
2. Select a specification.

The specification opens in a detailed view. The Specification Overview tab displays specification information and its artifacts. The artifacts available here are based on the template used to create the specification.



3. Hover over an artifact title and click .
4. Enter requirements in the text area and click .

Additionally, you can add child artifacts to an existing artifact. For more information, refer to the [Creating Child Artifacts](#) topic.

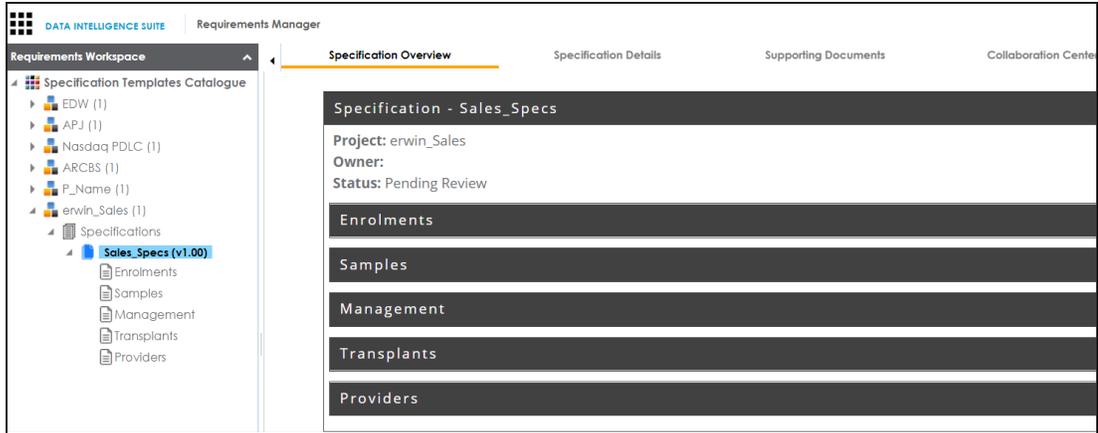
## Adding Supporting Documents

You can add supporting documents, such as text files, audio files, video files, document links, and so on to a specification.

To add supporting documents, follow these steps:

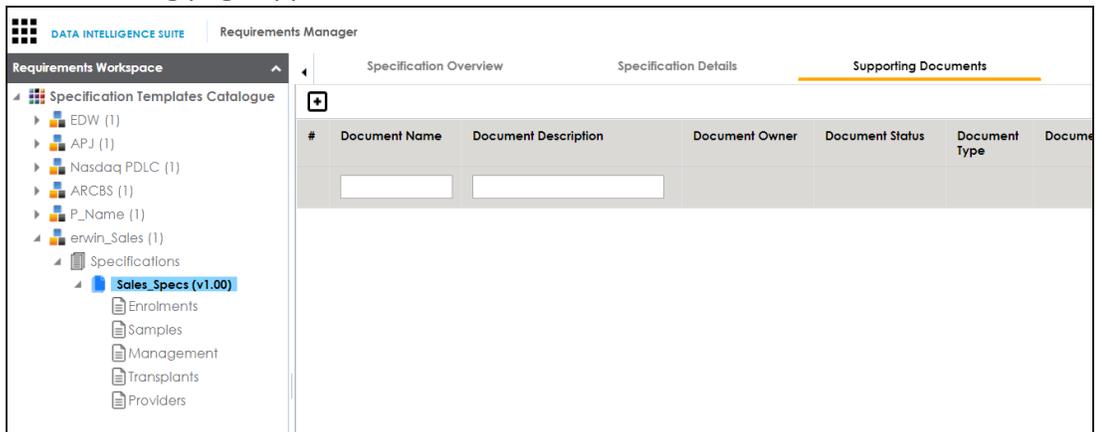
1. In the **Requirements Workspace** pane, select a specification.

The specification opens in a detailed view.



2. Click the **Supporting Documents** tab.

The following page appears.



3. Click .

The New Document Form page appears.

The screenshot shows a web form titled "New Document Form". It contains the following elements:

- Document Name\***: A text input field with a red asterisk indicating it is mandatory.
- Document Object**: A large area with the text "Drag-n-Drop files here or click to select files for upload." and a blue circular upload icon.
- Document Owner**: A text input field.
- Document Link**: A text input field.
- Document Description**: A rich text editor with a toolbar containing icons for text color, bold, italic, underline, bulleted list, numbered list, link, unlink, and undo. A "Center Alignment" button is visible within the editor area.
- Approval Required Flag**: A checkbox at the bottom left.

4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Document Name	Specifies the name of the document being attached to the specification. For example, Functional Requirements.
Document Object	Drag and drop document files or click  to select and upload document files.
Document Owner	Specifies the document owner's name.
Document Link	Specifies the URL of the document. For example, <a href="https://drive.google.com/file/d/2sC2_SZlYeFKI7OOn-b5YkMBq4ptA7jhG5/view">https://drive.google.com/file/d/2sC2_SZlYeFKI7OOn-b5YkMBq4ptA7jhG5/view</a>
Description	Specifies the description of the document. For example: The document contains a detailed record of the functional requirements of the data integration project.
Approval Required Flag	Specifies whether the document requires approval. Select the <b>Approval Required Flag</b> check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress.

Field Name	Description
	This field is available only when the <b>Approval Required Flag</b> check box is selected.

5. Click .

The document is added to the Supporting Documents list.

## Setting up Collaborations

You can start discussions on specifications or a relevant topic with your team using the Collaboration Center. This enables you and your team to work together.

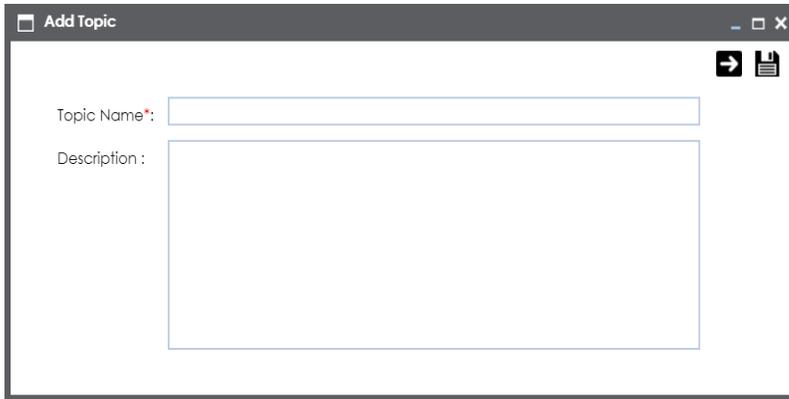
To set up collaborations, follow these steps:

1. In the **Requirements Workspace** pane, select a specification.  
The specification opens in the detailed view.
2. Click the **Collaboration Center** tab.



3. Click .

The Add Topic page appears.



4. Enter Topic Name and Description.

5. Click .

The User Assignment page appears.

6. Select the users or your team members that you want to collaborate with.

7. Click .

The topic is saved and added to the list of topics in the Collaboration Center. The topic is also added to the Collaboration Center of the users that you selected earlier.

Once you have created a new topic, you can manage them. [Managing collaborations](#) involves:

- Viewing topic details
- Editing topic details
- Assigning users
- Saving conversations as test
- Sending topics in an email
- Deleting topic
- Restoring or purging topics

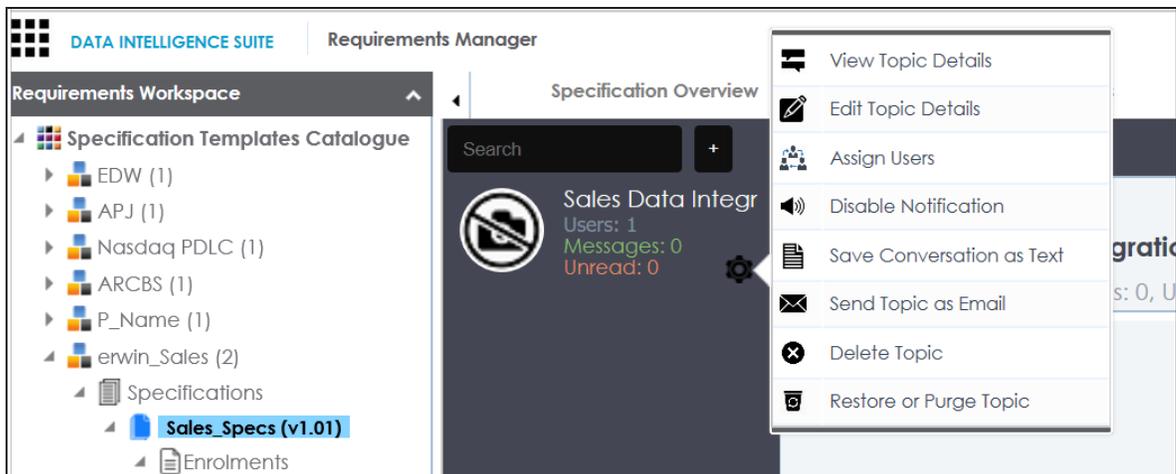
## Managing Collaborations

Managing collaborations involves:

- Viewing topic details
- Editing topic details
- Assigning users
- Saving conversations as test
- Sending topics in an email
- Deleting topic
- Restoring or purging topics

To manage collaborations, follow these steps:

1. In the **Requirements Workspace** pane, select a specification.  
The Specification Overview page appears.
2. Click **Collaboration Center** tab.
3. Click .



4. Use the following options:

#### **View Topic Details**

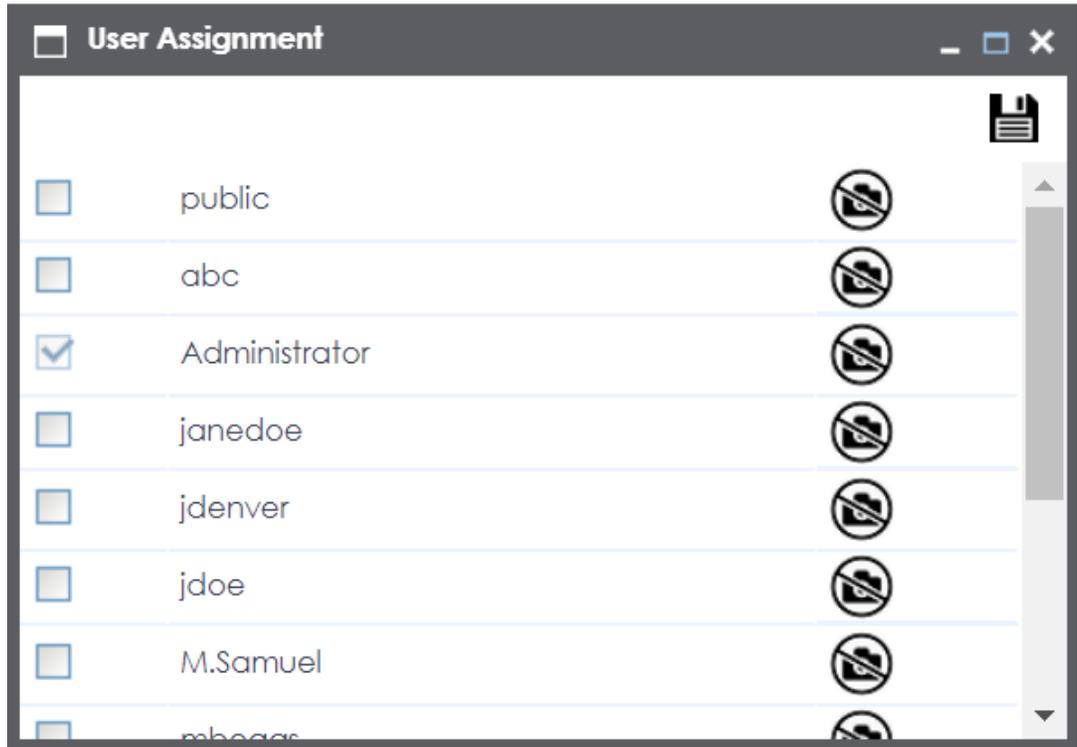
Use this option to view the topic and its information, such as the creator, the creation date and time, and the modification date and time.

#### **Edit Topic Details**

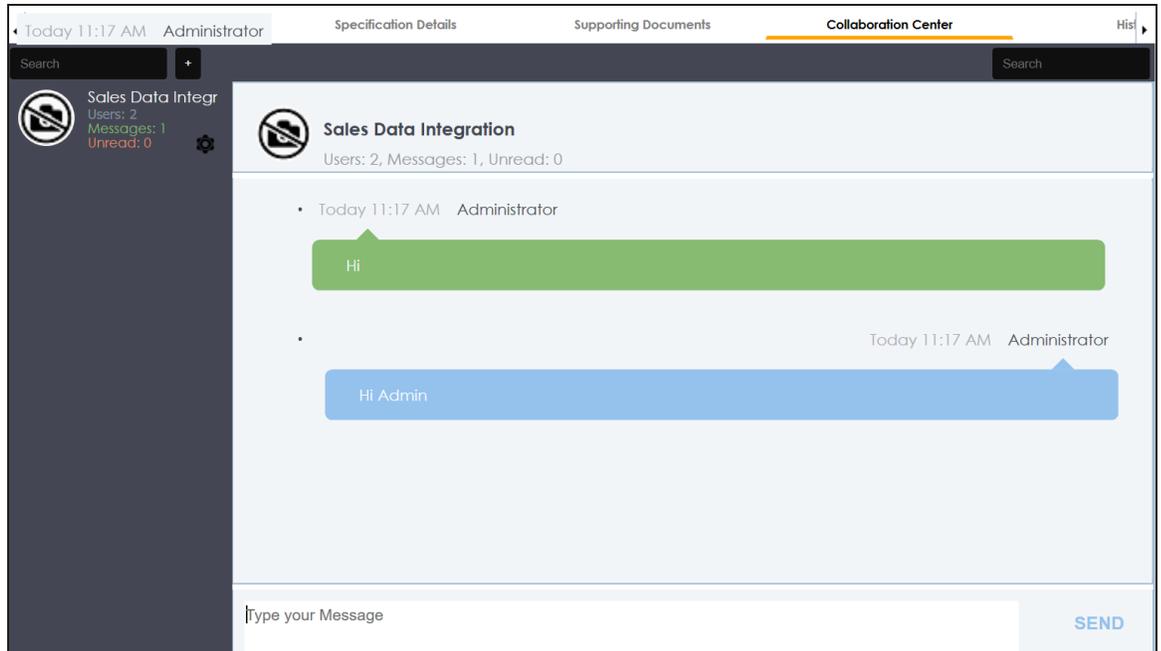
Use this option to edit the topic name and description to enrich it further.

## Assign Users

Use this option to assign additional users to collaborate with you and contribute to the topic.



Select one or more users and then click . The selected users are assigned to the topic and collaborate with each other.



### Save Conversation as Text

Use this option to save the conversation to a .txt file.

### Send Topic as Email

Use this option to send the topic and its conversations in an email. Clicking Send Topic as Email opens an email recipient list, where you can select one or multiple recipients. Click  to send an email to the selected recipients.

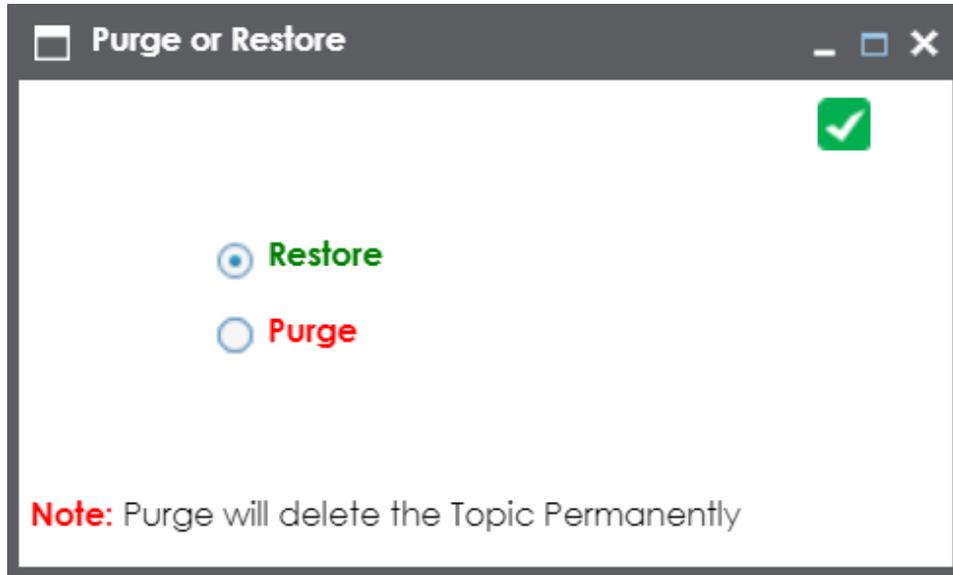
### Delete Topic

Use this option to delete the topic. The topic is deleted for all the assigned users.

 Any assigned user can delete the topic.

### Restore or Purge Topic

The deleted topic can be restored or deleted permanently (Purge). Click **Restore or Purge Topic**.



To restore the topic, click **Restore** and then, click .

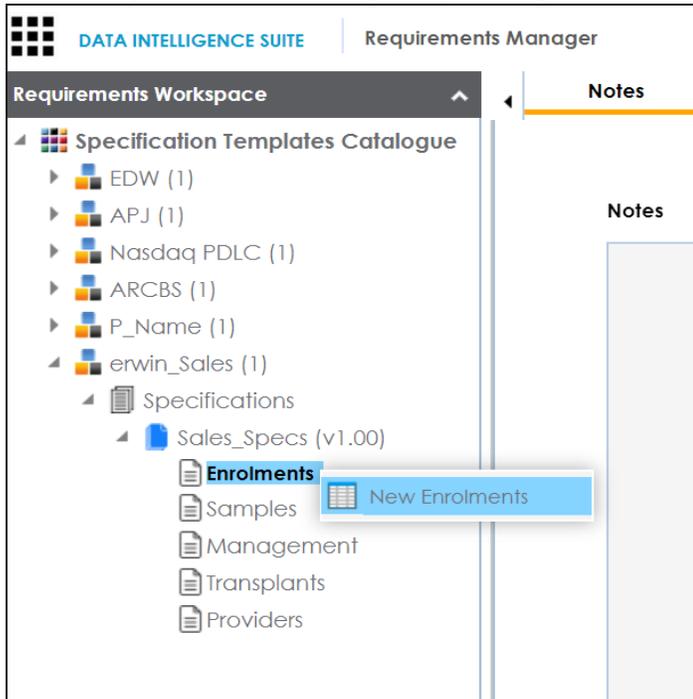
To delete the topic permanently, click **Purge** and then, click .

## Creating Child Artifacts

To create better structured specifications and to enrich them further, you can create multiple child artifacts under an artifact.

To create child artifacts, follow these steps:

1. In the **Requirements Workspace** pane, right-click an artifact.



2. Click **New <Artifact\_Name>**.

The New Specification Artifact page appears.

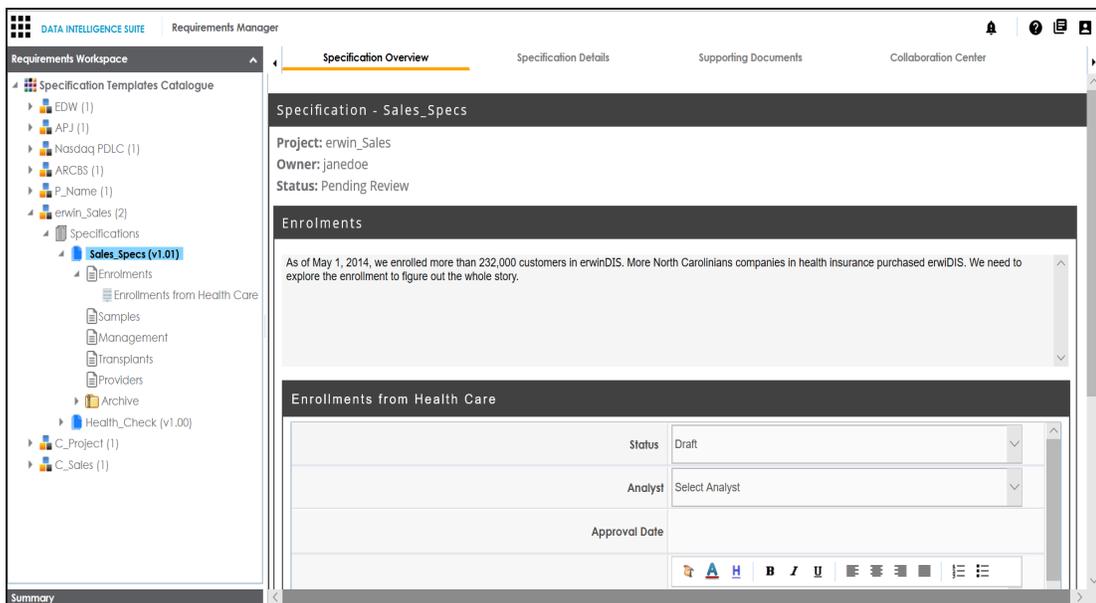
The screenshot shows the 'New Specification Artifact' form. It has a title bar with the text 'New Specification Artifact' and standard window controls. The form contains three main sections: 'Name\*' with a text input field; 'Description' with a rich text editor toolbar and a large text area; and 'Mail Comments' with a text input field. The 'Name\*' field is marked with a red asterisk, indicating it is mandatory.

3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Name	Specifies the name of the child artifact. For example, Enrollments from Healthcare.
Description	Specifies the description of the child artifact. For example: The child artifact captures functional requirements of the healthcare department. This field can be disabled while <a href="#">adding the artifact to the template</a> .
Mail Comments	Specifies the mail comments that are sent to the project users. For example: This child artifact is under the Enrollments artifact. For more information on sending mail comments to project users, refer to the <a href="#">Configuring Email Settings</a> topic.

4. Click .

A child artifact is saved and added to the artifact tree. You can view the child artifact on the Specification Overview tab.



The screenshot shows the 'Requirements Manager' application with the 'Specification Overview' tab selected. The left sidebar displays a tree view of 'Specification Templates Catalogue' with 'Sales\_Specs (v1.01)' expanded to show 'Enrollments' and 'Enrollments from Health Care'. The main content area shows the 'Specification - Sales\_Specs' details, including project information (Project: erwin\_Sales, Owner: janedoe, Status: Pending Review) and a text description under 'Enrolments'. Below this, there is a table for 'Enrollments from Health Care' with columns for Status (Draft), Analyst (Select Analyst), and Approval Date. A rich text editor toolbar is visible at the bottom of the content area.

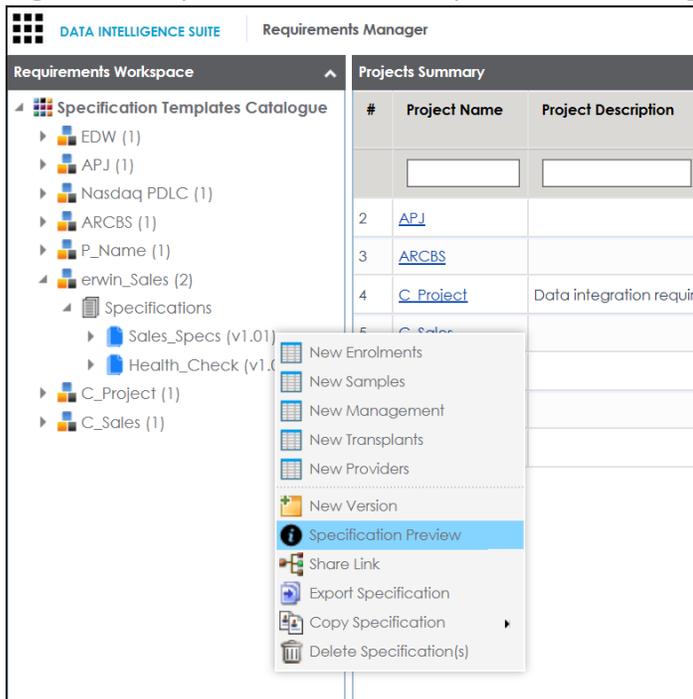
# Managing Specifications

You can preview the specifications and manage them. Managing specifications involves:

- Editing specifications
- Creating specification version
- Sharing specification link
- Exporting and importing specifications
- Copying specifications
- Deleting specifications

To manage specifications, follow these steps:

1. Right-click a specification to view specification management options.



2. Use the following options:

## **New Version**

Use this option to create specification versions. You can maintain one working version and archive older versions for reference. For more information, refer to the [Creating Specification Version](#) topic.

### **Specification Preview**

Use this option to preview the specification.

### **Share Link**

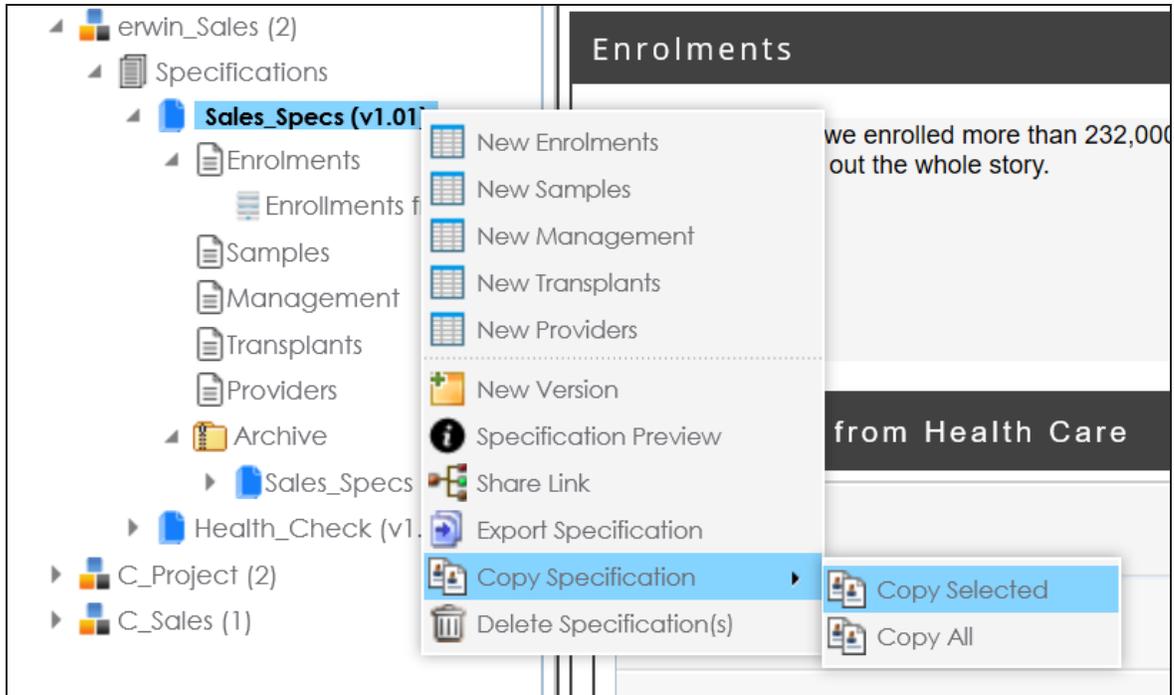
Use this option to generate a sharable specification URL. You can copy the URL to share or send the URL through an email using an email client.

### **Export Specification**

Use this option to download a specification in .xml format. You can use the downloaded specification to import it to another project. For more information, refer to the [Exporting and Importing Specifications](#) topic.

### **Copy Specification**

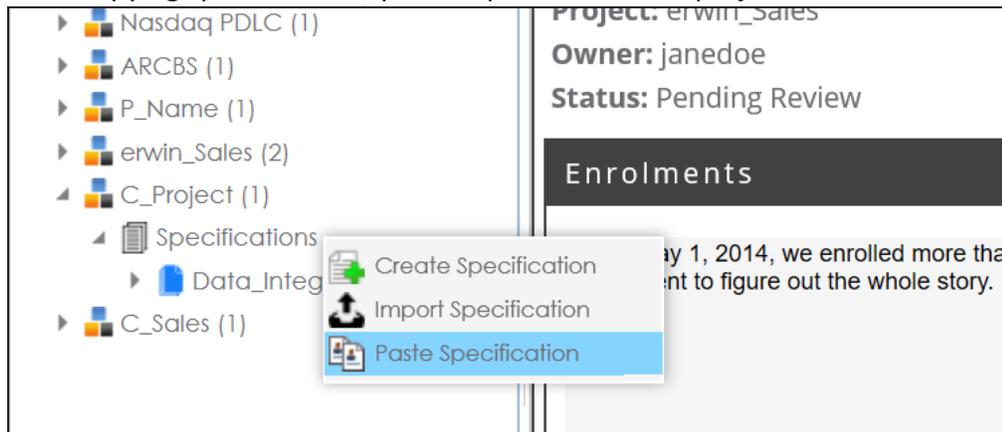
Use this option to copy specifications.



Use one of the following options:

- **Copy Selected:** Use this option to copy the selected specifications.
- **Copy All:** Use this option to copy the specification and its archived versions.

After copying specifications, you can paste them in a project.



**Delete Specification**

Use this option to delete specifications. You can also delete all the versions of the specification using this option.

### Edit Specifications

Use this option to edit the specification. To edit specification, select a specification and click . Then, update the specification and save the changes.

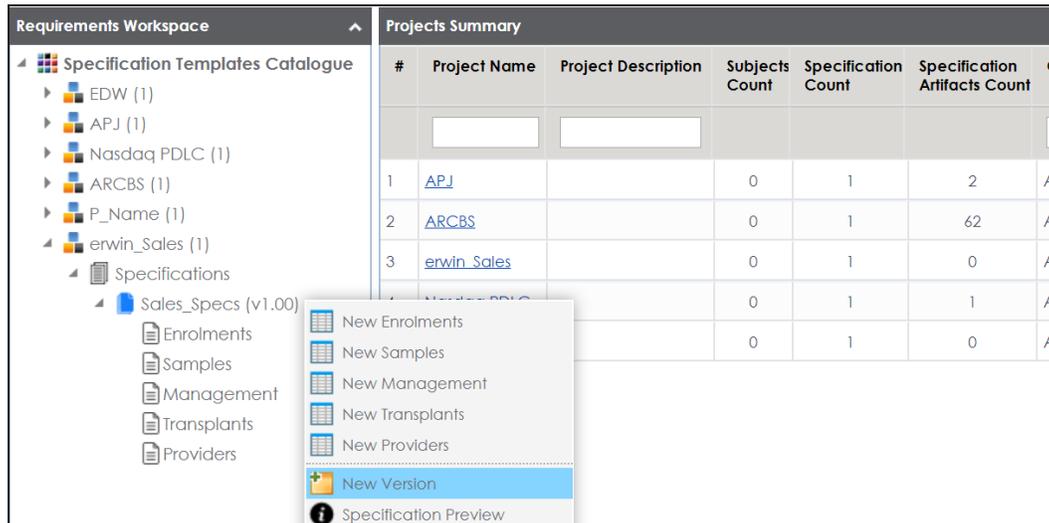
1. Click the **Specifications** node.  
The specification Listing page appears.
2. Click .  
The Specification Details page appears in edit mode.
3. Update the required fields and click .  
The specification is updated.

## Creating Specification Versions

You can create versions of a specification, and maintain one working version and archive the older versions for reference. You can also compare any two versions of the specifications to view differences.

To create specification versions, follow these steps:

1. In the **Requirements Workspace** pane, right-click the required specification.



The screenshot shows the 'Requirements Workspace' pane on the left and a 'Projects Summary' table on the right. The 'Projects Summary' table has the following data:

#	Project Name	Project Description	Subjects Count	Specification Count	Specification Artifacts Count	C
1	<a href="#">APJ</a>		0	1	2	Ac
2	<a href="#">ARCBS</a>		0	1	62	Ac
3	<a href="#">erwin Sales</a>		0	1	0	Ac
4	<a href="#">Nasdaq PDLC</a>		0	1	1	Ac
5	<a href="#">erwin Sales</a>		0	1	0	Ac

The context menu for 'Sales\_Specs (v1.00)' includes the following options:

- New Enrolments
- New Samples
- New Management
- New Transplants
- New Providers
- New Version**
- Specification Preview

2. Click **New Version**.

The New Version page appears.

3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Specification Name	Specifies the name of the specification. For example, OrganMatch.
Specification Version	Specifies the new version of the specification. For example, 1.02.
Version Label	Specifies the version label of the specification. For example, Beta. For more information on configuring version display of specifications, refer to the <a href="#">Configuring Version Display of Specifications</a> topic.
Change Description	Specifies the description of the changes made in the specifications. For example: A new child artifact was added to the specification tem-

Field Name	Description
	plate.
Mail Comments	Specifies the mail comments which are sent to the project users. For example: The new version of the specification contains one more child artifact. For more information on sending mail comments to project users, refer to the <a href="#">Configuring Email Settings</a> topic.

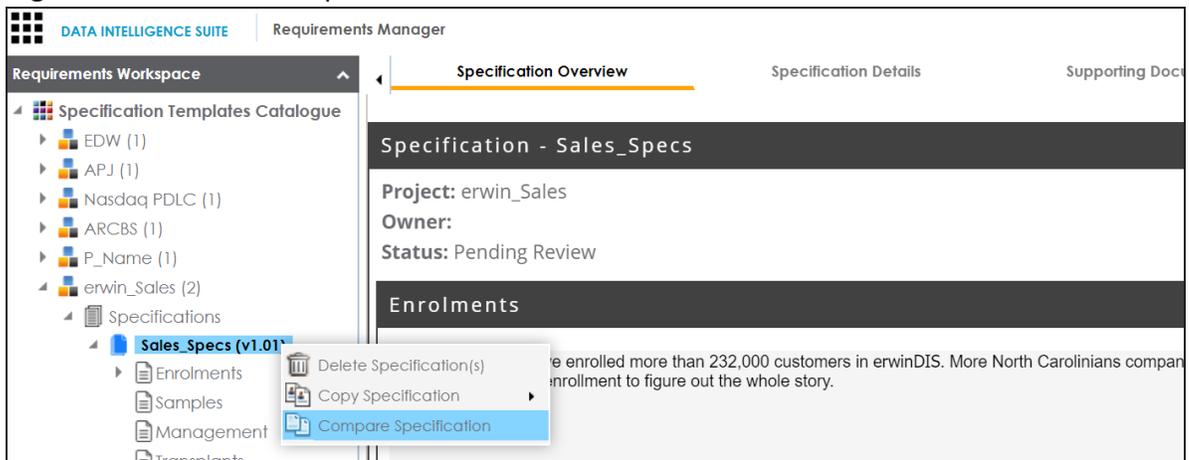
4. Click .

A version of the specification is created and added to the Specifications tree.

The older specification version is archived and cannot be edited.

To compare the two versions of a specification, follow these steps:

1. In the **Requirements Workspace** pane, use the CTRL key to select the two versions that you want to compare.
2. Right-click the selected specification.



3. Click **Compare Specification**.

The Specification Comparison Report appears. This report displays a comparison of two specifications.

For example, the differences are highlighted in red color and unchanged details are displayed in black color. See the below image for more information.

Specification Comparison Report		Date:
	11/07/2019	
<b>Specification:</b>	Sales_Specs	Sales_Specs
<b>Project:</b>	erwin_Sales	erwin_Sales
<b>Owner:</b>		
<b>Status:</b>	Pending Review	Pending Review
<b>Template:</b>	Health Migration Template	Health Migration Template
<b>Version:</b>	1.01	1.00
<b>Enrolments</b>		
	Enrollments from Health Care:	
	Status: Draft	
	Analyst: Select Analyst	
	Approval Date:	
	External Documentation Reference:	
	Comments:	
<b>Samples</b>		
<b>Management</b>		
<b>Transplants</b>		
<b>Providers</b>		

Color Representation

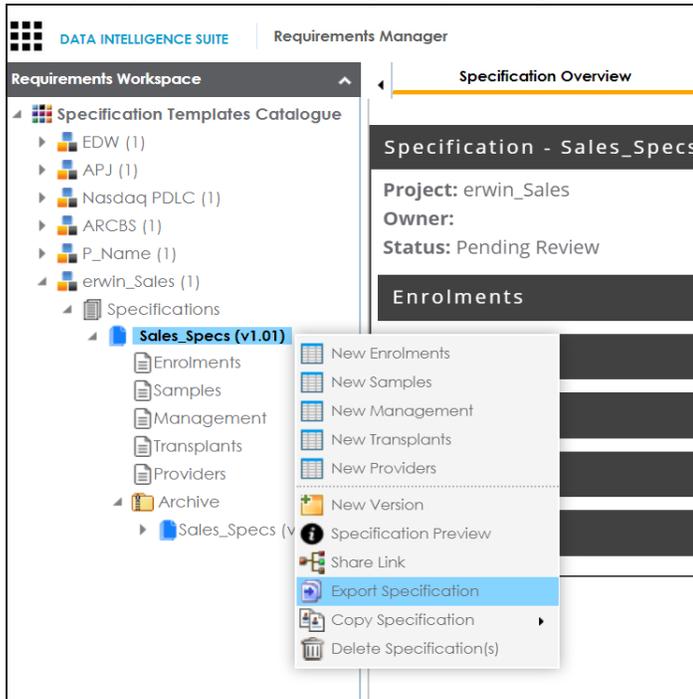
- Changed Presentation
- Unchanged Presentation

## Exporting and Importing Specifications

You can export specifications in .xml format and import them to the a same or different project.

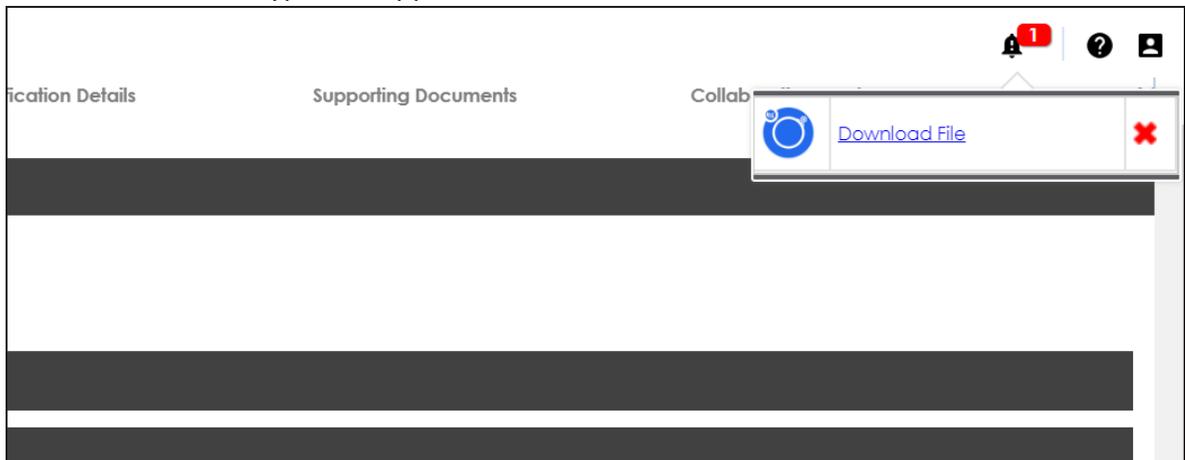
To export specifications, follow these steps:

1. In the **Requirements Workspace** pane, right-click the required specification.



2. Click **Export Specification**.

The Download File hyperlink appears in the notification area.



3. Click **Download File**.

The specification is downloaded as a .zip file.

You can create a specification by importing the exported specification.

To import a specification, follow these steps:

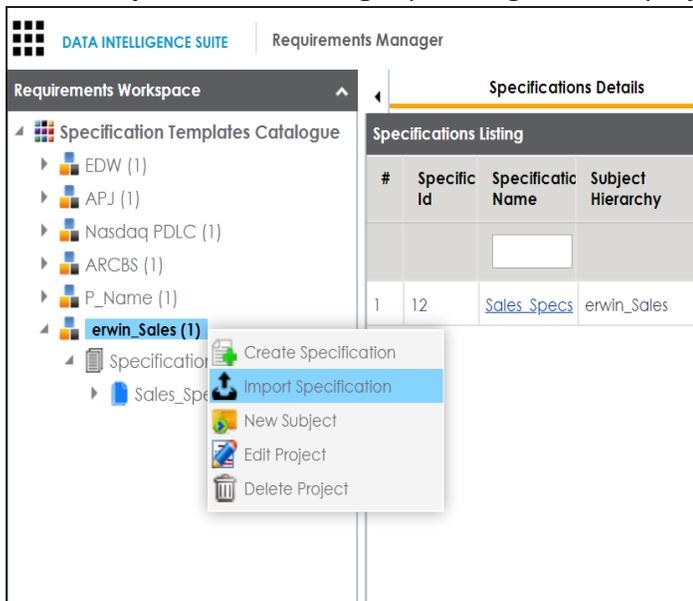
1. Unzip the exported specification.

The unzipped folder contains the exported specification in the .xml format.



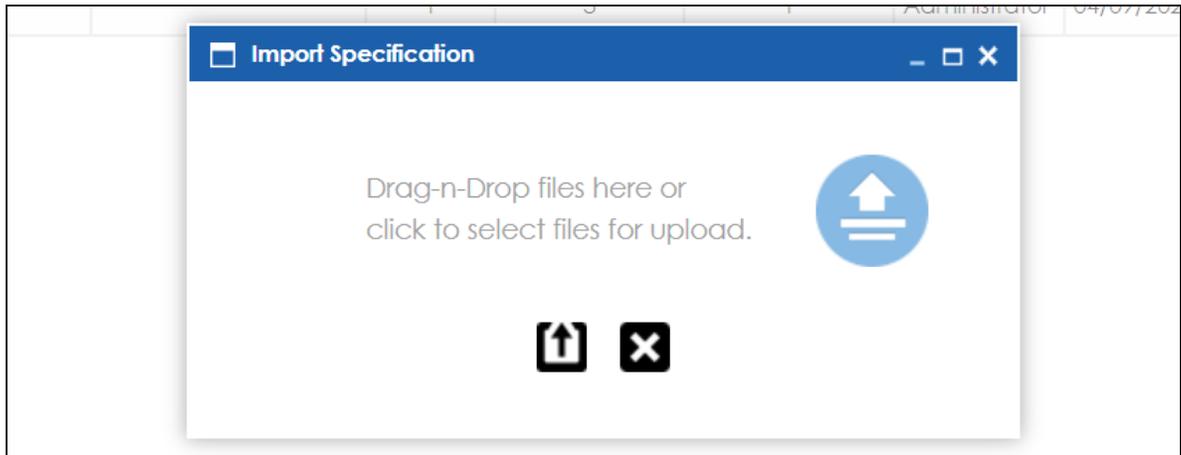
If you are importing the specification to the same project, then change the Specification Name and the Template Name in the .xml file. If you are importing the specification to a different project, you can import the .xml file as it is.

2. Go to **Application Menu > Data Catalog > Requirements Manager**.
3. In the **Requirements Manager** pane, right-click a project.



4. Click **Import Specification**.

5. Drag and drop the .xml file or use  to browse the file.



6. Click .

The specification is created and added to the Specifications tree.

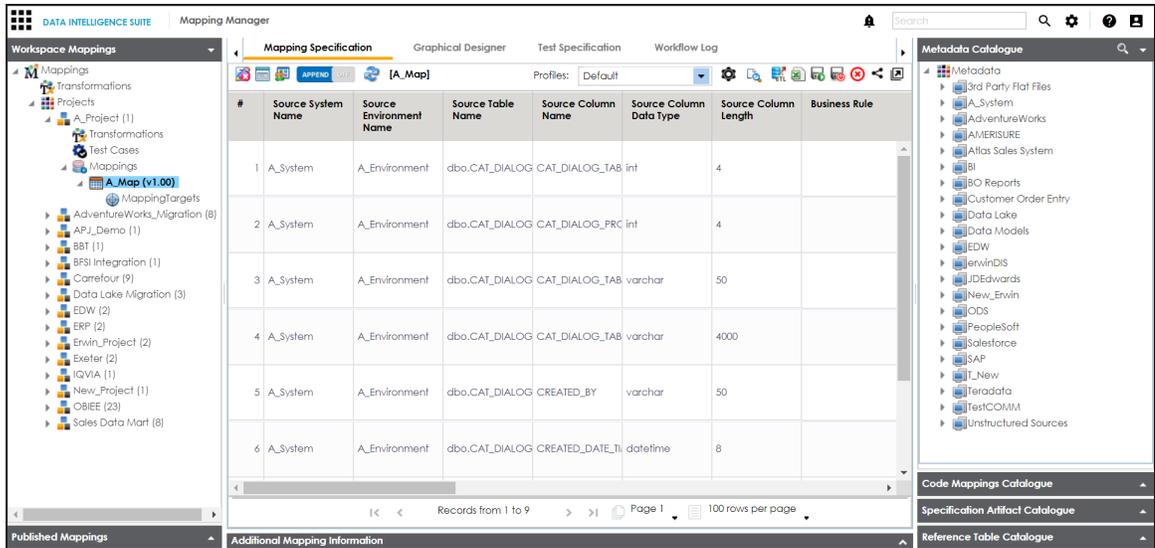
## Linking Requirements to Data Mappings

To ensure enterprise-wide traceability, you can link your functional requirements to data mappings.

To link functional requirements to mappings, follow these steps:

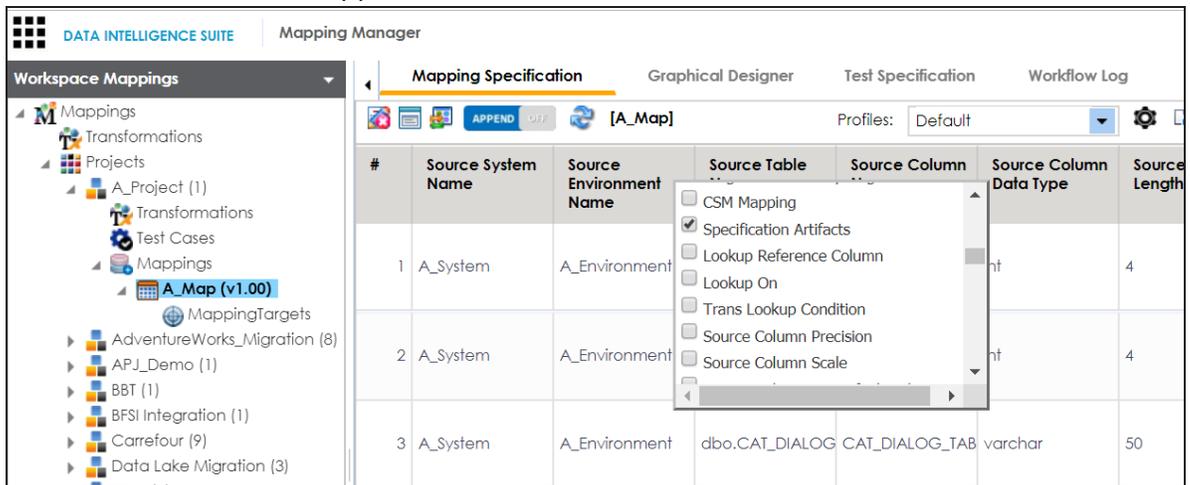
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Click a mapping.

The mapping opens in the detailed view.



3. On the **Mapping Specification** tab, right click the grid header.

A list of header columns appears.



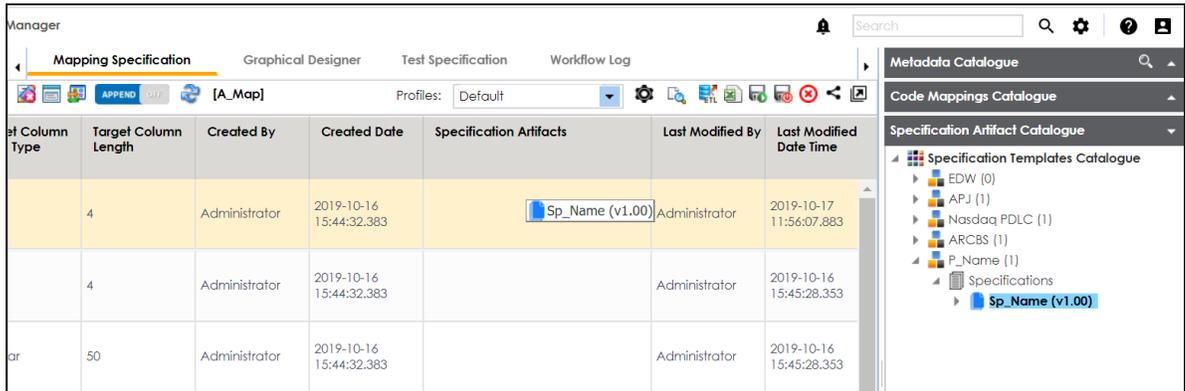
4. Scroll down the list and select the **sSpecification Artifact** check box.

The specification Artifact column becomes visible on the Mapping Specification tab.

5. In the right pane, click **Specification Artifact Catalogue**.

6. Expand the project that contains the required specification.

7. Drag and drop the specification on the **Specification Artifacts** column in the required row.



8. Click .

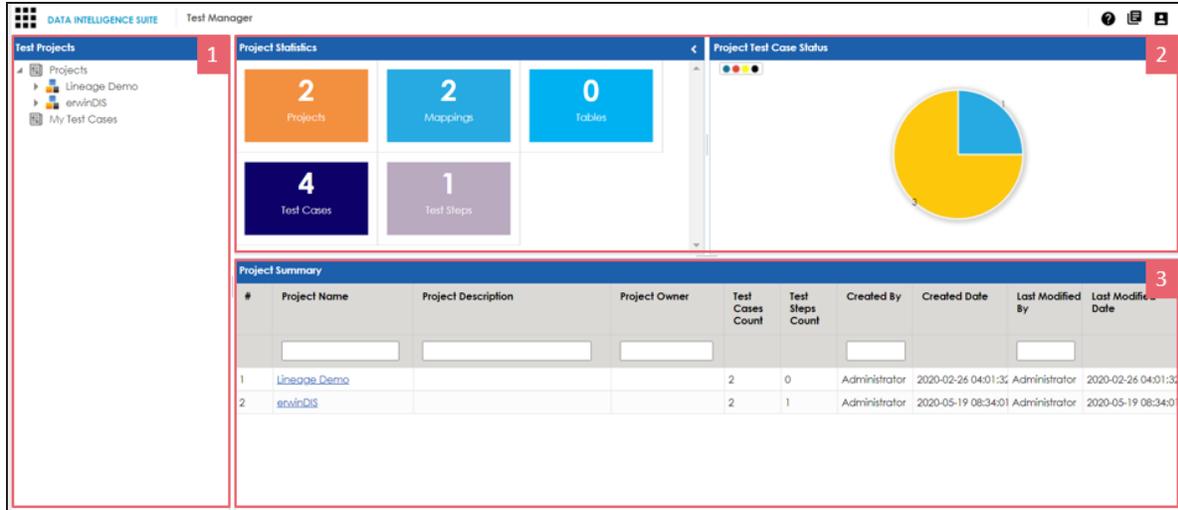
Requirements are linked to the selected mapping.

## Using Test Manager

The Test Manager enables you to view and analyze test cases across projects and metadata levels. It provides a dashboard with the project and test cases statistics that help you manage your test cases.

To access the Test Manager, go to **Application Menu > Data Catalog > Test Manager**.

The Test Manager dashboard appears:



UI Section	Function
1-Test Projects	Use this pane to browse through test cases created in the Metadata Manager and the Mapping Manager. Test cases are listed under projects.
2-Right Pane	Use this pane to view project and test case statistics, and test case status for projects.
3-Project Summary	Based on your selection in the Test Projects pane, use this pane to view a list of projects or test cases.

Once you have created test cases in the Mapping Manager and Metadata Manager, you can [view and analyze](#) them in the Test Manager.

## Creating and Managing Test Cases

You can create, edit, and clone the test cases for project maps, tables, ETL processes: then define actual and expected results. You can also import and export test cases in the XLS format.

For more information on creating test cases, refer to the following topics:

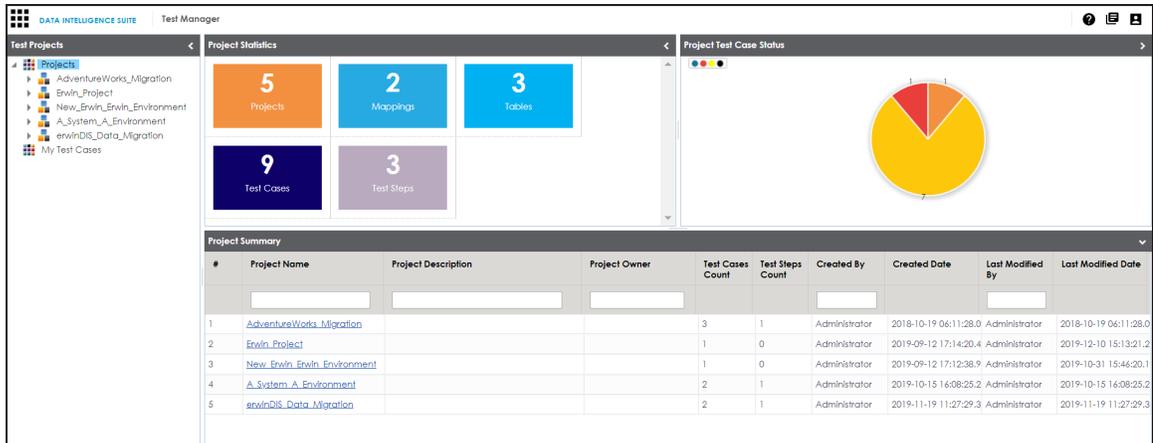
- [Creating and Managing Test Cases for Mappings](#)
- [Creating and Managing Test Cases for Tables](#)

# Viewing and Analyzing Test Cases

You can view and analyze all the test cases created in the Mapping Manager and Metadata Manager at one place in the Test Manager.

To view and analyze test cases, follow these steps:

1. Go to **Application Menu > Data Catalog > Test Manager**.



The following information about the selected project is displayed in the right pane.

## Project Statistics

Use this section to view the following information:

**Projects:** It displays the number of projects in the Test Manager.

**Mappings:** It displays the number of mappings with at least one map-level test case.

**Tables:** It displays the number of tables with at least one metadata-level test case.

**Test Cases:** It displays the count of total number of test cases in the Mapping Manager and Metadata Manager.

**Test Steps:** It displays the total count of validation steps in all the test cases.

## Project Test Case Status

Use this section to view the test case statuses in a pie chart. The test case status can be:

- Passed
- Failed
- Unspecified
- Need Analysis
- No Run
- Design

## Project Summary

Use this section to displays the list of projects The Project names follow a nomenclature:

- Projects containing metadata level test cases follow, <System Name>\_<Environment Name>
- Projects containing project level test cases and map level test cases have the same name as that of the project in the Mapping Manager

The metadata-level test cases are created in the Metadata Manager. The project-level and map-level test cases are created in the Mapping Manager.

2. In the Test Projects pane, click a project.

The screenshot shows the Test Manager interface with the following components:

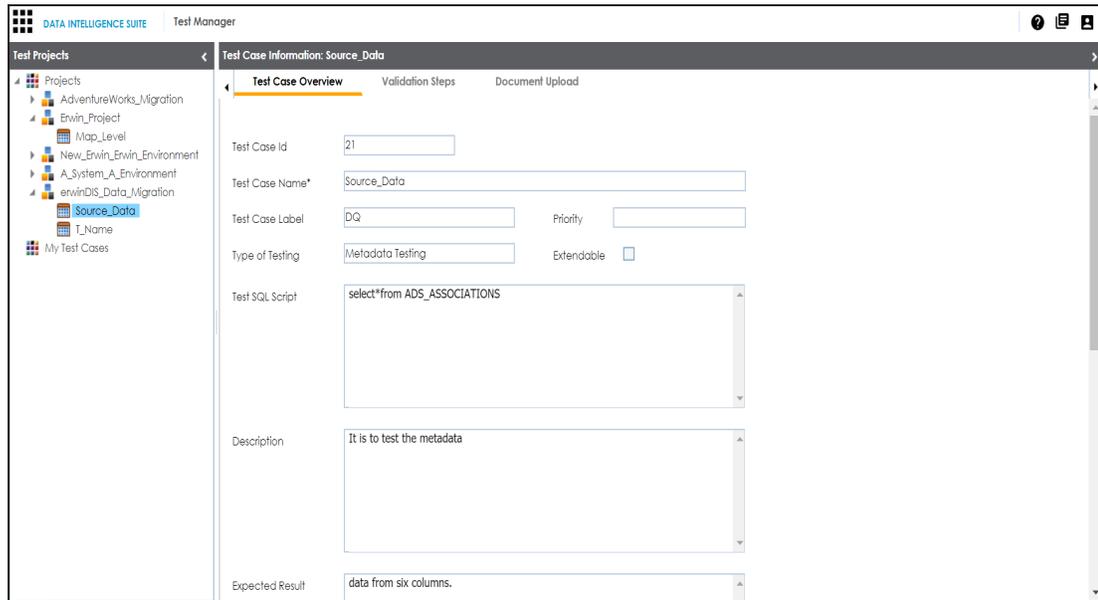
- Test Projects Pane:** A tree view on the left showing a hierarchy of projects including 'AdventureWorks\_Migration', 'Erwin\_Project', 'Map\_Level', 'New\_Erwin\_Erwin\_Environment', 'A\_System\_A\_Environment', 'erwinDIS\_Data\_Migration' (selected), 'Source\_Data', 'T\_Name', and 'My Test Cases'.
- Test Case Statistics:** Three summary cards showing '1 Tables', '2 Test Cases', and '1 Test Steps'.
- Test Case Status:** A circular gauge chart showing a yellow segment representing the status of test cases.
- Test Case Summary Table:** A table with columns: #, Test Case Id, Test Case Name, Test Case Label, Type of Testing, Description, Priority, and Test Case Status. It lists two test cases:
 

#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status
1	21	Source_Data	DG	Metadata Testing	It is to test the metadata		
2	22	T_Name					

**Test Case Statistics, Test Case Status, and Test Case Summary** are displayed in the right pane.

3. Click a test case to view its details.

The test case opens in a detailed view.



Work on the following tabs to view and analyze the test cases:

### Test Case Overview

Use this tab to view the test case details.

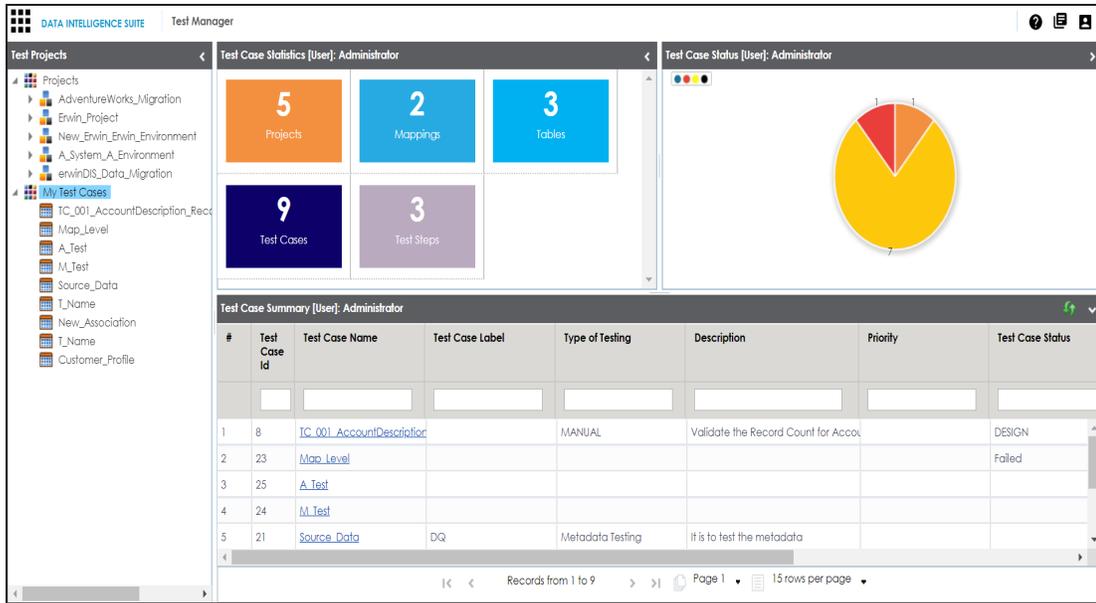
### Validation Steps

Use this tab to view the validation steps in the test case.

### Document Upload

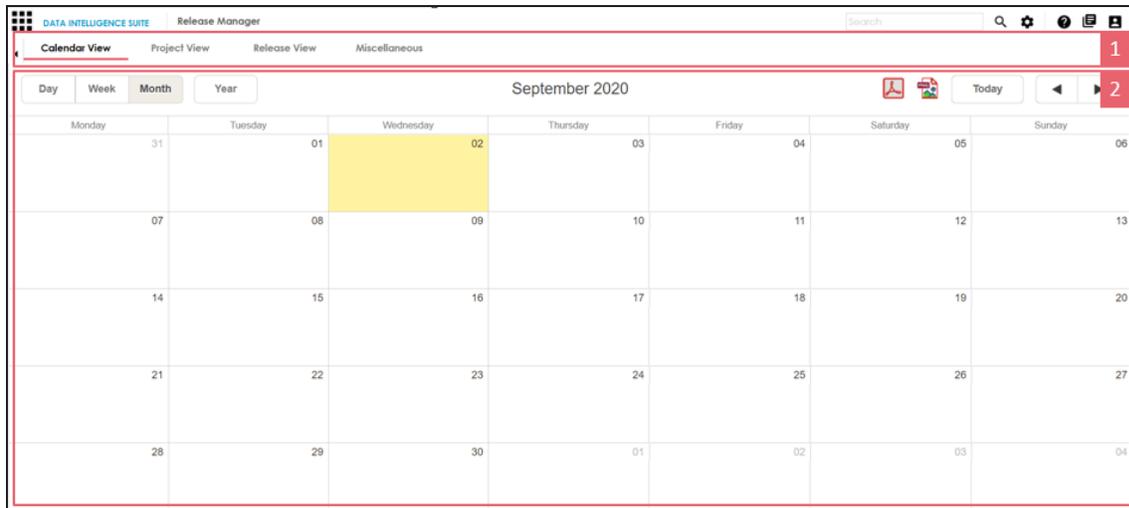
Use this tab to view the uploaded documents in the test case.

Expand **My Test Cases** node to browse the test cases you (logged in user) created.



## Using Release Manager

To access the Release Manager, go to **Application Menu > Data Catalog > Release Manager**. The Release Manager dashboard appears:



UI Section	Function
1-Browser Pane	Use this pane to browse through releases and miscellaneous options. You can switch between different views to see releases:

	<ul style="list-style-type: none"> <li>▪ <b>Calendar View:</b> Select this view to list the releases on a calendar</li> <li>▪ <b>Project View:</b> Select this view to list the releases under a project.</li> <li>▪ <b>Release View:</b> Select this view to list release object details under a release.</li> </ul>
2-Bottom Pane	Use this pane to view or work on the data based on your selection in the browser pane.

Managing releases involve the following:

- [Creating projects and adding releases](#)
- [Adding release objects to releases](#)
- [Moving release objects](#)
- [Sorting projects and releases](#)

## Creating Projects and Adding Releases

You can create projects and add releases to these projects.

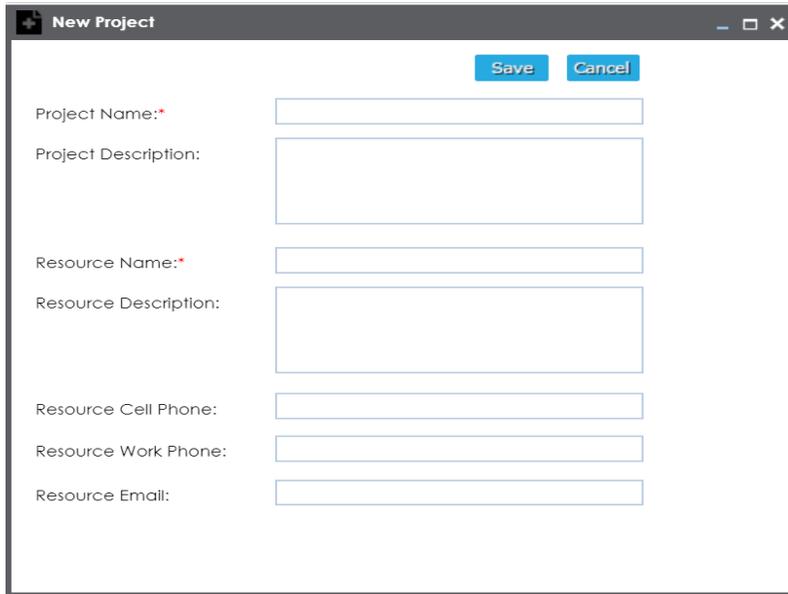
To create projects, follow these steps:

1. On the **Release Manager** page, click the **Project View** tab.

The screenshot displays the Release Manager interface. At the top, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the tabs is a 'Project Listing' table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table shows two projects: 'EDW' and 'New\_Project'. Below the project listing is a 'Release Listing for: EDW' table with columns: #, Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. This table shows four releases, all with a status of 'PENDING APPROVAL'. On the right side, there are two summary charts: 'Release Summary - By Status' showing 100% 'PENDING APPROVAL' and 'Release Summary - By Owner' showing a distribution of 50% for 'ks123', 25% for 'janedoe', and 25% for 'Unassigned'. The interface also includes a search bar, settings icons, and a footer with pagination information.

2. Click **Add Project**.

The New Project page appears.



3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Project Name	Specifies the name of the project. For example, EDW.
Project Description	Specifies the description about the project. For example: List of releases targeted this spring.
Resource Name	Specifies the project owner's name. For example, Jane Doe.
Resource Description	Specifies the description about the project owner. For example: Jane Doe is the release manager of the organization.
Resource Cell Phone	Specifies the cell phone number of the project owner. For example, +658374414288.
Resource Work	Specifies the work phone number of the project owner.

Field Name	Description
Phone	For example, 1-800-783-7946.
Resource Email	Specifies the project owner's email address. For example, jane.doe@mauris.edu

4. Click **Save**.

The project is created and saved in the Project Listing.

To add releases to the project, follow these steps:

1. Under the **Project Listing** section, select a project.

The Release Listing for the project appears under the **Release Listing for:** section.

If there are not release associated to a project, the list will be empty.

The screenshot shows the 'Release Manager' interface. At the top, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the tabs, there are buttons for 'Add Project', 'Export to Excel', and 'Share'. The main area is divided into two sections:

**Project Listing:** This section contains a table with the following columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table lists three projects:

#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
1	EDW	Kartik Sridhar	11/28/2019	4	6	Administrator	10/18/2018		[Edit] [Download] [Delete] [Refresh]
2	New_Project	Resource_Name	10/17/2019	2	1	Administrator	09/11/2019		[Edit] [Download] [Delete] [Refresh]
3	Project_Name	Joe Villers	11/28/2019	0	0	Administrator	11/28/2019		[Edit] [Download] [Delete] [Refresh]

**Release Listing for : Project\_Name:** This section contains a table with the following columns: #, Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. The table is currently empty.

2. Click **Add Release**.

The New Release page appears.

The screenshot shows a 'New Release' form with the following fields:

- Project Name\*: Project\_Name (dropdown)
- Release Name\*: (text)
- Release Description: (text)
- Change Control Number: (text)
- Release Date\*: 11/28/2019 (calendar icon)
- Release Owner: -Select- (dropdown)
- User Defined Field 1 through 10: (text)

Buttons: Save, Cancel

3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Project Name	Specifies the project name for a release. For example, EDW.
Release Name	Specifies the name of the release. For example, Pfizer Test.
Release Description	Specifies the description about the release. For example: The release contains two release objects of the data item type.
Change Control Number	Specifies the change control number of the release. For example, v1.8.
Release Date	Specifies the date of the release. For example, 01/22/2020. Use  to enter the release date.
Release Owner	Specifies the release owner's User ID. For example, jdoe.

Field Name	Description
	This list displays the users available in the Resource Manager. For more information on creating users, refer to <a href="#">Creating Users and Assigning Roles</a> .
User Defined Fields (1-10)	Specifies the UI label name of additional. You can define the UI labels in the <a href="#">Language Settings</a> .

4. Click **Save**.

The release is added to the selected project.

The screenshot displays the Release Manager interface. At the top, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the tabs is a search bar and utility icons. The main area is divided into two sections: 'Project Listing' and 'Release Listing for: Project\_Name'. The 'Project Listing' table has columns for #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The 'Release Listing' table has columns for #, Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. On the right side, there are two summary charts: 'Release Summary - By Status' showing a 100% 'PENDING APPROVAL' status, and 'Release Summary - By Owner' showing an 'Unassigned' status. The bottom of the interface shows pagination information: 'Records from 1 to 1', 'Page 1', and '10 rows per page'.

5. Use the following options:

**View (👁)**

To view the release details, click 👁.

**Edit (✎)**

To edit the release, click ✎.

You can update the [release status](#) only by editing a release.

**Download (📄)**

To download the release details, click 📄.

### Delete (✕)

To delete the release, click ✕.

Once a release is created, you can [add release objects](#) to it.

## Adding Release Objects to Releases

You can add following release objects to releases:

- [Data item mappings](#)
- [Codesets](#)
- [Code mappings](#)
- [Miscellaneous objects](#)



You can add new release object types under the Miscellaneous Objects list in the [Release Manager Settings](#).

## Adding Data Item Mappings as Release Objects

Data item mappings can be added as release objects to a release. While adding a data item mapping, ensure that the mapping is not in edit mode (locked state).

To add data item mappings as release objects to a release, follow these steps:

1. Under the **Project View** tab, in the **Project Listing** section click the required project.

The release listing of the project appears.

DATA INTELLIGENCE SUITE Release Manager

Calendar View **Project View** Release View Miscellaneous

Project Listing: Add Project Export to Excel Share

#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
1	EDW	Kartik Sridhar	11/29/2019	4	6	Administrator	10/18/2018		
2	New_Project	Resource_Name	10/17/2019	2	1	Administrator	09/11/2019		
3	Project_Name	Joe Villers	11/28/2019	1	0	Administrator	11/28/2019		

Project Details

Project\_Name

Description:

Resource Name: Joe Villers

Resource Email:

Release Summary - By Status

Release Summary - By Owner

Release Listing for : Project\_Name Add Release Generate Release Plan Export to Excel

#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Create Date	Last Modified Date	Options
1	Release_Name	11/28/2019			PENDING APPROVAL	Administrator	11/28/2019		

Records from 1 to 1 Page 1 10 rows per page

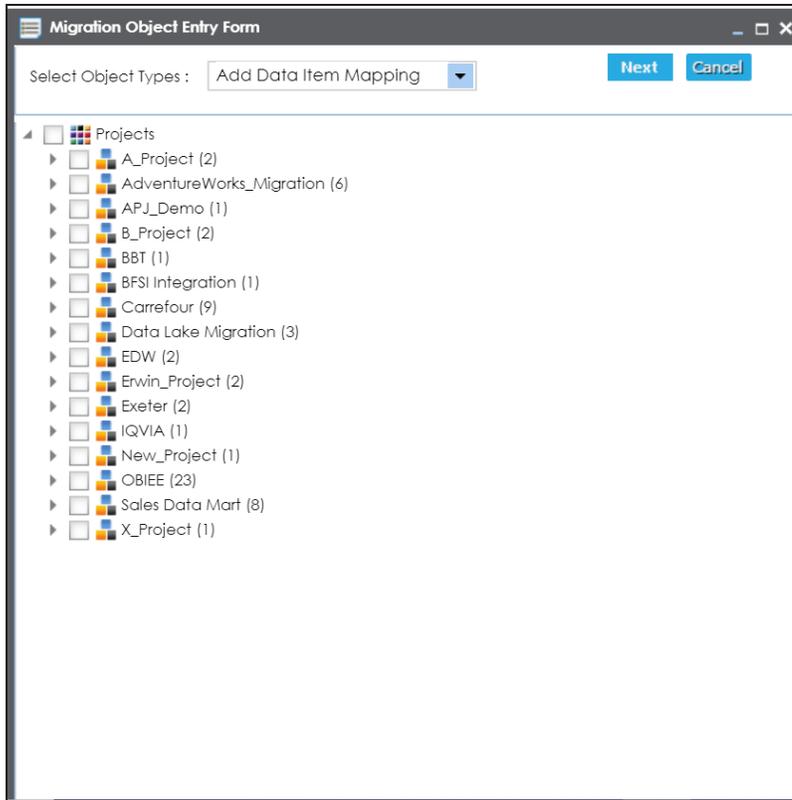
2. Click the required <Release\_Name>.

The Release View page appears showing the release object details.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

4. In **Select Object Types**, select **Add Data Item Mapping**.  
The following page appears.



5. Select the required mappings and click **Next**.

The Migration Object Entry Form page reappears.

6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Object Description	Specifies the description about the release object being added to the release. For example: The release object is a data item mapping under the Dat-warehouse project.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.
Migration Date / Time	Specifies the migration date and time of the release object from the DEV release environment.

Field Name	Description
	<p>For example, 04/30/2020 9:30 PM.</p> <p>Use  to enter the migration date. Enter the migration time in the HH : MM format.</p> <p>The Migration Date cannot exceed the Live Date.</p>
Migration From	<p>Specifies the current release environment of the release object.</p> <p>This field is set to DEV by default.</p>
DSN	<p>Specifies the DSN name from where the release object is being migrated.</p> <p>For example, ErwinDIS931.</p>
IP Address	<p>Specifies the IP Address from where the release object is being migrated.</p> <p>For example, 10.32.445.21</p>
Migration To	<p>This field is set to DEV by default. You can use the Promote Map option to <a href="#">migrate the selected data item mappings</a> to the required release environment for the first time.</p>
DSN	<p>Specifies the DSN name to which the release object is being migrated.</p> <p>For example, ErwinDIS932.</p>
IP Address	<p>Specifies the IP address to which the release object is being migrated.</p> <p>For example, 10.31.447.22</p>
Owner / Assignee	<p>Specifies the User ID of the release object's owner.</p> <p>For example, jdoe.</p> <p>The option list appears based on the users created in the Resource Manager. For more information on creating users, refer to the <a href="#">Creating Users and Assigning Roles</a> topic.</p>

7. Click **Save**.

The data item mappings are added as release objects to the release.

#	Object Name	Object Status	Type	Version	Date/Time		Migration Details		Owner	Created By	Create Date	Options
					Live Date	Migration Date	From	To				
1	K_New_Mapping	PENDING APPROVAL	Data Item	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	Production	PROD		Administrator	11/29/2019	[Edit] [Download] [Email] [Delete] [Refresh]
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST		Administrator	11/29/2019	[Edit] [Download] [Email] [Delete] [Refresh]
3	Sales_Codeset	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	[Edit] [Download] [Email] [Delete] [Refresh]
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	[Edit] [Download] [Email] [Delete] [Refresh]

8. Use the following options:

### Edit (✎)

To edit the release object, click ✎.

You can update the [release object status](#) only by editing a release object.



Use Edit option to migrate the data item mappings to a release environment for the second time and subsequently.

### Information (i)

To view the mapping information, click i.

### Download (↓)

To download the release object details, click ↓.

### Email (✉)

To send email notification about the release object click ✉.

### Delete (✕)

To delete the release object, click ✕.

## Promoting Data Item Mappings

You can promote data item mappings to different release environments in the Release Manager.

The promotion is reflected in the Mapping Manager and hence, it is important to assign promote system environments (for source and target) corresponding to the release environments.

To promote data item mappings, follow these steps:

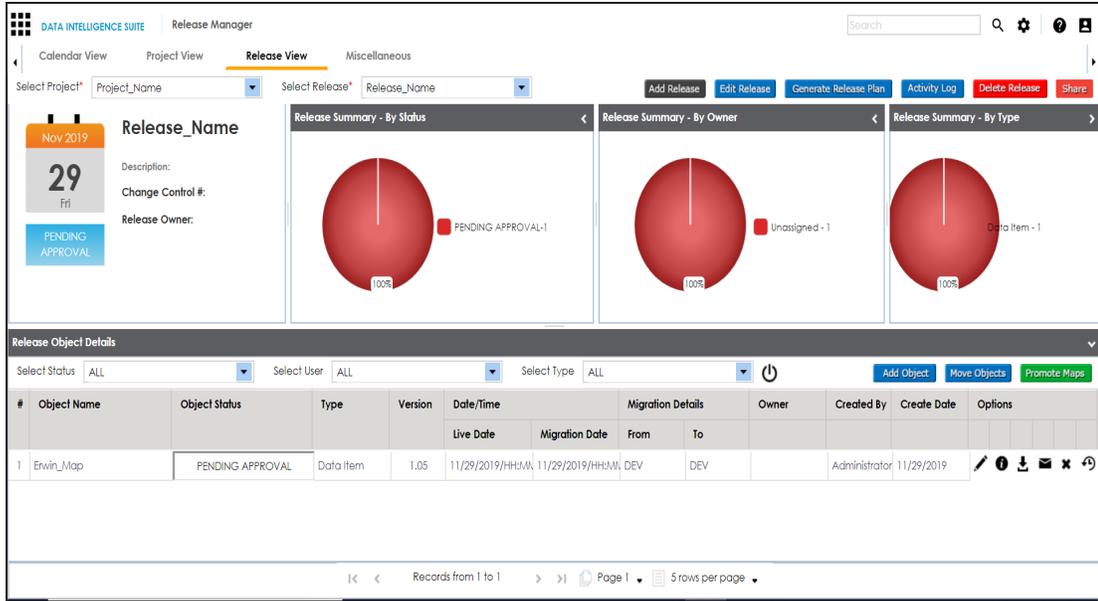
1. Under the **Project View** tab, click the required project.

The release listing of the project appears.

The screenshot shows the Release Manager interface with the Project View tab selected. The main area displays a 'Project Listing' table with columns for Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The selected project is 'Project\_Name' owned by 'Joe Villers'. Below the table is a 'Release Listing for: Project\_Name' table with columns for Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. The selected release is 'Release\_Name' with a status of 'PENDING APPROVAL'. On the right side, there are two summary charts: 'Release Summary - By Status' showing 100% PENDING APPROVAL, and 'Release Summary - By Owner' showing 100% Unassigned.

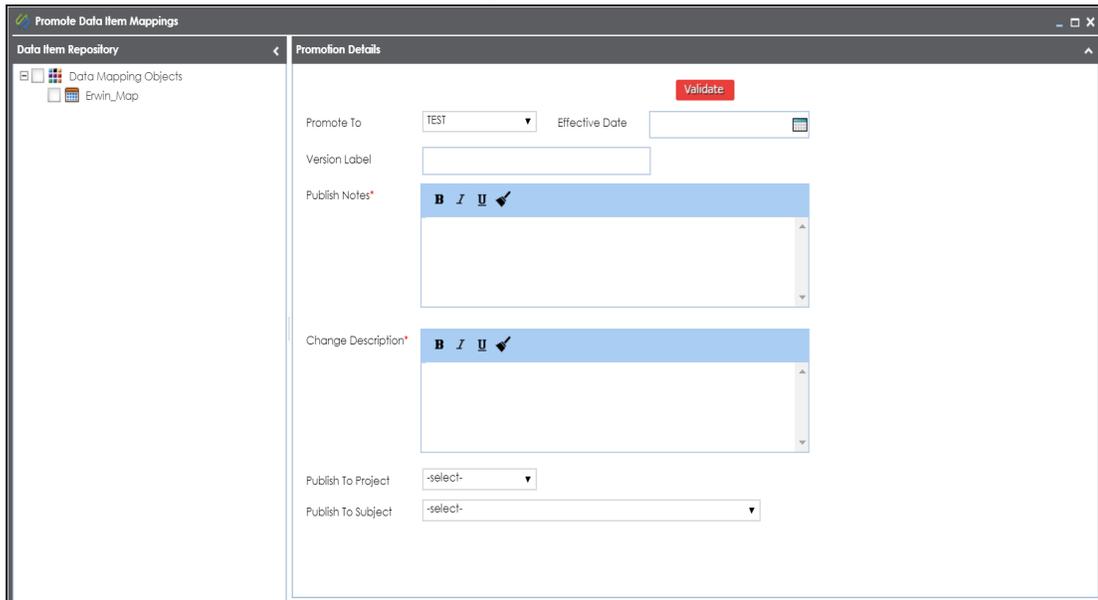
2. Click the required <Release\_Name>.

The Release View tab appears.



3. In the **Release Object Details** section, click the required <Data\_Item\_Mapping\_Object> and click **Promote Maps**.

The Promote Data Item Mappings page appears.



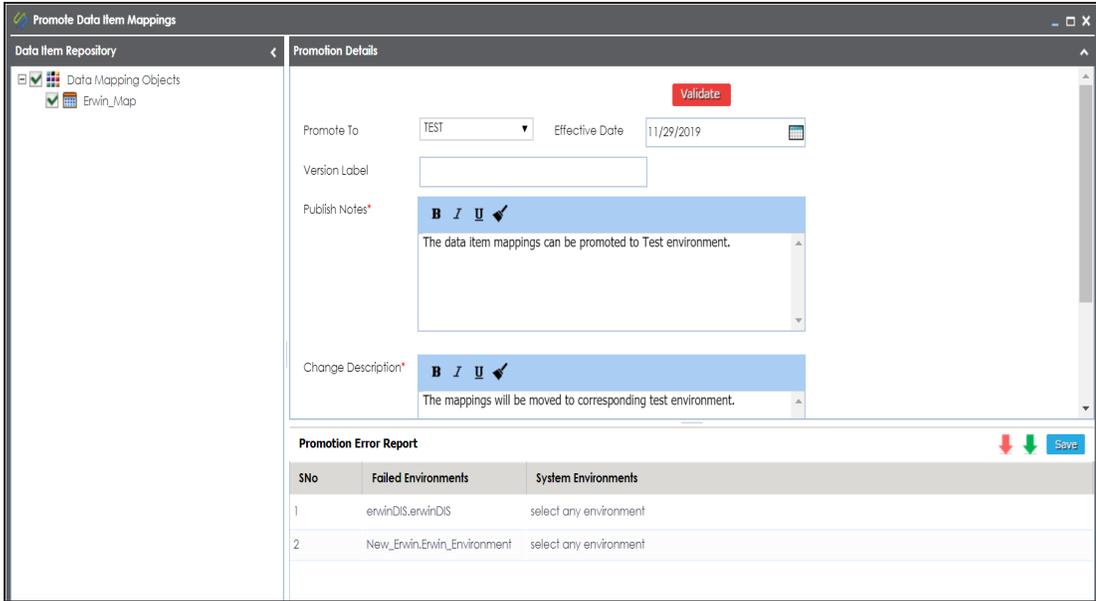
4. In **Data Item Repository**, select the required <Map\_Name> check box.

5. In **Promotion Details**, enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

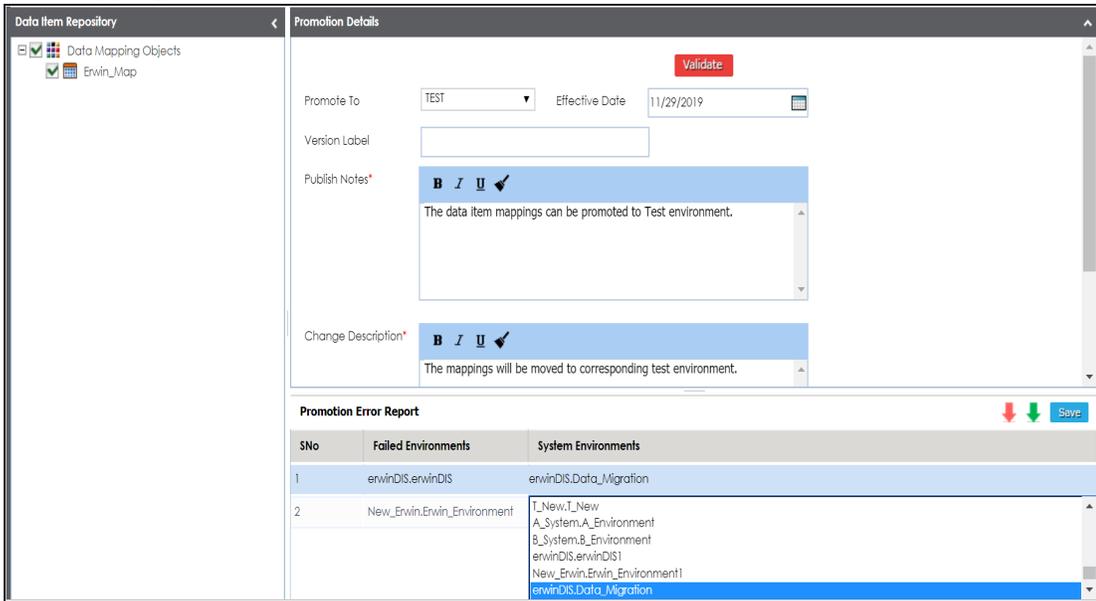
Field Name	Description
Promote To	Specifies the release environment to which the release object is being promoted. For example, TEST. Select the <a href="#">release environment</a> where you wish to promote the release object (data item mapping).
Effective Date	Specifies the effective migration date of the release object. For example, 04/22/2020. Use  to enter the effective migration date.
Version Label	Specifies the version label of the release objects. For example, Beta.
Publish Notes	Specifies the notes about the publishing of the data item mapping. For example: The data item mappings should be promoted to the Adventureworks_Migration.
Change Description	Specifies the description about the changes in the data item mapping. For example: The business rule in the data item mappings was changed to ABORT.
Publish To Project	Specifies the project in the Mapping Manager to which the data item mapping is being promoted. For example, Adventureworks_Migration.
Publish To Subject	Specifies the Subject Area in the Mapping Manager to which the data item mapping is being promoted. For example, Providers.

6. Click **Validate**.

The Promotion Error Report appears, because corresponding promote system environments were not provided.

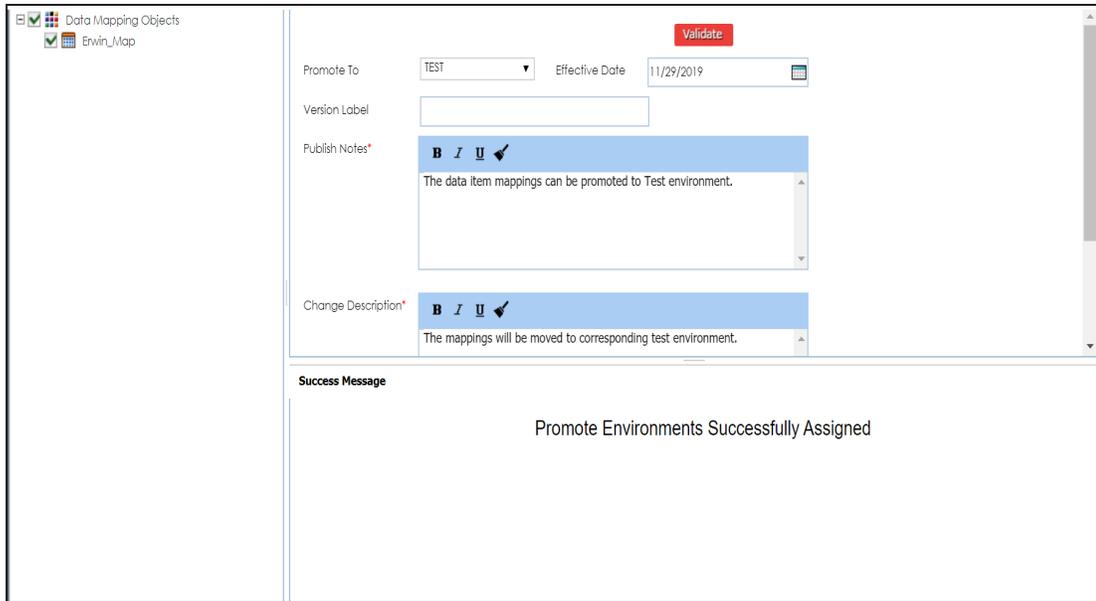


7. Double-click the corresponding cells to select the promote system environment for the mappings.



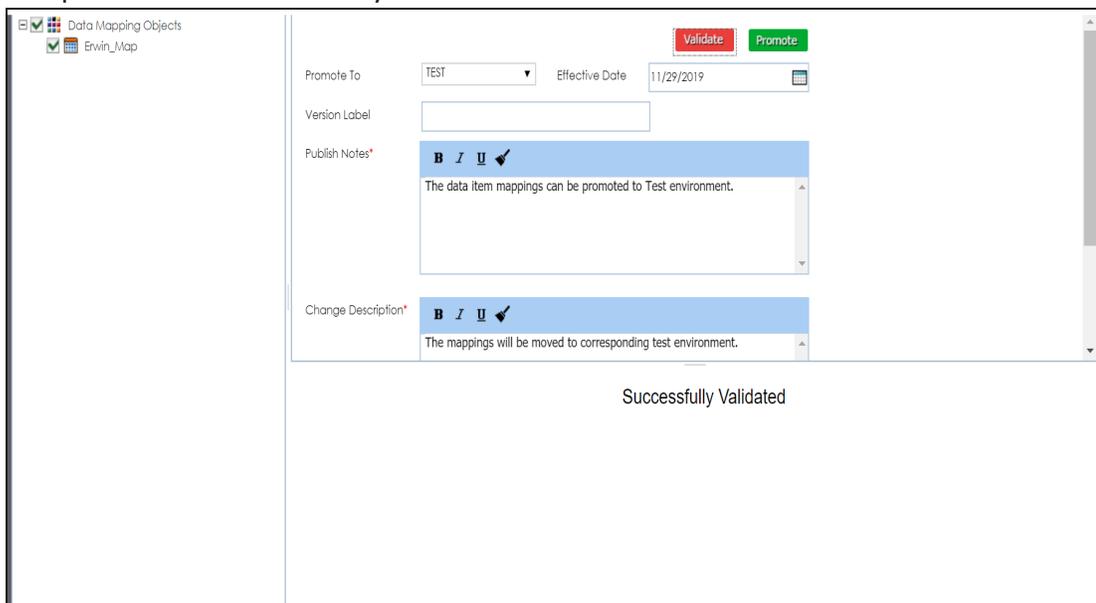
8. Click **Save**.

The promote system environments are assigned.



9. Click **Validate**.

The promotion is successfully validated.



10. Click **Promote**.

The object is promoted to the selected project.



When the data item mapping object is promoted, then it moves to the specified project in the Mapping Manager. The source and the target environment are also modified to the specified promote system environments.

## Adding Codeset as Release Objects

You can add codesets as release objects to a release and specify migration environment and date.

To add codesets as release objects to a release, follow these steps:

1. Under the **Project View** tab, click the required project.

The release listing of the required project appears.

The screenshot displays the Release Manager interface. The top navigation bar includes 'DATA INTELLIGENCE SUITE' and 'Release Manager'. Below the navigation, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. The main content area is divided into two sections: 'Project Listing' and 'Release Listing for: Project\_Name'. The 'Project Listing' table has columns for #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The 'Release Listing' table has columns for #, Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. On the right side, there are two summary charts: 'Release Summary - By Status' showing 100% PENDING APPROVAL, and 'Release Summary - By Owner' showing 100% Unassigned. The bottom of the interface shows pagination controls: 'Records from 1 to 1', 'Page 1', and '10 rows per page'.

2. Click the required <Release\_Name>.

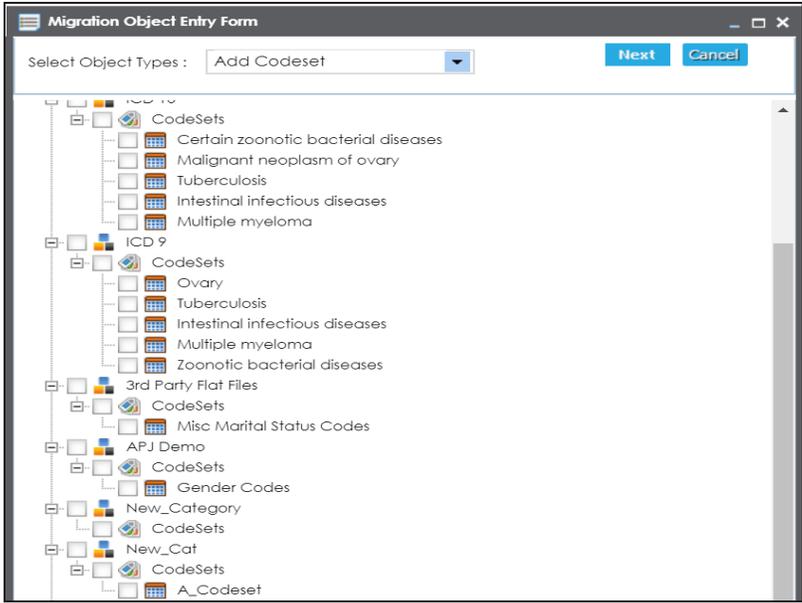
The Release View page appears.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

4. In **Select Object Types**, select **Add Codeset**.

The following page appears.



5. Select the required codesets and click **Next**.

The Migration Object Entry Form page reappears.

The screenshot shows the 'Migration Object Entry Form' window after clicking 'Next'. The 'Select Object Types' dropdown is still 'Add Codeset'. To the right of the dropdown are 'Previous', 'Save', and 'Cancel' buttons. Below the dropdown are several input fields:
 

- Object Description:** A text input field with a cursor at the beginning.
- Object Type:** A text input field containing 'Code Set'.
- Live Date / Time:** A date and time input field with '11/29/2019' and 'HH:MM AM/PM'.
- Migration Date / Time:** A date and time input field with '11/29/2019' and 'HH:MM AM/PM'.
- Migration From:** A dropdown menu with 'DEV' selected.
- DSN:** A text input field.
- IP Address:** A text input field.
- Migration To:** A dropdown menu with 'DEV' selected.
- DSN:** A text input field.
- IP Address:** A text input field.
- Owner/Assignee:** A dropdown menu with '-Select-' selected.

6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

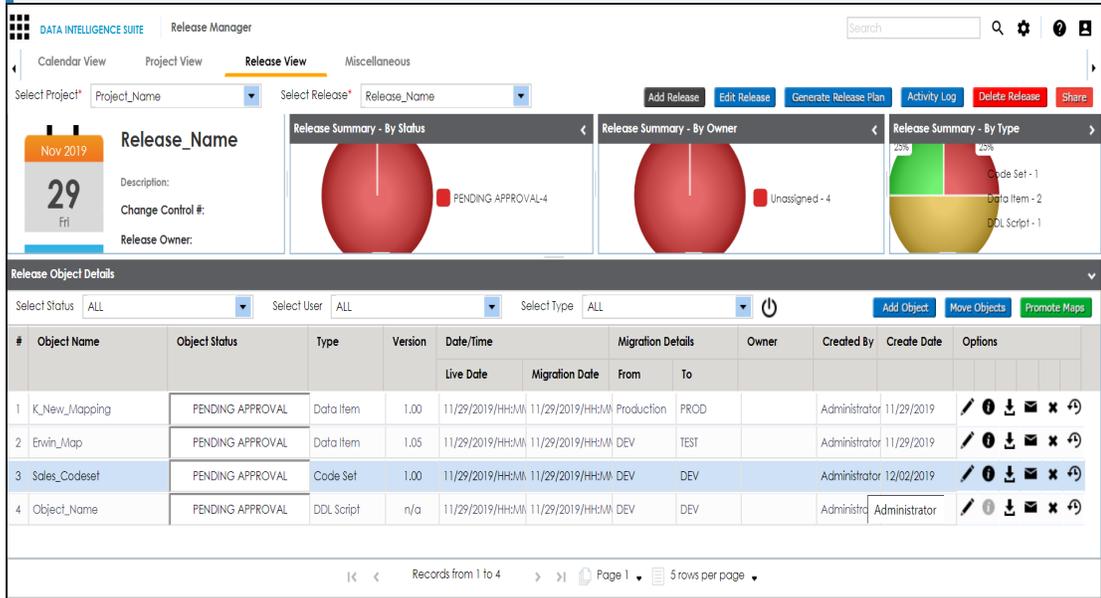
Field Name	Description
Object Description	<p>Specifies the description about the release object being added to the release.</p> <p>For example: The release object is a codeset under the 3rd Party Flat Files category.</p>
Live Date / Time	<p>Specifies the live date and time of the release object.</p> <p>For example, 04/03/2020 9:30 AM.</p> <p>Live Date is autopopulated and it is same as the release date.</p> <p>Enter the Live Time in HH : MM format.</p>
Migration Date / Time	<p>Specifies the migration date and time of the release object from a release environment.</p> <p>For example, 04/30/2020 9:30 PM.</p> <p>Use  to enter the migration date. Enter the migration time in the HH : MM format.</p> <p>The Migration Date cannot exceed the Live Date.</p>
Migration From	<p>Specifies the current release environment of the release object.</p> <p>For example, DEV.</p> <p>You can create release environments in the <a href="#">Release Manager Settings</a>.</p>
DSN	<p>Specifies the DSN name from where the release object is being migrated.</p> <p>For example, ErwinDIS931.</p>
IP Address	<p>Specifies the IP Address from where the release object is being migrated.</p> <p>For example, 10.32.445.21</p>
Migration To	<p>Specifies the release environment to which the release object is being migrated.</p> <p>For example, TEST.</p> <p>You can create release environments in the <a href="#">Release Manager Settings</a>.</p>
DSN	<p>Specifies the DSN name to which the release object is being migrated.</p> <p>For example, ErwinDIS932.</p>
IP Address	<p>Specifies the IP address to which the release object is being migrated.</p> <p>For example, 10.31.447.22</p>

Field Name	Description
Owner / Assignee	Specifies the User ID of the release object's owner. For example, jdoe. The option list appears based on the users created in the Resource Manager. For more information on creating users, refer to the <a href="#">Creating Users and Assigning Roles</a> topic.

7. Click **Save**.

The selected codesets are added as release objects to the release.

 Object Status can be modified by editing the release object. You can add or remove a release object status in the Release Manager Settings.



The screenshot shows the Release Manager interface with the following components:

- Release View:** Includes a calendar for Nov 2019 (29 Fri), a description field, change control number, and release owner.
- Release Summary - By Status:** A pie chart showing 4 objects in 'PENDING APPROVAL' status.
- Release Summary - By Owner:** A pie chart showing 4 objects assigned to 'Unassigned'.
- Release Summary - By Type:** A pie chart showing the distribution of object types: Code Set - 1, Data Item - 2, and DDL Script - 1.
- Release Object Details Table:**

#	Object Name	Object Status	Type	Version	Date/Time		Migration Details		Owner	Created By	Create Date	Options
					Live Date	Migration Date	From	To				
1	K_New_Mapping	PENDING APPROVAL	Data Item	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	Production	PROD		Administrator	11/29/2019	    
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST		Administrator	11/29/2019	    
3	Sales_Codeset	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	    
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	Administrator	    

8. Use the following options:

**Edit** 

To edit, the release object, click .

You can update the [release object status](#) only by editing a release object.

**Information** 

To view the mapping information, click .

## Download (↓)

To download the release object details, click ↓.

## Email (✉)

To send email notification about the release object click ✉.

## Delete (✕)

To delete the release object, click ✕.

## Adding Code Mappings as Release Objects

You can add code mappings as release objects to a release and specify migration environment and date.

To add code mappings as release objects to a release, follow these steps:

1. Under the **Project View** tab, click the required project.

The release listing of the required project appears.

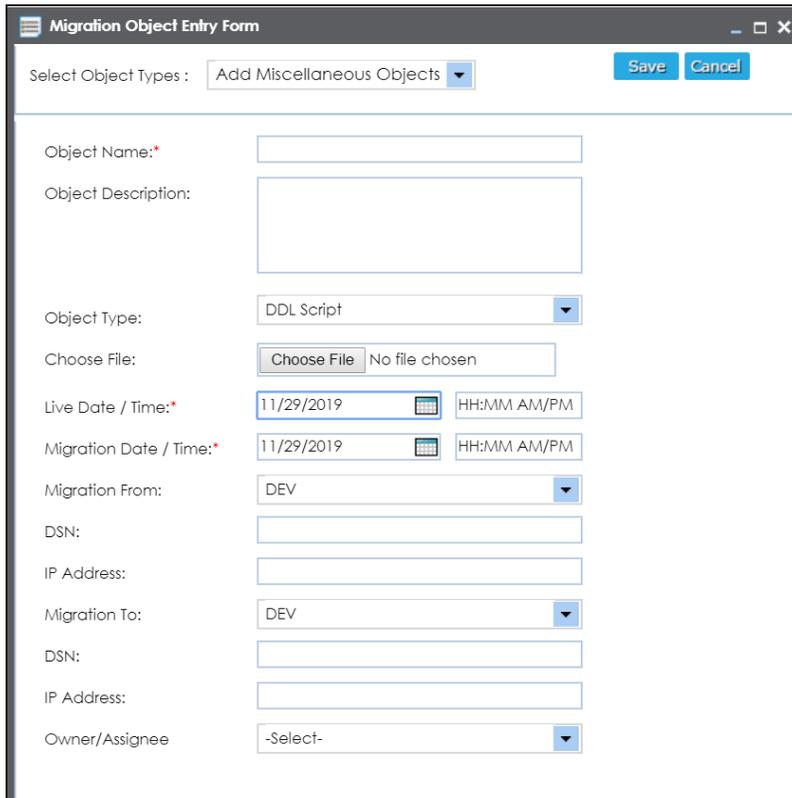
The screenshot displays the 'Release Manager' interface. At the top, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the tabs is a 'Project Listing' table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table contains three rows, with the third row (Project Name) highlighted. To the right of the table is a 'Project Details' panel showing 'Project Name', 'Description', 'Resource Name: Joe Villers', and 'Resource Email'. Below the project details is a 'Release Summary - By Status' chart showing a red circle with '100%' and 'PENDING APPROVAL'. Below that is a 'Release Summary - By Owner' chart showing a red circle with '100%' and 'Unassigned'. At the bottom of the interface, there is a pagination bar showing 'Records from 1 to 1', 'Page 1', and '10 rows per page'.

2. Click the required <Release\_Name>.

The Release View page appears showing the release object details.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

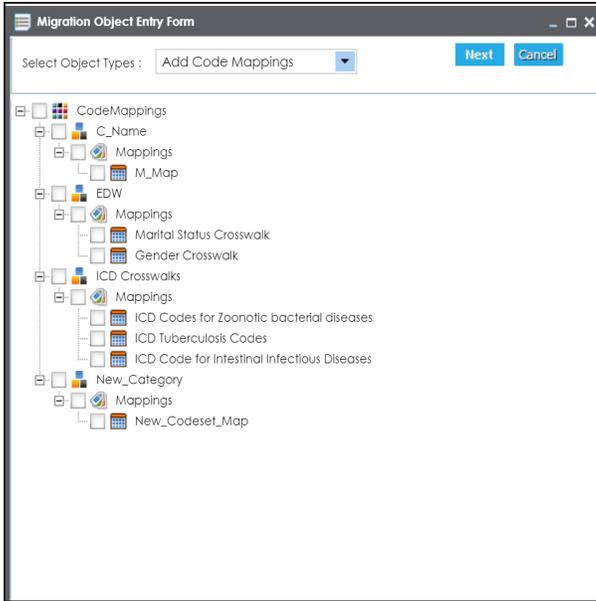


The screenshot shows a window titled "Migration Object Entry Form" with a standard Windows-style title bar. At the top, there is a "Select Object Types:" label followed by a dropdown menu currently set to "Add Miscellaneous Objects". To the right of this are "Save" and "Cancel" buttons. The main area of the form contains several fields:

- Object Name:** A text input field with an asterisk indicating it is required.
- Object Description:** A larger text area for entering details.
- Object Type:** A dropdown menu currently showing "DDL Script".
- Choose File:** A button labeled "Choose File" and a text field showing "No file chosen".
- Live Date / Time:** A date/time picker showing "11/29/2019" and a time format "HH:MM AM/PM".
- Migration Date / Time:** A date/time picker showing "11/29/2019" and a time format "HH:MM AM/PM".
- Migration From:** A dropdown menu currently showing "DEV".
- DSN:** A text input field.
- IP Address:** A text input field.
- Migration To:** A dropdown menu currently showing "DEV".
- DSN:** A text input field.
- IP Address:** A text input field.
- Owner/Assignee:** A dropdown menu currently showing "-Select-".

4. In **Select Object Types**, select **Add Code Mappings**.

The following page appears.



5. Select the required code mappings and click **Next**.

The Migration Object Entry Form page reappears.

 A screenshot of the 'Migration Object Entry Form' window after clicking 'Next'. The 'Select Object Types:' dropdown still shows 'Add Code Mappings'. To the right are 'Previous', 'Save', and 'Cancel' buttons. The main area contains several input fields:
 

- Object Description: [Empty text box]
- Object Type: [Code Map]
- Live Date / Time: [11/29/2019] [HH:MM AM/PM]
- Migration Date / Time: [11/29/2019] [HH:MM AM/PM]
- Migration From: [DEV] (dropdown)
- DSN: [Empty text box]
- IP Address: [Empty text box]
- Migration To: [DEV] (dropdown)
- DSN: [Empty text box]
- IP Address: [Empty text box]
- Owner/Assignee: [-Select-] (dropdown)

6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Object Description	<p>Specifies the description about the release object being added to the release.</p> <p>For example: The release object is a code map under the EDW category.</p>
Live Date / Time	<p>Specifies the live date and time of the release object.</p> <p>For example, 04/03/2020 9:30 AM.</p> <p>Live Date is autopopulated and it is same as the release date.</p> <p>Enter the Live Time in HH : MM format.</p>
Migration Date / Time	<p>Specifies the migration date and time of the release object from a release environment.</p> <p>For example, 04/30/2020 9:30 PM.</p> <p>Use  to enter the migration date. Enter the migration time in the HH : MM format.</p> <p>The Migration Date cannot exceed the Live Date.</p>
Migration From	<p>Specifies the current release environment of the release object.</p> <p>For example, DEV.</p> <p>You can create release environments in the <a href="#">Release Manager Settings</a>.</p>
DSN	<p>Specifies the DSN name from where the release object is being migrated.</p> <p>For example, ErwinDIS931.</p>
IP Address	<p>Specifies the IP Address from where the release object is being migrated.</p> <p>For example, 10.32.445.21</p>
Migration To	<p>Specifies the release environment to which the release object is being migrated.</p> <p>For example, TEST.</p> <p>You can create release environments in the <a href="#">Release Manager Settings</a>.</p>
DSN	<p>Specifies the DSN name to which the release object is being migrated.</p> <p>For example, ErwinDIS932.</p>
IP Address	<p>Specifies the IP address to which the release object is being migrated.</p> <p>For example, 10.31.447.22</p>
Owner /	<p>Specifies the User ID of the release object's owner.</p>

Field Name	Description
Assignee	For example, jdoe. The option list appears based on the users created in the Resource Manager. For more information on creating users, refer to the <a href="#">Creating Users and Assigning Roles</a> topic.

7. Click **Save**.

The selected code mappings are added as release objects to the release.

The screenshot shows the 'Release Manager' interface. At the top, there are navigation tabs: 'Calendar View', 'Project View', 'Release View' (selected), and 'Miscellaneous'. Below the tabs, there are dropdown menus for 'Select Project\*' (Project\_Name) and 'Select Release\*' (Release\_Name). To the right, there are buttons: 'Add Release', 'Edit Release', 'Generate Release Plan', 'Activity Log', 'Delete Release', and 'Share'. The main content area is divided into three summary charts: 'Release Summary - By Status' (showing 'PENDING APPROVAL - 5'), 'Release Summary - By Owner' (showing 'Unassigned - 5'), and 'Release Summary - By Type' (a pie chart showing 'Code Map - 1', 'Code Set - 1', 'Item - 2', and 'DDL Script - 1'). Below the charts is the 'Release Object Details' section, which includes a table with columns: '#', 'Object Name', 'Object Status', 'Type', 'Version', 'Date/Time' (with sub-columns for 'Live Date' and 'Migration Date'), 'Migration Details' (with sub-columns for 'From' and 'To'), 'Owner', 'Created By', 'Create Date', and 'Options'. The table contains 5 rows of data. At the bottom, there are navigation controls: 'Records from 1 to 5', 'Page 1', and '5 rows per page'.

8. Use the following options:

**Edit** (✎)

To edit the release object, click ✎.

You can update the [release object status](#) only by editing a release object.

**Information** (i)

To view the mapping information, click i.

**Download** (↓)

To download the release object details, click ↓.

**Email** (✉)

To send email notification about the release object click .

### Delete (✕)

To delete the release object, click ✕.

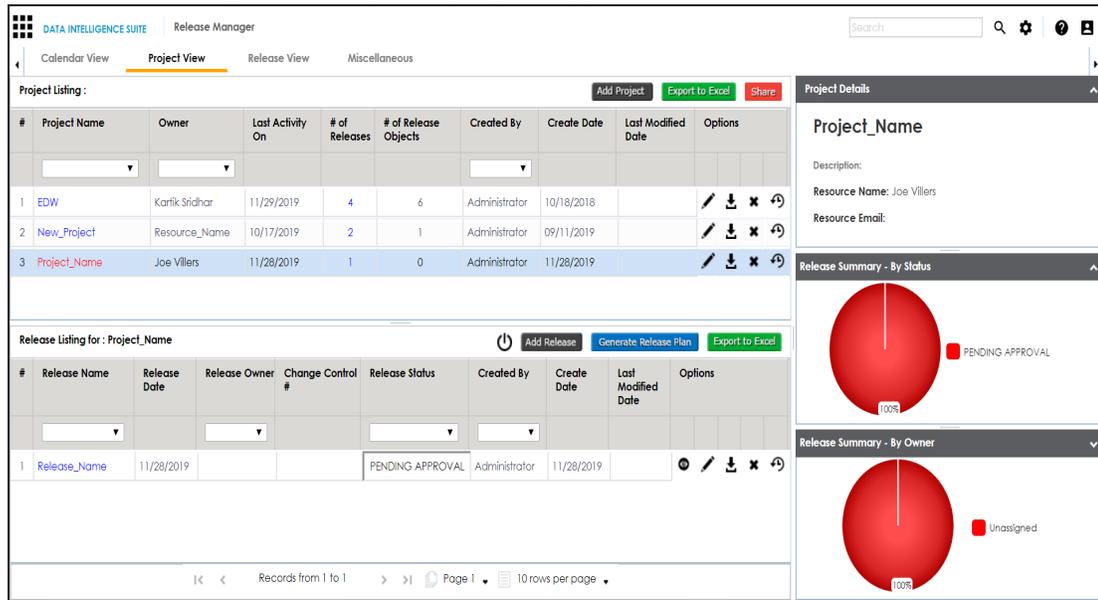
## Adding Miscellaneous Objects

You can create your own release object types under the miscellaneous objects in the Release Manager Settings and add those type of release objects to a release in the Release Manager. For more information on adding miscellaneous object types, refer to the [Configuring Release Object Types](#) topic.

To add miscellaneous objects to a release, follow these steps:

1. Under the **Project View** tab, click the required project.

The release listing of the required project appears.



#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
1	EDW	Kartik Sridhar	11/29/2019	4	6	Administrator	10/18/2018		   
2	New_Project	Resource_Name	10/17/2019	2	1	Administrator	09/11/2019		   
3	Project_Name	Joe Villers	11/28/2019	1	0	Administrator	11/28/2019		   

#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Create Date	Last Modified Date	Options
1	Release_Name	11/28/2019			PENDING APPROVAL	Administrator	11/28/2019		   

2. Click the required <Release\_Name>.

The Release View page appears.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

4. In **Select Object Types**, select **Add Miscellaneous Objects**.
5. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Object Name	Specifies the name of the release object being added to the release. For example, AdventureWorks_DDL.
Object Description	Specifies the description about the release object. For example: The release object is the DDL script of the AdventureWorks environment.
Object Type	Specifies the release object type. For example, DDL Script. You can <a href="#">add object type</a> in the Release Manager Settings.
Choose File	Specifies the physical file being attached to the release object.

Field Name	Description
	Click <b>Browse</b> to select the file.
Live Date / Time	<p>Specifies the live date and time of the release object.</p> <p>For example, 04/03/2020 9:30 AM.</p> <p>Live Date is autopopulated and it is same as the release date.</p> <p>Enter the Live Time in HH : MM format.</p>
Migration Date / Time	<p>Specifies the migration date and time of the release object from a release environment.</p> <p>For example, 04/30/2020 9:30 PM.</p> <p>Use  to enter the migration date. Enter the migration time in the HH : MM format.</p> <p>The Migration Date cannot exceed the Live Date.</p>
Migration From	<p>Specifies the current release environment of the release object.</p> <p>For example, DEV.</p> <p>You can create release environments in the <a href="#">Release Manager Settings</a>.</p>
DSN	<p>Specifies the DSN name from where the release object is being migrated.</p> <p>For example, ErwinDIS931.</p>
IP Address	<p>Specifies the IP Address from where the release object is being migrated.</p> <p>For example, 10.32.445.21</p>
Migration To	<p>Specifies the release environment to which the release object is being migrated.</p> <p>For example, TEST.</p> <p>You can create release environments in the <a href="#">Release Manager Settings</a>.</p>
DSN	<p>Specifies the DSN name to which the release object is being migrated.</p> <p>For example, ErwinDIS932.</p>
IP Address	<p>Specifies the IP address to which the release object is being migrated.</p> <p>For example, 10.31.447.22</p>
Owner / Assignee	<p>Specifies the User ID of the release object's owner.</p> <p>For example, jdoe.</p> <p>The option list appears based on the users created in the Resource Man-</p>

Field Name	Description
	ager. For more information on creating users, refer to the <a href="#">Creating Users and Assigning Roles</a> topic.

6. Click **Save**.

The release object is added to the release.

The screenshot shows the Release Manager interface. At the top, there are navigation tabs: Calendar View, Project View, Release View (selected), and Miscellaneous. Below the tabs, there are dropdown menus for 'Select Project' and 'Select Release'. To the right, there are buttons: Add Release, Edit Release, Generate Release Plan, Activity Log, Delete Release, and Share. The main content area is divided into three summary charts: 'Release Summary - By Status' (showing PENDING APPROVAL - 4), 'Release Summary - By Owner' (showing Unassigned - 4), and 'Release Summary - By Type' (showing Code Set - 1, Data Item - 2, DDL Script - 1). Below the charts is the 'Release Object Details' section, which includes a table of release objects.

#	Object Name	Object Status	Type	Version	Date/Time		Migration Details		Owner	Created By	Create Date	Options
					Live Date	Migration Date	From	To				
1	K_New_Mapping	PENDING APPROVAL	Data Item	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	Production	PROD		Administrator	11/29/2019	[Edit] [Info] [Download] [Email] [Delete] [Refresh]
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST		Administrator	11/29/2019	[Edit] [Info] [Download] [Email] [Delete] [Refresh]
3	Sales_Codeset	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	[Edit] [Info] [Download] [Email] [Delete] [Refresh]
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	[Edit] [Info] [Download] [Email] [Delete] [Refresh]

At the bottom of the table, there is a pagination bar: Records from 1 to 4, Page 1, 5 rows per page.

7. Use the following options:

**Edit** (✎)

To edit the release object, click ✎.

You can update the [release object status](#) only by editing a release object.

**Information** (i)

To view the mapping information, click i.

**Download** (↓)

To download the release object details, click ↓.

**Email** (✉)

To send email notification about the release object click ✉.

## Delete (✕)

To delete the release object, click ✕.

## Moving Release Objects

You can move release objects to a different release within the same project or to a release in a different project.



You cannot move a data item mapping object.

To move release objects, follow these steps:

1. Under the **Project View** tab, click the required project.

The release listing of the required project appears.

#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
1	EDW	Kartik Sridhar	11/29/2019	4	6	Administrator	10/18/2018		
2	New_Project	Resource_Name	10/17/2019	2	1	Administrator	09/11/2019		
3	Project_Name	Joe Villers	11/28/2019	1	0	Administrator	11/28/2019		

#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Create Date	Last Modified Date	Options
1	Release_Name	11/28/2019			PENDING APPROVAL	Administrator	11/28/2019		

2. Click the required **<Release Name>**.

The Release View page appears showing the release object details.

DATA INTELLIGENCE SUITE Release Manager

Calendar View Project View **Release View** Miscellaneous

Select Project\* Project\_Name Select Release\* Release\_Name

Add Release Edit Release Generate Release Plan Activity Log Delete Release Share

Nov 2019  
29 Fri  
PENDING APPROVAL

Release Name  
Description:  
Change Control #:  
Release Owner:

Release Summary - By Status: 100% PENDING APPROVAL-5

Release Summary - By Owner: 100% Unassigned - 5

Release Summary - By Type: 20% Code Map - 1, 20% Code Set - 1, 20% Item - 2, 40% DDL Script - 1

Release Object Details

Select Status ALL Select User ALL Select Type ALL

Add Object Move Objects Promote Maps

#	Object Name	Object Status	Type	Version	Date/Time		Migration Details		Owner	Created By	Create Date	Options
					Live Date	Migration Date	From	To				
1	K_New_Mapping	PENDING APPROVAL	Data Item	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	Production	PROD		Administrator	11/29/2019	✎ ⬇ ⬆ ✕ ⌂
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST		Administrator	11/29/2019	✎ ⬇ ⬆ ✕ ⌂
3	Sales_Codeset	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	✎ ⬇ ⬆ ✕ ⌂
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	✎ ⬇ ⬆ ✕ ⌂

Records from 1 to 5 Page 1 5 rows per page

### 3. Click **Move Object**.

The Move Object page appears showing the Release Objects Data Repository.

Move Objects

Release Objects Data Repository

Move To

Save Cancel

Select Project\* Please select Project

Select Release\*

Projects

- EDW
  - Releases
    - March 31 2019 Hotfix Release
      - Release Objects
        - SAP
        - Test
        - DDL Script
      - Pfizer Test
        - Release Objects
      - Release\_New
        - Release Objects
        - Object\_Name
      - Test
        - Release Objects
    - New\_Project
      - Releases
        - New\_Release\_Name
          - Release Objects
        - Release\_Name
          - Release Objects
      - Project\_Name
        - Releases
          - Release\_Name
            - Release Objects

### 4. In the Release Objects Data Repository tab, select the release objects.

5. In the **Move To** tab, Select the project and the release where the release objects should move to.
6. Click **Save**.

The release object moves to the selected project and the selected release.

## Sorting Projects and Releases

You can sort project listing in the Project View by:

- a. Project Name
- b. Owner
- c. Created Date
- d. Last Modified Date

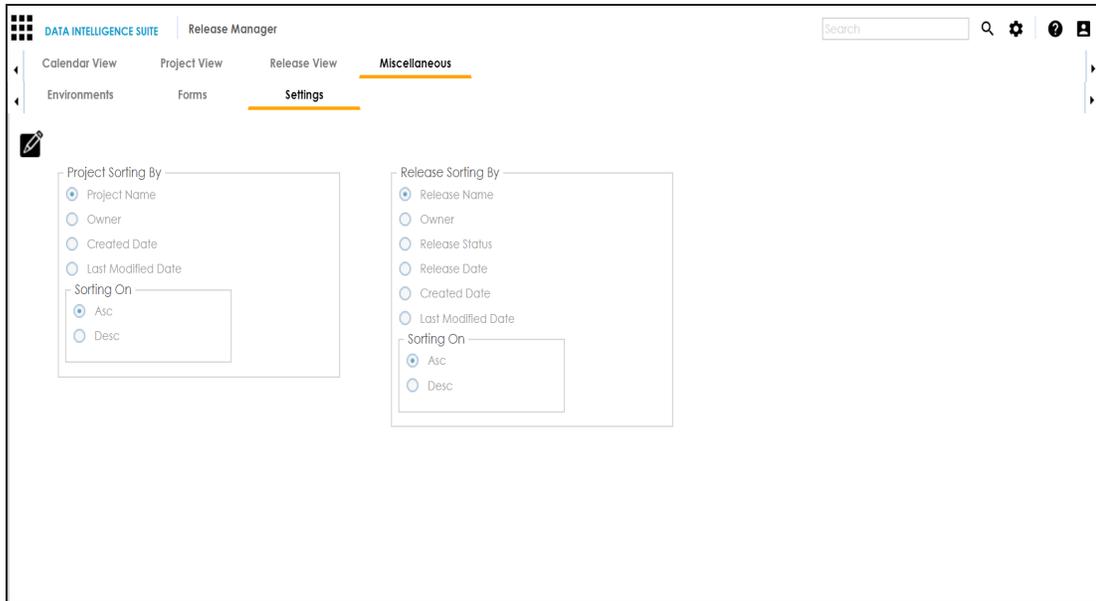
To sort projects, follow these steps:

1. Go to **Application Menu > Data Catalog > Release Manager > Miscellaneous**.

System/Environment Name	Dev	Test	Production	Prod
SAP.SAP	SAP.SAP			SAP.SAP
3rd Party Flat Files.3rd Party Flat Files	3rd Party Flat Files.3rd Party Flat Files		New_Erwin.Erwin_Environment1	3rd Party Flat Files.3rd Party Flat Files
EDW.EDW-PRD	EDW.EDW-PRD			EDW.EDW-PRD
BO Reports.BO Reports	BO Reports.BO Reports			BO Reports.BO Reports
ODS.Northwind	ODS.Northwind			ODS.Northwind
Teradata.Teradata	Teradata.Teradata			Teradata.Teradata
Salesforce.Salesforce	Salesforce.Salesforce			Salesforce.Salesforce
JDEdwards.JDEdwards	JDEdwards.JDEdwards			JDEdwards.JDEdwards
Atlas Sales System.Atlas Sales System	Atlas Sales System.Atlas Sales System			Atlas Sales System.Atlas Sales System
Customer Order Entry.COE	Customer Order Entry.COE			Customer Order Entry.COE
Data Models.DM_Landing	Data Models.DM_Landing			Data Models.DM_Landing
Data Models.DM_Staging	Data Models.DM_Staging			Data Models.DM_Staging
Data Models.DM_DW	Data Models.DM_DW			Data Models.DM_DW

2. Click **Settings**.

The following page appears.



3. Click .
4. Select the appropriate **Project Sorting By** option.
5. Select the appropriate **Sorting On** option.
6. Click **Save**.

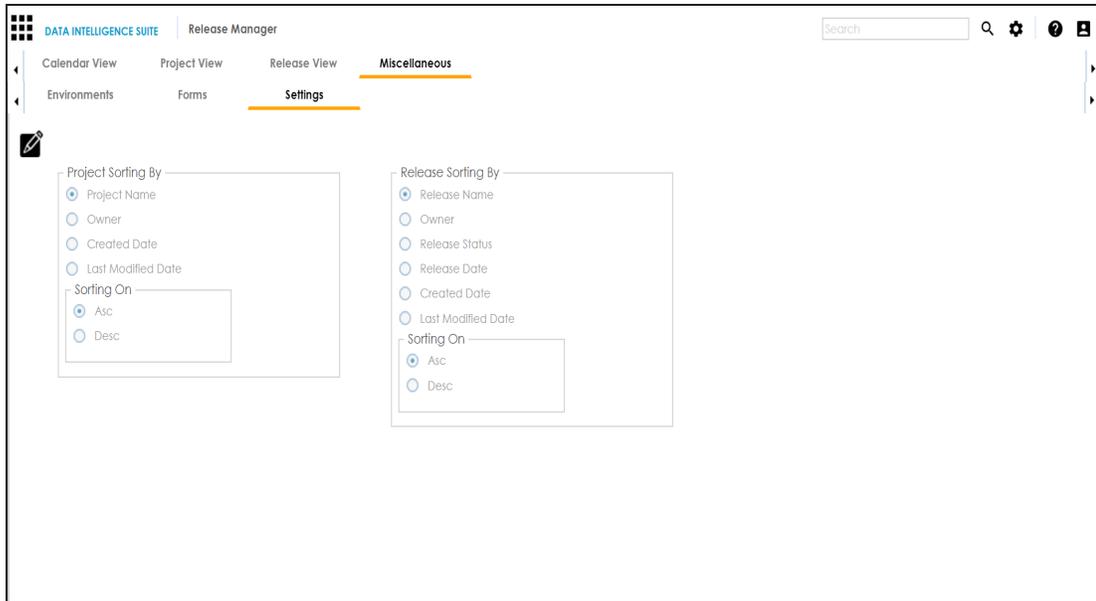
The project listings are sorted in the Project View.

You can sort release listings by:

- a. Release Name
- b. Owner
- c. Release Status
- d. Release Date
- e. Created Date
- f. Last Modified Date

To sort release listings, follow these steps:

1. Go to **Application Menu > Data Catalog > Release Manager > Miscellaneous > Settings**.



2. Click .
3. Select the appropriate **Release Sorting By** option.
4. Select the appropriate **Sorting On** option.
5. Click **Save**.

The release listings are sorted in the Project View.