

# erwin Data Intelligence Suite

# Life Cycle Management Guide

Release v11.0

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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**.

DATA INTELLIGENCE SUITE Requirem	nents M	anager									¢	0	
uirements Workspace	^ .		Specifications D	etails		Project Details		Proje	ct Users				2
Specification Templates Catalogue	e Sp	ecifications Li	sting										
<ul> <li>TechPubs (3)</li> <li>Tech Pubs 06 (0)</li> </ul>	•	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	Hist
	1	1	<u>TechPubsWritir</u>	TechPubs		Pending Rev	Administrator	04/09/2020 03:44:43	Administrator	04/09/2020 03:44:43	/	×	4
	2	2	Irial	TechPubs/TechPut		Pending Rev	Administrator	07/22/2020 10:19:13	Administrator	07/22/2020 10:19:13	1	×	4
	3	3	Irial1	TechPubs/TechPub		Pending Rev	Administrator	07/22/2020 10:42:35	Administrator	07/22/2020 10:42:35	1	×	
vmary 3	v												
Pending Appro	va												
Published													

The Requirements Manager dashboard appears:

UI Section	Function					
1-Requirements	Use this pane to browse through projects and specifications. It enables you					
Workspace 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:

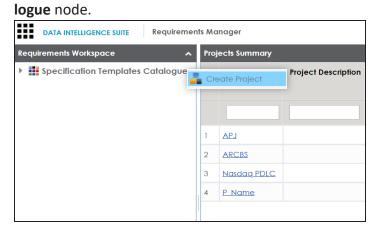
- Creating and managing projects
- Creating and managing specifications
- Linking the requirements to mappings

### **Creating Projects**

Projects are collections of your functional specifications and requirements. To define functional specifications, you can use the <u>templates</u> 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 Cata-



3. Click Create Project.

The Create Project page appears.

Create Project	_ = ×
	li ×
Project Name*	
Project Description	
\sub <u>А</u> <u>Н</u> В Z <u>U</u>	j≘ <b>j</b> ≘ t≊ t≊
	A
	~
L	

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.

Requirements Workspace		s	pecifications D	etails	_	Project Details		Projec	ct Users				
	Spe	cifications Lis	ting										
<ul> <li>EDW (1)</li> <li>APJ (1)</li> </ul>	*	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	Histor
<ul> <li>Access (1)</li> <li>Access (1)</li> </ul>													
<ul> <li>P_Name (1)</li> <li>erwin_Sales (2)</li> </ul>	1	11	<u>S Name</u>	EDW		Pending Rev	Administrator	11/05/2019 15:57:20	Administrator	11/05/2019 15:57:20	/	×	G
<ul> <li>New_Project (1)</li> </ul>													

2. Click the Project Users tab.

Requirements Workspace	4	Specifications Details	Project Details		Project Users
Specification Templates Catalogue EDW (1)	Conl	igure Users			
<ul> <li>APJ (1)</li> <li>APJ (1)</li> <li>Nasdaq PDLC (1)</li> <li>ARCBS (1)</li> <li>P_Name (1)</li> <li>erwin_Sates (2)</li> <li>New_Project (1)</li> </ul>	#	User ID	User Full Name	Assigned Rol	e Email ID

3. Click Configure Users.

The Assign/Unassign Users page appears.

Assign/Unassign User	User ID	User Full Name	Assigned Roles
	mboggs	Mike Boggs	ETL Developer
	Cyrus	Cyrus	Mapping Designer
	ks123	kartik sridhar	Mapping Designer
	janedoe	Jane Doe	Power User
	public	public - Default System User	public
	mread	mread	METADATA_READ
	sconnery	Sean Connery	Power User
	new_user_id	Robert Wilson	Mapping Admin
	jdenver	John Denver	Power User

- 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.

	DATA INTELLIGENCE SUITE	Requirements I	Nanager
Req	uirements Workspace	^ •	Specification Overview
4	Specification Templates	Catalogue	
١	🕨 <mark>-</mark> EDW (1)		
١	🕨 <mark>-</mark> APJ (1)		Specification Id
١	🕨 晶 Nasdaq PDLC (1)		10
I	🕨 📕 ARCBS (1)		
١	🕨 <mark>-</mark> P_Name (1)		Specification Name*
١	erwin_Sales (1)		s_Specs
	Cr	eate Specificatio	n
	📥 Im	port Specificatior	cification Template Type
	👼 Ne	ew Subject	Ith Migration Template
	📝 Ed	it Project	
	De	elete Project	cification Template Description
			Template to capture requiremen

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 2.

#### **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.

equirements Workspace			Specifications D	etails		Project Details		Projec	t Users				
Specification Templates Catalogue		cifications Li	sting										
TechPubs (3)     Im Specifications	•	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	Histo
<ul> <li>TechPubsWriting (v1.00)</li> <li>TechPubs (2)</li> </ul>													
	1	1	TechPubsWritin	TechPubs		Pending Rev	Administrator	04/09/2020 03:44:43	Administrator	04/09/2020 03:44:43	1	×	f.
	2	2	Irial	TechPubs/TechPub		Pending Rev	Administrator	07/22/2020 10:19:13	Administrator	07/22/2020 10:19:13	1	×	£,
	3	3	Trial 1	TechPubs/TechPub		Pending Rev	Administrator	07/22/2020 10:42:35	Administrator	07/22/2020 10:42:35	1	×	4

### **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 <u>Creating Templates</u> 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.

		DATA INTELLIGENCE SUITE	Requiremen	ts M	anager
Ree	qui	rements Workspace	^	4	Notes
4		Specification Templates C	atalogue		
	⊧	📕 EDW (0)			
	⊧	📕 APJ (1)			Notes
	⊧	📕 Nasdaq PDLC (1)			
	⊧	📕 ARCBS (1)			
	⊧	P_Name (1)			
	۲	erwin_Sales (0)	ate Specifica	tion	
		🕹 Impo	ort Specificat	ion	
		5 New	Subject		
		📝 Edit	Project		
		m Dele	te Project		
					_

3. Click Create Specification.

The Create Specification page appears.

Create Specification	×
Specification Template Type	Specification Description
Default	
Specification Template Description	•
Default Template	
Ţ	·
Specification Name®	Specification Owner
	-Select Owner-
Specification Version	Status
1.00	Pending Review
Version Label	Mail Comments
Version Label	Mail Comments

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 appro- priate template. You can create templates and add artifacts to tem- plates under <u>Requirements Manager Settings</u> . 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 spe- cification version, refer to the <u>Configuring Version Display</u> topic.
Version Label	Specifies the version label of the specification. For example, Beta. For more information on specification version label, refer to the <u>Con</u> - figuring Version Display 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 Com- ments	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 th					
	Configuring Email Settings 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. <u>Managing spe</u>cifications 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.

DATA INTELLIGENCE SUITE Requirements Manager							
Requirements Workspace	Specification Overview	Specification Details	Supporting Documents	Collaboratio			
Requirements Workspace     A       Image: Specification Templates Catalogue       Image: Specification Templates	Specification - Sales_Specs Project: erwin_Sales Owner: Status: Pending Review Enrolments Samples Management Transplants	specification Derails	supporting uocuments	Collaboratio			
	Providers						

- 3. Hover over an artifact title and click  $\mathbf{M}$ .
- 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 <u>Creating Child Artifacts</u> 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.

DATA INTELLIGENCE SUITE         Requirements Man           Requirements Workspace         A	ager Specification Overview	Specification Details	Supporting Documents	Collaboration Center
	Specification - Sales Project: erwin_Sales Owner: Status: Pending Review Enrolments Samples Management Transplants			
	Providers			

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

### The following page appears.

	s Man	ager						
Requirements Workspace	•	Specification O	verview	Specificati	on Details	Supporting Doc	uments	_
Specification Templates Catalogue	÷							
<ul> <li>BDW (1)</li> <li>APJ (1)</li> </ul>	#	Document Name	Document Description		Document Owner	Document Status	Document Type	Docume
<ul> <li>Arcbs (1)</li> <li>Arcbs (1)</li> </ul>								
<ul> <li>P_Name (1)</li> <li>erwin_Sales (1)</li> </ul>								
<ul> <li>Specifications</li> <li>Sales_Specs (v1.00)</li> </ul>								
Enrolments								
Management ■ Transplants ■ Providers								

### 3. Click 🛃.

The New Document Form page appears.

New Document Form	- =	×
Document Name*	Document Owner	
Document Object	Drag-n-Drop files here or click to select files for upload.	
Document Description	<u>≹ A</u> H B Z U ≣ ≡ ≡ ≡ ∷ ≒ ≒ ≤ ✓	
	•	
	v	
Approval Required Flag		

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 spe- cification. For example, Functional Requirements.
Document Object	Drag and drop document files or click 📤 to select and upload doc- ument files.
Document Owner	Specifies the document owner's name.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn- b5YkMBq4ptA7jhg5/view
Description	Specifies the description of the document. For example: The document contains a detailed record of the func- tional 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.

INTELLIGENCE SUITE Requirement	NTELLIGENCE SUITE Requirements Manager							
ıts Workspace 🔨	•	Specification Overview	Specification Details	Supporting Documents	Collaboration Center			
ification Templates Catalogue	Search	+			Sear			
DWV (1)	_							
(1) Le								
asdaq PDLC (1)								
RCBS (1)								
Name (1)								
win_Sales (2)								
Specifications								
Sales_Specs (v1.01)								
<ul> <li>Enrolments</li> </ul>								
_								

3. Click +

The Add Topic page appears.

Add Topic	_ 🗆 ×
	→ 븝
Topic Name*:	]
Description :	]
	_

- 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. <u>Managing collaborations</u> involves:

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

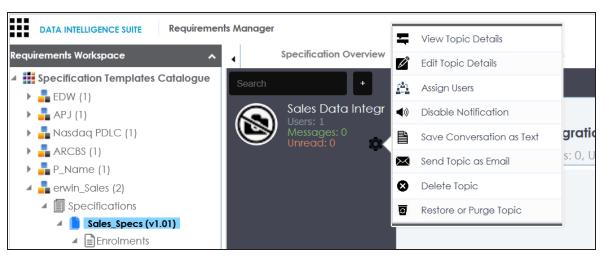
### **Managing Collaborations**

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.

	User Assignment	_ 🗆 ×
	public	
	abc	8
$\checkmark$	Administrator	8
	janedoe	8
	jdenver	
	jdoe	8
	M.Samuel	8
	mboggr	

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

• Today 11:17 AM	Administrator	Specification Details	Supporting Documents	Collaboration Center	His
Search	+				Search
Sales Dat Users: 2 Messages: Unread: 0	$\sim$	Sales Data Integration Users: 2, Messages: 1, Unread: 0			
		Today 11:17 AM Administrator			
		Hi			
				Today 11:17 AM	Administrator
		Hi Admin			
	Туре уо	ur Message			SEND

#### 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 so to send an email to the selected recipients.

#### **Delete Topic**

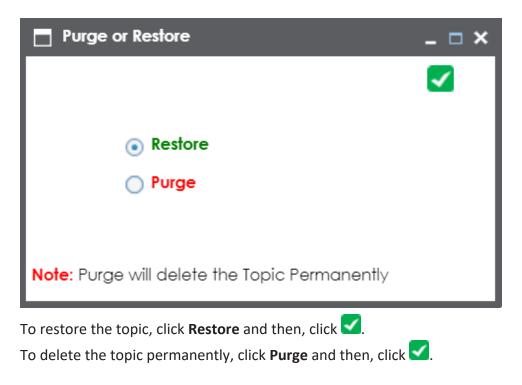
Use this option to delete the topic. The topic is deleted for all the assigned users.



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**.

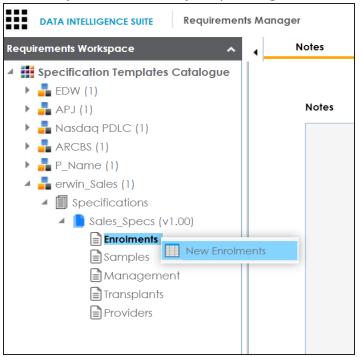


### **Creating Child Artifacts**

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.

			6	×
Name*				
Description				
<u>а</u> <u>н</u> в <i>х</i>	<u>u</u> ≡ ≣	§≡ <b>i</b> ≡	*≣ *≣	
				*
Mail Comments				Y
Mail Comments				

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

DATA INTELLIGENCE SUITE Requirements Manag	er			<u></u>	0 🖻	8
Requirements Workspace	Specification Overview	Specification Details	Supporting Documents	Collaboration Center		•
🔺 🏭 Specification Templates Catalogue						^
EDW (1)	Specification - Sales_Specs					
<ul> <li>APJ (1)</li> <li>Masdaq PDLC (1)</li> <li>ARCBS (1)</li> <li>P_Name (1)</li> </ul>	Project: erwin_Sales Owner: janedoe Status: Pending Review					1
<ul> <li>erwin_Sales (2)</li> <li>Image: Specifications</li> </ul>	Enrolments					11
Sades Specs (v1.01)     Enrolments     Enrolments from Health Care     Samples	As of May 1, 2014, we enrolled more than explore the enrollment to figure out the wh	232,000 customers in erwinDIS. More Nor ole story.	th Carolinians companies in health ins	urance purchased erwiDIS. We need to	^	
■Management ■ Transplants ■ Providers					~	
Archive	Enrollments from Health Ca	are				
<ul> <li>Health_Check (v1.00)</li> <li>C_Project (1)</li> <li>C_Sales (1)</li> </ul>		Status	Draft	$\sim$	^	
		Analyst	Select Analyst	~		
		Approval Date				
Summary			<u>а</u> <u>н</u> в ∠ <u>п</u>			~

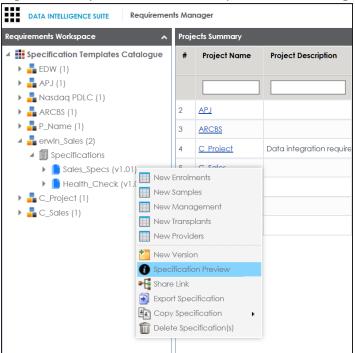
### **Managing Specifications**

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 <u>Creating</u> <u>Specification Version</u> 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**

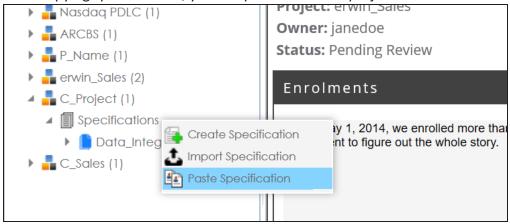
Use this option to copy specifications.

🔺 晶 erwin_Sales (2)	Enrolments	
Specifications	Enronnents	
🔺 📄 Sales_Specs (v1.01		we enrolled more than 232,000
Enrolments	New Enrolments	out the whole story.
📮 Enrollments f	New Samples	
Samples	New Management	
Management	New Transplants	
Transplants	New Providers	
Providers	🎦 New Version	
🔺 🎦 Archive	Specification Preview	from Health Care
Sales_Specs	Share Link	
🕨 📋 Health_Check (v1.	Export Specification	
🕨 📕 C_Project (2)	Copy Specification	Copy Selected
C_Sales (1)	Delete Specification(s)	Copy All
		_

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

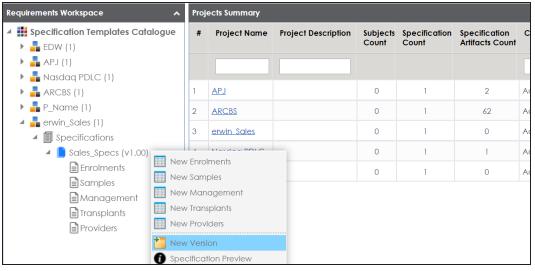
- Click the **Specifications** node. The specification Listing pager appears.
- Click .
   The Specification Details page appears in edit mode.
- Update the required fields and click .
   The specification is updated.

### **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.



2. Click New Version.

The New Version page appears.

New Version					_ □
					×
Specification Name					
Sales_Specs					
Specification Version					
1.01					
Version Label					
Channa Davariation					
Change Description*		 			
<u>≩ A</u> <u>H</u>	B <i>I</i> <u>U</u>		§= <b>I</b> =	' <u></u>	
					*
					-
Mail Comments					
Mail Comments					_

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

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

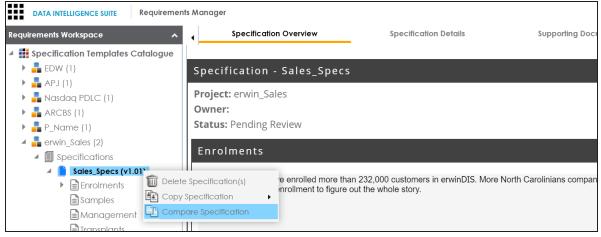
### 4. Click

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.

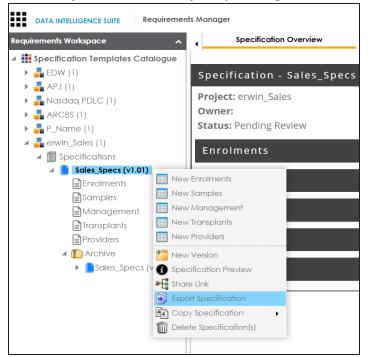
	Specification 11/07/2019	n Comparision Report	Date:	
Specification: Project: Owner:		Sales_Specs erwin_Sales		
Status: Template: Version:	Pending Review Health Migration Template 1.01	Pending Review Health Migration Template 1.00		
Enrolments				Color Representation-
	Enrollments from Health Care: Status: Draft Analyst: Select Analyst Approval Date: External Documentation Reference: Comments:			Changed Presentation     Unchanged Presentation
Samples				
Management				
Transplants				

## **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.

L

The Download File hyperlink appears in the notification area.

ication Details	Supporting Documents	Collab	Download File	<b>4</b>	*

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:

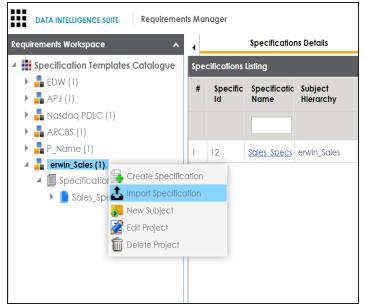
1. Unzip the exported specification.

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



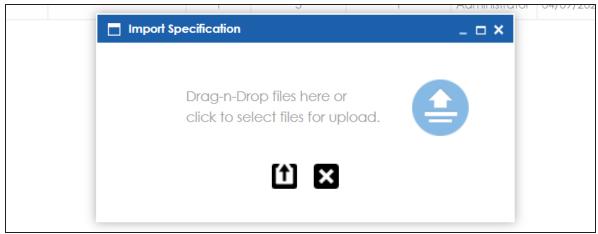
If you are importing the specification to the same project, then change the Specification Name and the Template Name in the .xml file. If you are importing the specification to a different project, you can import the .xml file as it is.

- 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  $\triangleq$  to browse the file.



6. Click 1

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.

rmations 🛛 🚺	APPEND OF	🔁 [A_Map]		Profiles: Default	-	🌣 🗟 👫 🖻	) 🗟 🐻 😣 < 1	<ul> <li>Metadata</li> <li>         3rd Party Flat Files     </li> </ul>
s # roject (1) Fransformations	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule	
Fest Cases Mappings 1 A.Map (v1.00)	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	int	4		
entureWorks_Migration (8) Demo (1) 1)	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_PRC	int	4		Data Lake     Data Models     EDW
tegration (1) four (9) 3 Lake Migration (3) 2)	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	50		
2) Project (2) 4 (2)	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	4000		PeopleSoft     Salesforce     SAP
(1) Project (1) 5 (23) Data Mart (8)	A_System	A_Environment	dbo.CAT_DIALOG	CREATED_BY	varchar	50		
	A_System	A_Environment	dbo.CAT_DIALOG	CREATED_DATE_TI	datetime	8		Code Mappings Catalogue

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

A list of header columns appears.

DATA INTELLIGENCE SUITE Mapping	Manage	er						
Workspace Mappings 🛛 👻	4	Mapping Specific	ation Gro	phical Designer	Test Speci	fication	Workflow Lo	g
Mappings		APPEND 077	@ [A_Map]		Profiles:	Default	•	¢.
Projects A_Project (1) Transformations	#	Source System Name	Source Environment Name	Source Table	Source C	olumn	Source Column Data Type	Source Length
🏷 Test Cases 🖌 🌉 Mappings 🖌 🥅 A_Map (v1.00)	1	A_System	A_Environment	<ul> <li>Specification Artifi</li> <li>Lookup Reference</li> <li>Lookup On</li> <li>Trans Lookup Cor</li> </ul>	Column		nt	4
MappingTargets AdventureWorks_Migration (8) APJ_Demo (1) BBT (1)	2	A_System	A_Environment	Source Column Pr	ecision	-	. nt	4
<ul> <li>BFSI Integration (1)</li> <li>Carrefour (9)</li> <li>Data Lake Migration (3)</li> </ul>	3	A_System	A_Environment	dbo.CAT_DIALO	G CAT_DIALC	DG_TAB	varchar	50

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.

Manager						â Sec	arch Q 🔅 🛛
	ping Specification	Graphical	Designer Tes	t Specification Workflow Log		•	Metadata Catalogue 🔍 🔺
<u> 6</u> 🖬 🛃		] [A_Map]	Profi	les: Default 🔽 🧔	t 🐚 👫 🗐 🗖	, 🐻 😣 < 🗖	Code Mappings Catalogue 🔺
et Column	Target Column Length	Created By	Created Date	Specification Artifacts	Last Modified By	Last Modified Date Time	Specification Artifact Catalogue 🗸
Туре	Lengin					Dale lime	Specification Templates Catalogue  EDW (0)
	4	Administrator	2019-10-16 15:44:32.383	<b>Sp_Name</b> (v1.00)	Administrator	2019-10-17 11:56:07.883	<ul> <li>APJ (1)</li> <li>Assdaq PDLC (1)</li> <li>ARCBS (1)</li> </ul>
	4	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353	<ul> <li>P_Name (1)</li> <li>Image: Specifications</li> <li>Sp_Name (v1.00)</li> </ul>
ar	50	Administrator	2019-10-16 15:44:32.383		Administrator	2019-10-16 15:45:28.353	

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:

DATA INTELLIGENCE SUITE	Test Mana	ager									0 🖻 🖪
lest Projects	1	Projec	t Statistics		<	Project Te:	it Case Status				2
			2 Projects 4 Test Cases	2 Mappings 1 Test Steps	O Tables	••••					
		Projec	t Summary		-						3
		•	Project Name	Project Description	Project Owner	Test Cases Count		Created By	Created Date	Last Modified By	Last Modifie Date
		1	Lineage Demo			2	0	Administrator	2020-02-26 04:01:32	Administrator	2020-02-26 04:01:
						2	1		2020-05-19 08:34:01		

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

DATA INTELLIGENCE SUITE Test Man	ager										0	88
Test Projects <	Proje	ct Statistics			<	Project Test Cas	e Status					>
Englects     AdventureWorks_Migration     AdventureWorks_Migration     Bev_Envh_Project     New_Envh_Envhorment     Adventure_Migration     Adventure_Migration     Adventure_Migration     My Test Cases		9	2 appings 3 st Steps	3 Tobles	×							
	Proje	ct Summary										~
	*	Project Name	Project Description		Project Owner	Test Cases Count	Test Steps Count	Created By	Created Date	Last Modified By	Last Modi	ified Date
	1	AdventureWorks_Migration				3	1	Administrator	2018-10-19 06:11:28.0	Administrator	2018-10-1	9 06:11:28.0
	2	Erwin Project				1	0	Administrator	2019-09-12 17:14:20.4	Administrator	2019-12-1	0 15:13:21.2
	3	New Erwin Erwin Environment				1	0	Administrator	2019-09-12 17:12:38.9	Administrator	2019-10-3	1 15:46:20.1
	4	A System A Environment				2	1	Administrator	2019-10-15 16:08:25.2	Administrator	2019-10-1	5 16:08:25.2
	5	erwinDIS Data Migration				2	1	Administrator	2019-11-19 11:27:29.3	Administrator	2019-11-1	9 11:27:29.3

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>\_
- 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.

DATA INTELLIGENCE SUITE Test Mana	ager							0 🖻 🖪
Test Projects <	Test Co	ase Statistics	[Environment]: erwinDIS_Data_Mi	gration	<	Test Case Status [Environment]: erwin[	DIS_Data_Migration	>
Adventure/Works_Migration     Adventure/Works_Migration     Adventure/Works_Migration     Mop_Level     Mop_Level     Asystem_A_Shifter/Morantent     Asystem_A_Shifter/Morantent     Source_Data     My Test Cares		<b>1</b> Tables	2 Test Cases	<b>1</b> Test Steps				
	Test Co	ase Summary	r [Environment]: erwinDIS_Data_M	igration				lt 🗸
	*	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status
	1	21	Source Data	DQ	Metadata Testing	It is to test the metadata		
	2	22	<u>I Name</u>					

**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.

DATA INTELLIGENCE SUITE Test Man	ager		0	۵	8	
Test Projects 🗸	Test Case Information: Sou	rce_Data			3	
Herojects     AdventureWorks_Mgration     AdventureWorks_Mgration     Map_Level     Mov_Envin_Environment     Asystem_A_Environment     Source_Data     My Test Cases	Test Case Overview Test Case Id Test Case Name* Test Case Name* Test Case Label Type of Testing	21 Source_Data DQ Priority Metadata Testing Extendable				
	Test SQL Script	select*from ADS_ASSOCIATIONS				
	Expected Result	data from six columns.				÷

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.

DATA INTELLIGENCE SUITE Test Mai	inager							0 🗉
est Projects 🗸	Test C	Case Statist	lics [User]: Administrator		<	Test Case Status [User]: Administrator		
Projects AdventureWorks_Migration  Projects  AdventureWorks_Migration  Project  Project Project  Proj		5 Projec 9 Test Co	3		3 Tables			
Source_Data T_Name	Test G	Case Summ	nary [User]: Administrator			_		ſ
New_Association T_Name Customer_Profile	#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status
	1	8	IC 001 AccountDescription		MANUAL	Volidate the Record Count for Acco		DESIGN
	1	8	TC 001 AccountDescription		MANUAL	Validate the Record Count for Accor		DESIGN
	1 2 3				MANUAL	Validate the Record Count for Accord		
		23	Map Level		MANUAL	Validate the Record Count for Accord		
	3	23 25	<u>Map Level</u> A Test	DQ	MANUAL MANUAL Metadata Testing	Validate the Record Count for Accord		

# **Using Release Manager**

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

	DATA IN	NTELLIGENCE	SUITE	Release Manager	-			Search	< \$ 0 ▣ 8
L	Calend	lar View	Proje	ect View Release View	Miscellaneous				1
	Day	Week	Month	Year		September 2020		人 🔁	Today 🖌 🕨 2
		Monday		Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
			31	01	02	03	04	05	06
			07	08	09	10	11	12	13
			14	15	16	17	18	19	20
			21	22	23	24	25	26	27
			28	29	30	01	02	03	04

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

	Calendar View: Select this view to list the releases on a calendar
	Project View: Select this view to list the releases under a project.
	Release View: Select this view to list release object details under a
	release.
2-Bottom	Use this pane to view or work on the data based on your selection in the
Pane	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.

•	Calendar View																
Pro	oject Listing :							A	dd Project	Ехр	ort to E	xcel	Shi	are	Project Details		
#	Project Name	Owner		Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Mo Date	dified	Op	otions			EDW		
	T		T				•								Description:		
1	EDW	Kartik Srid	dhar	11/28/2019	4	6	Administrator	10/18/2018			1	Ŧ	×	Ð	Resource Name: Kartik Sridhar		
2	New_Project	Resource	e_Name	10/17/2019	2	1	Administrator	09/11/2019			1	Ŧ	×	Ð	Resource Email:		
Rel	lease Listing for : EDW						~		Generate Relea			Export	to Ex		Release Summary - By Status	PENDING APPROVAL	
Rel	lease Listing for : EDW Release Name	Release Date	Release Owner	Change ( #	Control Rel	lease Status	Created By	Create Date	Generate Relea Last Modified Date	ase Pla Opt		Export	to Ex		0	PENDING APPROVAL	
Rel	-		Owner	Change ( #	Control Rel	lease Status V	-	Create Date	Last Modified			Export	to Ex			PENDING APPROVAL	
#	Release Name	Date	Owner	*			Created By	Create Date	Last Modified	Opt				cel	Release Summary - By Owner	PENDING APPROVAL	
#	Release Name March 31 2019 Hotfix	Date	Owner ks123	*	PE	¥	Created By       Administrator	Create Date	Last Modified	Opt	ions	ŧ, ×	<b>د</b> ۹	cel		PENDING APPROVAL	
<b>*</b> 1 2	Release Name March 31 2019 Hotfix Pfizer Test	Date 03/30/2019	Owner ks123	*	PE	NDING APPROVAL	Created By Administrator	Create Date	Last Modified	Opt ©	ions	± × ± ×	( 4)	cel	Release Summary - By Owner		

### 2. Click Add Project.

The New Project page appears.

New Project		_ 🗆 ×
	 Save	
Project Name:*		
Project Description:		
Resource Name:*		
Resource Description:		
Resource Cell Phone:		
Resource Work Phone:		
Resource Email:		

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
Droject Name	Specifies the name of the project.
Project Name	For example, EDW.
Project Description	Specifies the description about the project.
Project Description	For example: List of releases targeted this spring.
Resource Name	Specifies the project owner's name.
Resource Marine	For example, Jane Doe.
	Specifies the description about the project owner.
Resource Description	For example: Jane Doe is the release manager of the organ-
	ization.
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.

DATA INTELLIGENCE SUIT	E Kelec	ase Manager										
Calendar View	Project Vie	w Relea	ise View	Misce	ellaneous							
ct Listing :							Add	Project Export	to Ex	cel	Sha	ire
Project Name	Owner	Last On	Activity	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Opt	ions		
•		•				T						
DW	Kartik Srid	har 11/28	3/2019	4	6	Administrator	10/18/2018			Ŧ	×	Ð
ew_Project	Resource	_Name 10/17	/2019	2	1	Administrator	09/11/2019		/	Ŧ	×	Ð
roject_Name	Joe Villers	11/28	0/2019	0	0	Administrator	11/28/2019		1	Ŧ	×	Ð
ise Listing for : Project	_Name					() Add	Release Ger	nerate Release Plan	E	xport	to Exc	pel
Release Name	Release Date	Release Owne	r Change ( #	Control R	Release Status	Created By	Create Date	Last Op Modified Date	tions			
v		•			•	•						
	t Listing : roject Name w w w poject_Name se Listing for : Project elease Name	t Listing : roject Name Owner W Kartik Srid w_Project Resource Joject_Name Joe Viller: se Listing for : Project_Name elease Name Release Date	t Listing : roject Name Owner Last on V Kartik Sridhar 11/28 ew_Project Resource_Name 10/17 oject_Name Joe Villers 11/28 se Listing for : Project_Name elease Name Release Release Owner	t Listing : roject Name Owner Last Activity W Kartik Sridhar 11/28/2019 ew_Project Resource_Name 10/17/2019 oject_Name Joe Villers 11/28/2019 se Listing for : Project_Name elease Name Release Release Owner Change O	t Listing : roject Name Owner Last Activity # of Releases W Kartik Sridhar 11/28/2019 4 sw_Project Resource_Name 10/17/2019 2 oject_Name Joe Villers 11/28/2019 0 se Listing for : Project_Name elease Name Release Release Owner Change Control #	t Listing :  roject Name Owner Last Activity on  # of Release Objects  # of Release Object # of Change Object # of Release Object # of Relea	t Listing : roject Name Owner Last Activity # of Release Objects Created By W Kartik Sridhar 11/28/2019 4 6 Administrator W Kartik Sridhar 10/17/2019 2 1 Administrator sw_Project Resource_Name 10/17/2019 0 0 Administrator oject_Name Joe Villers 11/28/2019 0 0 Administrator se Listing for : Project_Name Change Control Release Status Created By	t Listing :       Add       roject Name     Owner     Last Activity On     # of Release Objects     # of Release Objects     Created By     Create Date       V     Kartik Sridhar     11/28/2019     4     6     Administrator     10/18/2018       Swy_Project     Resource_Name     10/17/2019     2     1     Administrator     09/11/2019       oject_Name     Joe Villers     11/28/2019     0     0     Administrator     11/28/2019	t Listing :	t Listing :           Add Project       Export to Expor	t Listing : Add Project Export to Excel roject Name Owner Last Activity # of Release Objects Created By Create Date Last Modified Options The Market Stichar 11/28/2019 4 6 Administrator 10/18/2018 $\cdot$ $\cdot$ $\cdot$ $\cdot$ $\cdot$ sw_Project Resource_Name 10/17/2019 2 1 Administrator 09/11/2019 $\cdot$ $\cdot$ $\cdot$ $\cdot$ by the source_Name 10/17/2019 0 0 Administrator 11/28/2019 $\cdot$ $\cdot$ $\cdot$ $\cdot$ se Listing for : Project_Name Release Release Owner Change Control Release Status Created By Create By Create Date Last Modified Date Options Date Administrator 10/18/2018 $\cdot$	t Listing : Add Project Export to Excel State roject Name Owner Last Activity # of Release Objects Created By Create Date Last Modified Options W Kartik Stidhar 11/28/2019 4 6 Administrator 10/18/2018

2. Click Add Release.

The New Release page appears.

듺 New Release			_ □
			Save Cancel
Project Name*	Project_Name	User Defined Field 4	
Release Name:*			
Release Description:		User Defined Field 5	
		User Defined Field 6	
Change Control Number			
Release Date*	11/28/2019	User Defined Field 7	
Release Owner	-Select-	•	
User Defined Field 1		User Defined Field 8	
User Defined Field 2		User Defined Field 9	
User Defined Field 3		User Defined Field 10	

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

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

4. Click Save.

The release is added to the selected project.

	DATA INTELLIGENCE	SUITE Relea	sse Manager												९ 🗘	0	8
•	Calendar View	Project Vie	w Re	lease View	Misc	ellaneous											
Pro	ject Listing :							Ad	d Project Ex	port to E	xcel	Shi	are	Project Details			
ŧ	Project Name	Owner	Li C	ast Activity n	# of Release:	# of Release s Objects	Created By	Create Date	Last Modifie Date	d O	otions			Project_Name			
		•	۲				•							Description:			
1	EDW	Kartik Srid	har 12	/02/2019	4	7	Administrator	10/18/2018		1	ŧ	×	Ð				
2	New_Project	Resource	_Name 11	/29/2019	2	1	Administrator	09/11/2019		/	Ŧ	×	Ð	Resource Email:			
3	Project_Name	Joe Viller	5 12	/02/2019	1	5	Administrator	11/28/2019		/	Ŧ	×	Ð	Release Summary - By Status	_		
Rel	ease Listing for : Proje	ect_Name					() Ada	l Release Ge	merate Release P	lan	Export	to Ex	toel		PENDING APPRO	OVAL	
Ŧ	Release Name	Release Date	Release Ow	ner Chang #	e Control	Release Status	Created By	Create Date	Last Modified Date	Option				1005			
	•			•		PENDING AF V	•							Release Summary - By Owner			
1	Release_Name	11/29/2019			Γ	PENDING APPROVAL	Administrator	11/28/2019	11/29/2019	• /	Ŧ	×	Ð				
															Unassigne	d	
			< <	Records fron	n 1 to 1	> >  🜔 Page	1 🗸 📄 10 ro	ws per page 🖕									

5. Use the following options:

#### View (🔍)

To view the release details, click .

# Edit 🖍)

To edit, the release, click 🖍.

You can update the <u>release status</u> only by editing a release.

### Download (土)

To download the release details, click  $\pm$ .

#### Delete (X)

To delete the release, click X.

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 <u>Release Manager Settings</u>.

# **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.

	Calendar View	Project View	Release												
Pro	oject Listing :						Add	l Project	xport to E	xcel	Sha	re	Project Details		
Ŧ	Project Name	Owner	Last Ac On	ctivity # of Releases	# of Release Objects	Created By	Create Date	Last Modifi Date	ed O	otions			Project_Name		
		•	•			•							Description:		
1	EDW	Kartik Sridhar	11/29/2	2019 4	6	Administrator	10/18/2018		1	±	×	Ð	Resource Name: Joe Villers		
2	New_Project	Resource_No	ame 10/17/2	2019 2	1	Administrator	09/11/2019		1	Ŧ	×	Ð	Resource Email:		
3	Project_Name	Joe Villers	11/28/2	2019 1	0	Administrator	11/28/2019		1	Ŧ	×	Ð	Release Summary - By Status		
el	lease Listing for : Proje	ect_Name				() Ad	d Release Ge	nerate Release	Plan	Export	to Ex	cel			
	lease Listing for : Proje Release Name	_	elease Owner	Change Control	Release Status	Created By	d Release Ge Create Date	Last Modified Date	Plan Options		to Ex	œl		PENDING APPROVAL	
Rel		Release Re	elease Owner	Change Control #	Release Status		Create Date	Last Modified			to Ex	cel	100%	PENDING APPROVAL	
ŧ	Release Name	Release Re		•		Created By	Create Date	Last Modified						PENDING APPROVAL	
ŧ	Release Name	Release Re Date		•	<b>V</b>	Created By	Create Date	Last Modified	Options				100%	PENDING APPROVAL	
+	Release Name	Release Re Date		•	<b>V</b>	Created By	Create Date	Last Modified	Options				100%	PENDING APPROVAL	

2. Click the required <Release\_Name>.

The Release View page appears showing the release object details.

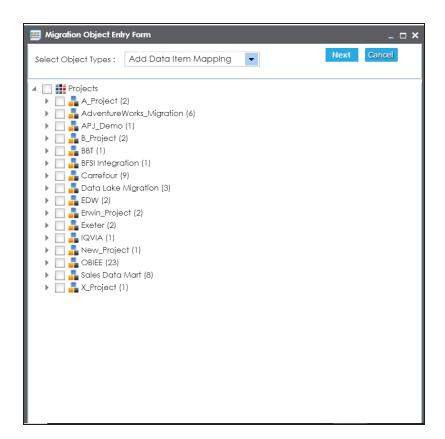
3. Click Add Object.

The Migration Object Entry Form page appears.

B Migration Object Entry F	orm	_ ¤ ×
Select Object Types : A	dd Miscellaneous Objects 🝷	Save Cancel
Object Name:*		
Object Description:		
Object Type:	DDL Script	
Choose File:	Choose File No file chosen	
Live Date / Time:*	11/29/2019 HH:MM AM/PM	
Migration Date / Time:*	11/29/2019 HH:MM AM/PM	
Migration From:	DEV	
DSN:		
IP Address:		
Migration To:	DEV	
DSN:		
IP Address:		
Owner/Assignee	-Select-	

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.

Migration Object Entry Fo	rm		_ <b>□</b> ×
Select Object Types : Ad	d Data Item Mapping	▼ Previous	Save Cancel
Object Description:			
Object Type:	Data Item		
Live Date / Time:*	11/29/2019	HH:MM AM/PM	
Migration Date / Time:*	11/29/2019	HH:MM AM/PM	
Migration From:	DEV		
DSN:			
IP Address:			
Migration To:	DEV		
DSN:			
IP Address:			
Owner/Assignee	-Select-	•	

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

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

## 7. Click Save.

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

	Calendar View Pro	pject View Release View	w Miscell	aneous											
ele	ect Project* Project_Nam	e 🔹 Sele	ct Release* Re	lease_Name	•		Add R	elease	Release G	enerate Release Plar	Activity Lo	g Delete F	telease	Sha	
	Nov 2019 Rele	ase_Name	elease Summary	- By Status		< Re	elease Summa	ary - By Owner		<	Release Sum	imary - By Typ			
29 Fri Description: Change Control #:				PENDING APPROVAL-4			Unassigned - 4					Code Set - 1 Data Item - 2 DDL Script - 1			
ì	Release	Owner:										UDLS	tipt - I		
le	ase Object Details														
ele	ect Status ALL	<ul> <li>Select</li> </ul>	User ALL		۲ د	Select Type ALL			- U		Add Object	Move Objects	Promot	е Мар	
ŧ	Object Name	Object Status		Version	Date/Time		Migration De	etails	Owner	Created By	Create Date	Options			
					Live Date	Migration Date	From	То							
	K_New_Mapping	PENDING APPROVAL	Data Item	1.00	11/29/2019/HH:M	11/29/2019/HH:M	Production	PROD		Administrator	11/29/2019	/ 0 1	¥ ¥	f 43	
	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:M/	11/29/2019/HH:MI	DEV	TEST		Administrator	11/29/2019	/ 0 1	× ×	4	
	Sales_Codeset	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:M/	11/29/2019/HH:MI	DEV	DEV		Administrator	12/02/2019	/ 0 1	. <b>M</b> X	e eg	
	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:M	11/29/2019/HH:MI	DEV	DEV		Administrator	12/02/2019	/01	×	4	
		,													

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 (10)

To view the mapping information, click ①.

### Download (土)

To download the release object details, click 🛓.

#### Email (M)

To send email notification about the release object click **S**.

#### Delete (X)

To delete the release object, click **X**.

# **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.

	DATA INTELLIGENCE S	SUITE Releas	se Manager												۹	\$	0 E
	Calendar View	Project View	v Relea	se View	Misce	llaneous											
Pro	ect Listing :							Add	Project	ixport to E	ixcel	S	hare	Project Details			
ŧ	Project Name	Owner	Last On	Activity	# of Releases	# of Release Objects	Created By	Create Date	Last Modifi Date	ed O	ption	5		Project_Name			
		•	Y				•							Description:			
1	EDW	Kartik Sridh	iar 11/29	/2019	4	6	Administrator	10/18/2018		1	' Ł	×	Ð	Resource Name: Joe Villers			
2	New_Project	Resource_	Name 10/17	/2019	2	1	Administrator	09/11/2019		1	' Ŧ	×	Ð	Resource Email:			
3	Project_Name	Joe Villers	11/28	/2019	1	0	Administrator	11/28/2019		1	' Ŧ	×	Ð	Release Summary - By Status	_		
Rel	ease Listing for : Project_Name Release Name Release Release Owner Change Control Release Status Date #		elease Status	Add Release     Generate Release Ran     Export to Excel     Create By     Create     Date     Modified     Date													
	•		•			٣	•							Release Summary - By Owner			
	Release Name	11/28/2019			F	ENDING APPROVAL	Administrator	11/28/2019		• /	' Ŧ	×	Ð				
1																	
1					1										Unassi	gned	

2. Click the required <Release\_Name>.

The Release View tab appears.

w Project View Relea										Q	¢ 0
	ase View Miscella	ineous									
roject_Name	Select Release* Rele	ease_Name	•		Add Relea	ase Edit Rel	Generat	e Release Plan	Activity Log	Delete R	elease
Release_Name	Release Summary -	By Status		< Rela	ease Summary	- By Owner		۲	Release Summo	гу - Ву Тур	•
Description:											
Change Control #:											
Release Owner:			PENDING APPROVA	L-1			Unassigned -	1		Dota It	em - 1
							-				
0						103			1008		
									100.0		
nile											
	Select User ALL		▼ Sel	ect Type ALL		•	ወ	Ad	ld Object Mo	ve Objects	Promote Ma
	Туре	Version	Date/Time				Owner	Created By	Create Date	Options	
Object Status	lype										
Object Status	Туре		Live Date	Migration Date	From	То		,			
Object Status PENDING APPRO		1.05	Live Date	-		To DEV		Administrator			Ŧ≡×
	Description: Change Control #: Release Owner:	Release_Name Description: Change Control #: Release Owner: It I for the second	Description: Change Control #: Release Owner:	Release_Name Description: Change Control #: Release Owner:	Release_Name Description: Change Control #: Release Owner:  Description: Cooperative Statement of the statem	Release_Name Description: Change Control #: Release Owner: Description: Descriptic: Description: Description:	Release_Name       Description:       Change Control #:       Release Owner:       PENDING APPROVAL-1	Release_Name Description: Change Control #: Release Owner: Description: Descriptic: Description: Description:	Release_Name         Description:         Change Control #:         Release Owner:         PENDING APPROVAL-1         Image: Control #:         Release Owner:	Release_Name Description: Change Control #: Release Owner: Description: Change Control #: Release Owner: Description: Close Description: Descriptic: Description: Description:	Release_Name         Description:         Change Control #:         Release Owner:         Image: Control #:         Release Owner:

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

🅢 Promote Data Item Mappings		- u ×
Data Item Repository <	Promotion Details	
E Data Mapping Objects		Validate
	Promote To	TEST TElfective Date
	Version Label	
	Publish Notes*	B Z ∐ ≼
		A
		Ψ.
	Change Description*	B <i>I</i> <u>U</u> <b>≼</b> ′
		A
		*
	Publish To Project	-select-
	Publish To Subject	-select-

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

6. Click Validate.

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

🅢 Promote Data Item Mappings						_ 🗆 ×		
Data Item Repository 🗸	Promotion Details					^		
🛛 🗹 🏭 Data Mapping Objects 📝 🥅 Erwin_Map				Validate		<b>A</b>		
	Promote To	TEST	<ul> <li>Effective Date</li> </ul>	11/29/2019				
	Version Label							
	Publish Notes*	в I Ц 🖌						
		The data item mapp	ings can be promoted to	o Test environment.	A			
			Ÿ					
	Change Description	B I ∐ ≼						
		The mappings will b	e moved to correspondi	•	•			
	Promotion Error Rep	ort				💺 🦊 Save		
	SNo Failed	Environments	System Environments	;				
	1 erwinDl	S.erwinDIS	select any environme	nt				
	2 New_Er	win.Erwin_Environment	select any environme	nt				

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

Data Item Repository 🗸	Promotion Details						^
🖻 🗹 🏭 Data Mapping Objects 📝 🥅 Erwin_Map					*		
	Promote To	TEST	▼ Effective Date	11/29/2019			- 1
	Version Label						- 1
	Publish Notes*	B I U 🖌		_			- 1
		The data item mapp	pings can be promoted to	Test environment.	*		
					*		
	Change Description	on* B Z U 🞸					
		The mappings will b	be moved to correspondin	g test environment.	t. 🔺		
	Promotion Error R	eport				¥	Save
	SNo Faile	ed Environments	System Environments				
	1 erwin	DIS.erwinDIS	erwinDIS.Data_Migratio	n			
	2 New_	Erwin.Erwin_Environment	T_New.T_New A_System.A_Environme B_System.B_Environme erwinDIS.erwinDIS1 New_Erwin.Erwin_Enviro erwinDIS.Data_Migratio	nt onment1			•

8. Click Save.

The promote system environments are assigned.

🗉 🗹 🚺 Data Mapping Objects						
Erwin_Map				Validate		
	Promote To	TEST 🔻	Effective Date	11/29/2019		- 1
	Version Label					
	Publish Notes*	В І Ц 🖌				- 1
		The data item mapping	s can be promoted to	Test environment.	*	
					v	
	Change Description*	в I Ц 🖌				
		The mappings will be m	noved to correspondin	g test environment.	A	•
	Success Message					
		I	Promote Envire	onments Succes	ssfully Assigned	

#### 9. Click Validate.

The promotion is successfully validated.

Erwin_Map				Validate	Promote	
	Promote To	TEST V	Effective Date	11/29/2019		
	Version Label					
	Publish Notes*	B I U 🖌				
		The data item mappings	can be promoted to	Test environment.	A	
	Change Description*	В І Ц 🖌				
		The mappings will be ma	oved to corresponding	g test environment.		
			Su	ccessfully Val	idated	

### 10. Click **Promote**.

The object is promoted to the selected project.

	١
E,	S
=9	e
	(

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.

.... DATA INTELLIGENCE SUITE Release Manage Q 🗘 🖉 🖪 Calendar View Project View Release View Miscellaneous **Project Listing** Export to Excel Share # Project Name # of Release Owner Last Activity On Created By Create Date Last Modified Options Date Project\_Name Releases Objects Description T Resource Name: Joe Ville Kartik Sridhar 11/29/2019 Administrator 10/18/2018 ∕±×⊕ 1 EDW 4 6 Resource Email: Administrator 09/11/2019 1 ± × 9 10/17/2019 2 2 New\_Project Resource\_Name 1 + × 9 3 Project Name Joe Villers 11/28/2019 0 Administrator 11/28/2019 nmary - By S Release Listing for : Project Name () Add Release PENDING APPROVAL Release Owner Change Control Release Status Create Date Last Modified Date **Release Name** Release Date Created By Options . ۲ ary - By ( ◎ / ± × ④ PENDING APPROVAL Administrator 11/28/2019 1 Release Name 11/28/2019 Unassigned I< < Records from 1 to 1 🔉 刘 🌔 Page 1 🗸 📃 10 rows per page 🖡

The release listing of the required project appears.

2. Click the required <Release\_Name>.

The Release View page appears.

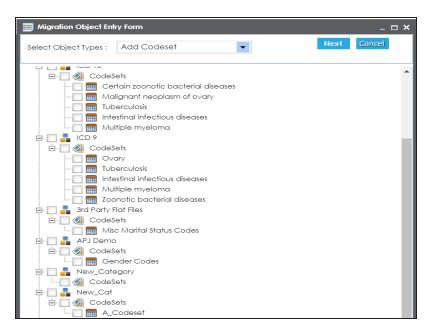
3. Click Add Object.

The Migration Object Entry Form page appears.

Migration Object Entry	Form	_ <b>-</b> ×
Select Object Types :	Add Miscellaneous Objects 💌	Save Cancel
Object Name:*		
Object Description:		
Object Type:	DDL Script	
Choose File:	Choose File No file chosen	
Live Date / Time:*	11/29/2019 HH:MM AM/PM	
Migration Date / Time:*	11/29/2019 HH:MM AM/PM	
Migration From:	DEV	
DSN:		
IP Address:		
Migration To:	DEV	
DSN:		
IP Address:		
Owner/Assignee	-Select-	

4. In Select Object Types, select Add Codeset.

The following page appears.



5. Select the required codesets and click Next.

Migration Object Entry Forr	n		_	×
Select Object Types : Add	Codeset	▼ Previous	Save Cancel	
Object Description:				
Object Type:	Code Set			
Live Date / Time:*	11/29/2019	HH:MM AM/PM		
Migration Date / Time:*	11/29/2019	HH:MM AM/PM		
Migration From:	DEV	▼		
DSN:				
IP Address:				
Migration To:	DEV	▼		
DSN:				
IP Address:				
Owner/Assignee	-Select-	-		

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

Field Name	Description
	Specifies the User ID of the release object's owner.
Owner /	For example, jdoe.
Assignee	The option list appears based on the users created in the Resource Man-
7.55161100	ager. For more information on creating users, refer to the Creating Users
	and Assigning Roles 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.

eli	ect Project* Project Name	- Solo	ct Release* Re										
			elease Summary	lease_Name	•		Add R			merate Release P		nmary - By Typ	
1	Nov 2019 Relect	se_Name	alease summary	- by sidius		¢ Ke	nease summa	ary - ву Own	er		20%	20%	e
I	29 Descriptio	n:			_								Set - 1
	Eri Change	Control #:			PENDING APPRO	VAL-4			Unassig	ned - 4			tem - 2 cript - 1
į	Release	Owner:											
e	ase Object Details												
e	ect Status ALL	▼ Select	User ALL		<b>▼</b> S	Select Type ALL			• ()		Add Object	Move Objects	Promote M
	Object Name	Object Status	Type Versio		Date/Time Migra		Migration D	etails	Owner	Created By	Create Date	Options	
					Live Date	Migration Date	From	То					
		PENDING APPROVAL	Data Item	1.00	11/29/2019/HH:MM	11/29/2019/HH:M	Production	PROD		Administrat	or 11/29/2019	/ 0 1	¥ ×
	K_New_Mapping									A destada da	11/00/0010		
	K_New_Mapping Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:M/	11/29/2019/HH:M	DEV	TEST		Administrati	or 11/29/2019	107	¥ ×
			Data Item Code Set	1.05 1.00		11/29/2019/HH:W		DEV			or 11/29/2019 or 12/02/2019		

8. Use the following options:

## Edit 🖍

To edit, the release object, click 🖊.

You can update the <u>release object status</u> only by editing a release object.

## Information (1)

To view the mapping information, click ①.

### Download (土)

To download the release object details, click  $\pm$ .

Email (🗡)

To send email notification about the release object click  $\blacksquare$ .

Delete (X)

To delete the release object, click **X**.

# **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.

	Project Details	hare	l s	ort to Excel	Project Expo	Add							oject Listing :	Pro
	Project_Name		ons	Option	Last Modified Date	Create Date	Created By		# of Releases	Last Activity On	ner	Owner	Project Name	Ŧ
	Description: Resource Name: Joe Villers						•				•	•		
	Resource Email:			/ 3		10/18/2018 09/11/2019	Administrator Administrator		4	11/29/2019	k Sridhar urce_Name	Kartik Srid	EDW New_Project	
_	Release Summary - By Status	· -9	± ×	1		11/28/2019	Administrator	0 /	1	11/28/2019	villers	Joe Viller	Project_Name	3
		Excel	iort to I	in Expo	nerate Release Pla	d Release Ger	du 🗛					roject_Name	lease Listing for : Proj	(CI
PENDING APPROVAL	ROOT	Excel	ort to I	n Expo		d Release Ger Create Date	Created By	telease Status	ge Control R	se Owner Change #	e Release	roject_Name Release Date	lease Listing for : Proj Release Name	
PENDING APPROVAL		Excel	iort to I	_	Last O Modified	Create Date		Release Status T	ge Control R	se Owner Change	Release	Release Date		#
		_	_									onto al Manuela	In one Caller of Law Post	

2. Click the required <Release\_Name>.

The Release View page appears showing the release object details.

## 3. Click Add Object.

B Migration Object Entry For	m		_ <b>□</b> ×
Select Object Types : Add	Miscellaneous Objects	•	Save Cancel
Object Name:*			
Object Description:			
Object Type:	DDL Script	-	
Choose File:	Choose File No file cho	osen	
Live Date / Time:*	11/29/2019	HH:MM AM/PM	
Migration Date / Time:*	11/29/2019	HH:MM AM/PM	
Migration From:	DEV	•	
DSN:			
IP Address:			
Migration To:	DEV	•	
DSN:			
IP Address:			
Owner/Assignee	-Select-	-	

The Migration Object Entry Form page appears.

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

The following page appears.

B Migration Object En	ry Form		_ ¤ ×
Select Object Types :	Add Code Mappings	Next	Cancel
E → EDW E → Mapp - → Map -	ngs Map rhal Status Crosswalk nder Crosswalk walks ngs Codes for Zoonotic bacterial dis Duberculosis Codes Code for intestinal infectious Dise 2gory		

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

The Migration Object Entry Form page reappears.

Migration Object Entry For	m		_ <b>= ×</b>
Select Object Types : Add	d Code Mappings	▼ Previo	ous Save Cancel
Object Description:			
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	•	
DSN:			]
IP Address:			]
Migration To:	DEV	•	
DSN:			]
IP Address:			]
Owner/Assignee	-Select-	•	

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.
Description	For example: The release object is a code map under the EDW category.
	Specifies the live date and time of the release object.
Live Date /	For example, 04/03/2020 9:30 AM.
Time	Live Date is autopopulated and it is same as the release date.
	Enter the Live Time in HH : MM format.
	Specifies the migration date and time of the release object from a release environment.
Migration	For example, 04/30/2020 9:30 PM.
Date / Time	Use 📰 to enter the migration date. Enter the migration time in the HH : MM format.
	The Migration Date cannot exceed the Live Date.
·	Specifies the current release environment of the release object.
Migration From	For example, DEV.
TIOM	You can create release environments in the <u>Release Manager Settings</u> .
DSN	Specifies the DSN name from where the release object is being migrated.
0310	For example, ErwinDIS931.
IP Address	Specifies the IP Address from where the release object is being migrated.
IF AUULESS	For example, 10.32.445.21
Migration	Specifies the release environment to which the release object is being migrated.
То	For example, TEST.
	You can create release environments in the <u>Release Manager Settings</u> .
DCN	Specifies the DSN name to which the release object is being migrated.
DSN	For example, ErwinDIS932.
IP Address	Specifies the IP address to which the release object is being migrated.
IF AUULESS	For example, 10.31.447.22
Owner /	Specifies the User ID of the release object's owner.

Field Name	Description
	For example, jdoe.
Assignee	The option list appears based on the users created in the Resource Man-
Assignee	ager. For more information on creating users, refer to the Creating Users
	and Assigning Roles topic.

#### 7. Click Save.

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

	DATA INTELLIGENCE SUITE	Release Manager										۹	¢ 0	
•	Calendar View Proje	ct View Release View	Misce	llaneous										
Sel	lect Project* Project_Name	▼ Selec	t Release* R	elease_Name	•		Add R	telease	Edit Release	Generate Release Pla	n Activity l	.og Delete R	elease	Share
	Nov 2019 <b>29</b> Fri Change C Release O	se_Name	elease Summar	y - By Status	PENDING APPRO		elease Summ	ary - By Ow		く igned - 5	Release Sur	Code	Map - 1 Set - 1 Iem - 2	
	ease Object Details	▼ Select	User ALL		<b>•</b>	Select Type ALL			<b>•</b> ①		Add Object	Move Objects	Promote	Maps
	Object Name	Object Status	Туре	Version	Date/Time		Migration D	etails	Owner		Create Date	Options		
					Live Date	Migration Date	From	To						
1	K_New_Mapping	PENDING APPROVAL	Data Item	1.00	11/29/2019/HH:M/	11/29/2019/HH:M	Production	PROD		Administrator	11/29/2019	/ 0 ±	¥ ¥	Ð
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:M/	11/29/2019/HH:M	DEV	TEST		Administrator	11/29/2019	/ 0 ±	¥ ¥	Ð
3	Sales_Codeset	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:M/	11/29/2019/HH:M	DEV	DEV		Administrator	12/02/2019	/ 0 1	¥ ×	Ð
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:M/	11/29/2019/HH:M	DEV	DEV		Administrator	12/02/2019	/01	¥ ×	Ð
5	New_Codeset_Map	PENDING APPROVAL	Code Map	1.01	11/29/2019/HH:M/	11/29/2019/HH:M	DEV	TEST		Administrator	12/02/2019	/ 0 1	¥ ×	Ð
		1	К	< Reco	rds from 1 to 5	> >I 🜔 Pa	ge 1 🗸 🗐	5 rows per	page 🗸					

8. Use the following options:

# Edit 🖍)

To edit, the release object, click 🖍.

You can update the <u>release object status</u> only by editing a release object.

# Information (10)

To view the mapping information, click ①.

### Download (土)

To download the release object details, click  $\pm$ .

### Email (ĭ)

To send email notification about the release object click  $\blacksquare$ .

#### Delete (X)

To delete the release object, click **X**.

# **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 <u>Con</u>-figuring Release Object Types topic.

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

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

1	DATA INTELLIGENCE	Project Vie	ase Manager	ase View	Misso	laneous								Search Q 🌣 🖉
• Proj	ject Listing :	Flojeci vie	w Reie	USE AIEM	Misce	muneous		Ade	l Project	Export to R	Exce		Share	Project Details
ŧ	Project Name	Owner	Lasi On	ł Activity	# of Releases	# of Release Objects	Created By	Create Date	Last Modifi Date	ied O	ptio	ns		Project_Name
		•	•				•							Description:
1	EDW	Kartik Srid	har 11/2	9/2019	4	6	Administrator	10/18/2018			۰.	ŧ,	ĸЭ	
2	New_Project	Resource	_Name 10/1	7/2019	2	1	Administrator	09/11/2019		/	'	ŧ,	<b>K</b> 19	Resource Email:
3	Project_Name	Joe Viller	s 11/2	8/2019	1	0	Administrator	11/28/2019		/		ŧ,	K A	Release Summary - By Status
Rele	ease Listing for : Proje Release Name	ect_Name Release Date	Release Owne	er Change #	e Control 🛛 🖡	Release Status	Created By	d Release Ge Create Date	Last Modified Date	Plan Option:		ort to	Excel	PENDING APPROVAL
	•		•			٣	•							Release Summary - By Owner
	Release_Name	11/28/2019			F	PENDING APPROVAL	Administrator	11/28/2019		• /	' ;	ŧ,	K A	
1														

The release listing of the required project appears.

2. Click the required <Release\_Name>.

The Release View page appears.

3. Click Add Object.

The Migration Object Entry Form page appears.

B Migration Object Entry For	m		_ <b>□</b> ×
Select Object Types : Add	d Miscellaneous Objects	•	Save Cancel
Object Name:*			
Object Description:			
Object Type:	DDL Script	¥	
Choose File:	Choose File No file cho	osen	
Live Date / Time:*	11/29/2019	HH:MM AM/PM	
Migration Date / Time:*	11/29/2019	HH:MM AM/PM	
Migration From:	DEV	-	
DSN:			
IP Address:			
Migration To:	DEV	•	
DSN:			
IP Address:			
Owner/Assignee	-Select-	-	

- 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	Specifies the name of the release object being added to the release.
Name	For example, AdventureWorks_DDL.
Object	Specifies the description about the release object.
Object Description	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 <u>add object type</u> 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.
	Specifies the live date and time of the release object.
Live Date /	For example, 04/03/2020 9:30 AM.
Time	Live Date is autopopulated and it is same as the release date.
	Enter the Live Time in HH : MM format.
	Specifies the migration date and time of the release object from a release
	environment.
Migration	For example, 04/30/2020 9:30 PM.
Date / Time	Use 🥅 to enter the migration date. Enter the migration time in the HH :
	MM format.
	The Migration Date cannot exceed the Live Date.
Migration	Specifies the current release environment of the release object.
From	For example, DEV.
	You can create release environments in the <u>Release Manager Settings</u> .
DSN	Specifies the DSN name from where the release object is being migrated.
	For example, ErwinDIS931.
IP Address	Specifies the IP Address from where the release object is being migrated.
	For example, 10.32.445.21
	Specifies the release environment to which the release object is being
Migration	migrated.
То	For example, TEST.
	You can create release environments in the <u>Release Manager Settings</u> .
DSN	Specifies the DSN name to which the release object is being migrated.
DSIN	For example, ErwinDIS932.
IP Address	Specifies the IP address to which the release object is being migrated.
	For example, 10.31.447.22
	Specifies the User ID of the release object's owner.
Owner / Assignee	For example, jdoe.
A SSIGNEE	The option list appears based on the users created in the Resource Man-

Field Name	Description
	ager. For more information on creating users, refer to the Creating Users
	and Assigning Roles topic.

#### 6. Click Save.

The release object is added to the release.

	NTELLIGENCE SUITE dar View Proje	ct View Release View	Miscell	aneous										
Select Proje	rct* Project_Name	- Selec	t Release* Re	lease_Name	•		Add R	lelease E	dit Release G	enerate Release Pla	n Activity Lo	Dele	te Release	Share
Nov 2	9 Change C	se_Name	lease Summary	- By Status	PENDING APPRO		elease Summa	ary - By Own	unassig	<b>&lt;</b> ined - 4	Release Sun	25% Ci Do	Type ode Set - 1 ita Item - 2 DL Script -	
elease Obj														
Select Statu	JS ALL	▼ Select	User ALL		•	Select Type ALL			• (J)		Add Object	Move Objec	ts Pro	mote Maps
Select Statu # Object		Select Object Status	User ALL	Version	▼ S	Select Type ALL	Migration De	etails	▼ () Owner	Created By	Add Object Create Date	Move Object		mote Maps
				Version		Select Type ALL Migration Date	Migration De From	etails To		Created By				mote Maps
ŧ Object				Version	Date/Time Live Date		From			Created By Administration	Create Date	Options		mote Maps
Object	Name Mapping	Object Status	Туре		Date/Time Live Date 11/29/2019/HH:M/	Migration Date	From Production	То			Create Date	Options	£≊	
Object	Hame Mapping Iap	Object Status PENDING APPROVAL	<b>Type</b> Data Item	1.00	Date/Time           Live Date           11/29/2019/HH:MI           11/29/2019/HH:MI	Migration Date	From Production DEV	To PROD		Administrator	Create Date 11/29/2019 11/29/2019	Options	t≊ t	×Đ

7. Use the following options:

## Edit 🖍

To edit, the release object, click 🖊.

You can update the <u>release object status</u> only by editing a release object.

# Information (1)

To view the mapping information, click ①.

### Download (土)

To download the release object details, click  $\pm$ .

### Email (ĭ)

To send email notification about the release object click  $\blacksquare$ .

#### Delete (X)

To delete the release object, click **X**.

# **Moving Release Objects**

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



3

To move release objects, follow these steps:

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

The release	listing of the	e required	l project	appears.
-------------	----------------	------------	-----------	----------

4 Pro	ject Listing :	Project View	-				Add	Project	Export to I	iveel		are	Project Details	
							_					are		
Ŧ	Project Name	Owner	Last Acti On	ivity # of Releases	# of Release Objects	Created By	Create Date	Last Modi Date	fied C	ption	s		Project_Name	
			*			•							Description:	
1	EDW	Kartik Sridhar	11/29/20	19 4	6	Administrator	10/18/2018		/	' ±	×	Ð	Resource Name: Joe Villers	
2	New_Project	Resource_Nan	me 10/17/20	19 2	1	Administrator	09/11/2019		/	' t	×	Ð	Resource Email:	
3	Project_Name	Joe Villers	11/28/20	19 1	0	Administrator	11/28/2019		/	' ±	×	Ð	Release Summary - By Status	
Rel	ease Listing for : Proje	ct_Name			10000000	لم ا	d Release Ger	nerate Release	Plan	Ехро	rt to E	xcel		_
	ease Listing for : Proje Release Name		lease Owner C	Change Control	Release Status	Created By	d Release Ger Create Date	Last Modified Date	Plan Option		rt to E	xoel		PENDING APPROVAL
		Release Rel	lease Owner C #	Change Control	Release Status ¥		Create	Last Modified			rt to E	koel	Release Summary - By Owner	PENDING APPROVAL
Rel #	Release Name	Release Rel	*			Created By	Create	Last Modified		3			Release Summary - By Owner	PENDING APPROVAL

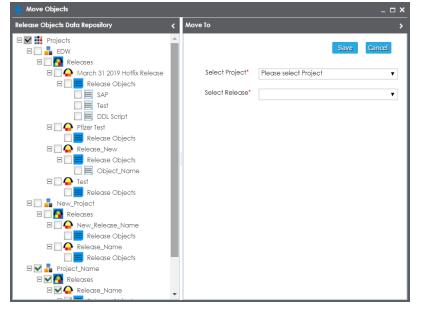
2. Click the required <Release Name>.

The Release View page appears showing the release object details.

	Calendar View	Project View Release Vie	w Miscell	aneous											
el	ect Project* Project_Na	me 🔽 Sele	ct Release* Re	lease_Name	•		Add R	elease	dit Release Ge	nerate Release Pla	n Activity L	og De	lete Rele	ease	Shar
	29 Fri Descri	ease_Name	telease Summary	- By Status	PENDING APPROV		lease Summo	ary - By Owr	unassig	<b>∢</b> ned-5	Release Sun	20%		t - 1 n - 2	
Ì	AFFROVAL							1008			40%		DDL Scrip	ot - 1	
Sel	ase Object Details ect Status ALL		t User ALL	007	<b>•</b> 5	ielect Type ALL		1005	• (J			Move Obj		promote	е Мар
Sel	rase Object Details	Select Object Status		Version	S Date/Time	ielect Type ALL	Migration De		• U Owner				ects		е Мар
e	ase Object Details ect Status ALL		t User ALL			ielect Type ALL Migration Date	Migration De From				Add Object	Move Obj	ects		е Мар
e	ase Object Details ect Status ALL		t User ALL		Date/Time Live Date		From	etails			Add Object Create Date	Move Obj Option	ects	Promote	
e	ase Object Defails ect Status ALL Object Name	Object Status	t User ALL Type	Version	Date/Time Live Date 11/29/2019/HH:WM	Migration Date	From Production	etails To		Created By	Add Object Create Date 11/29/2019	Move Obj Option	ects ns	Promote	÷ ۴
ə	ase Object Details ect Stotus ALL Object Name K, New_Mapping	Object Status PENDING APPROVAL	t User ALL Type Data Item	Version 1.00	Date/Time Live Date 11/29/2019/HH:MM 11/29/2019/HH:MM	Migration Date	From Production DEV	etails To PROD		Created By Administrator	Add Object Create Date 11/29/2019 11/29/2019	Move Obj Option	ects ns ) ± i	Promote	1 A

3. Click Move Object.

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



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.

Calendar View Project	elease Manager View Release View <b>N</b>	liscellaneous		Search Q 🗘	08
Environments Forr	ms Settings				
/					
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.

DATA INTELLIGENCE SUIT	E Release Mar	nager		Search	९ 🌣 🖉 🖪
Calendar View	Project View	Release View	Miscellaneous		•
Environments	Forms	Settings			•
Project Sorting E Project Name Owner Created Date Last Modified Sorting On Acc Desc	9		Release Sorting By         Image: Release Name         Owner         Release Status         Release Date         Created Date         Last Modified Date         Sorting On         Image: Asc         Desc		

- 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.

	DATA INTELLIGENCE SUITE Release Manager					h	Q	۵	0	8
•	Calendar View	Project View	Release View	Miscellaneous						•
4	Environments	Forms	Settings							•
Ø	<b>&gt;</b>									
	Project Sorting 1 Project Nam Owner Created Dat Last Modified Sorting On Asc Desc	e		Release Sorting By         Owner         Release Status         Release Date         Created Date         Last Modified Date         Sorting On         Asc         Desc						

- 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.