

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 | | | | | | | | | | |
| TechPubs (3) Tech Pubs 06 (0) | • | 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:

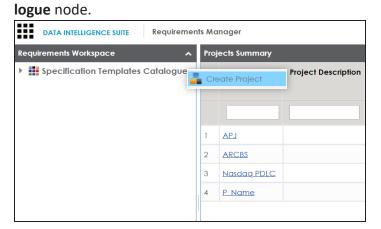
- Creating and managing projects
- Creating and managing specifications
- Linking the requirements to mappings

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≘ j ≘ 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 | | | | | | | | | | |
| EDW (1) APJ (1) | * | Specifica Id | Specification Name | Subject Hierarchy | Specification Description | Status | Created By | Created Date | Modified By | Modified Date | Edit | Delete | Histor |
| Access (1) Access (1) | | | | | | | | | | | | | |
| P_Name (1) erwin_Sales (2) | 1 | 11 | <u>S Name</u> | EDW | | Pending Rev | Administrator | 11/05/2019 15:57:20 | Administrator | 11/05/2019 15:57:20 | / | × | G |
| New_Project (1) | | | | | | | | | | | | | |

2. Click the Project Users tab.

| Requirements Workspace | 4 | Specifications Details | Project Details | | Project Users |
|--|------|------------------------|-----------------|--------------|---------------|
| Specification Templates Catalogue EDW (1) | Conl | igure Users | | | |
| APJ (1) APJ (1) Nasdaq PDLC (1) ARCBS (1) P_Name (1) erwin_Sates (2) New_Project (1) | # | 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 |
| TechPubsWriting (v1.00) TechPubs (2) | | | | | | | | | | | | | |
| | 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 | ÷ | | | | | | | |
| BDW (1) APJ (1) | # | Document Name | Document Description | | Document Owner | Document Status | Document Type | Docume |
| Arcbs (1) Arcbs (1) | | | | | | | | |
| P_Name (1) erwin_Sales (1) | | | | | | | | |
| Specifications Sales_Specs (v1.00) | | | | | | | | |
| 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 Approval Required Flag 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 Approval Required Flag 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) | | | | | | | | |
| Enrolments | | | | | | | | |
| _ | | | | | | | | |

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

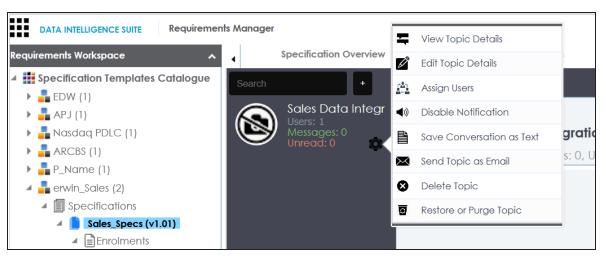
Managing Collaborations

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

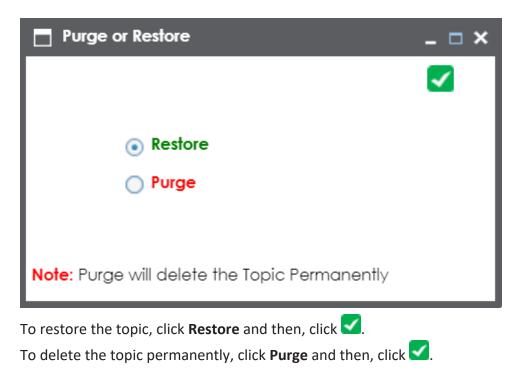
Use this option to delete the topic. The topic is deleted for all the assigned users.



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**.

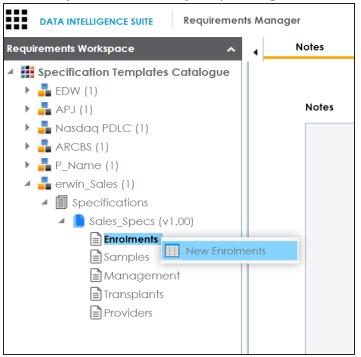


Creating Child Artifacts

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> ≡ ≣ | §≡ i ≡ | *≣ *≣ | |
| | | | | * |
| | | | | |
| 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 | | | | | |
| APJ (1) Masdaq PDLC (1) ARCBS (1) P_Name (1) | Project: erwin_Sales Owner: janedoe Status: Pending Review | | | | | 1 |
| erwin_Sales (2) Image: Specifications | 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 | | | | |
| Health_Check (v1.00) C_Project (1) C_Sales (1) | | Status | Draft | \sim | ^ | |
| | | Analyst | Select Analyst | ~ | | |
| | | Approval Date | | | | |
| Summary | | | <u>а</u> <u>н</u> в ∠ <u>п</u> | | | ~ |

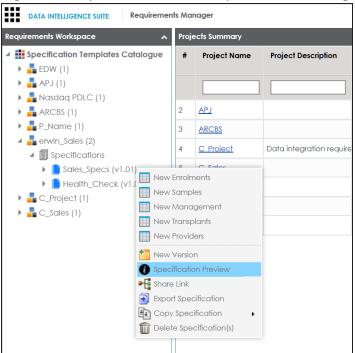
Managing Specifications

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

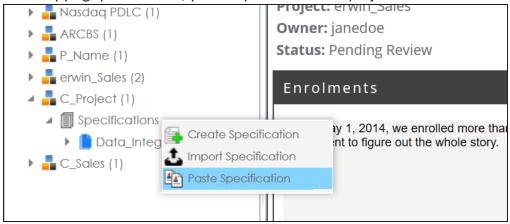
Use this option to copy specifications.

| 🔺 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

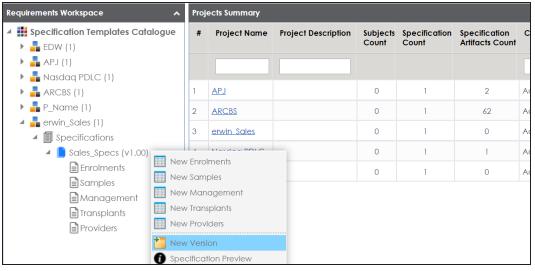
- Click the **Specifications** node. The specification Listing pager appears.
- Click .
 The Specification Details page appears in edit mode.
- Update the required fields and click .
 The specification is updated.

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> | | §= I = | ' <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. |

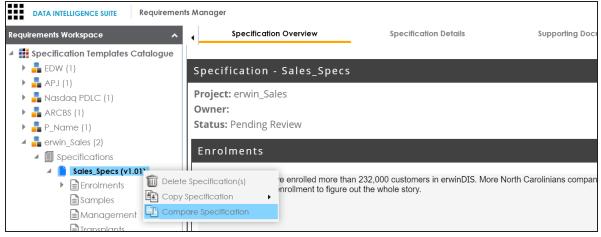
4. Click

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.

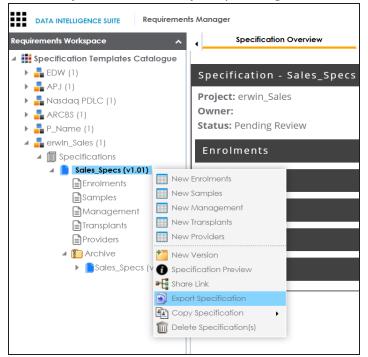
| | Specification 11/07/2019 | n Comparision Report | Date: | |
|--------------------------------------|---|---|-------|---|
| Specification: Project: Owner: | | Sales_Specs erwin_Sales | | |
| Status: Template: Version: | Pending Review Health Migration Template 1.01 | Pending Review Health Migration 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 | 4 | * |
|-----------------|----------------------|--------|---------------|----------|---|
| | | | | | |
| | | | | | |

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:

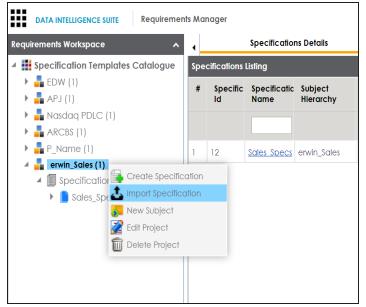
1. Unzip the exported specification.

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



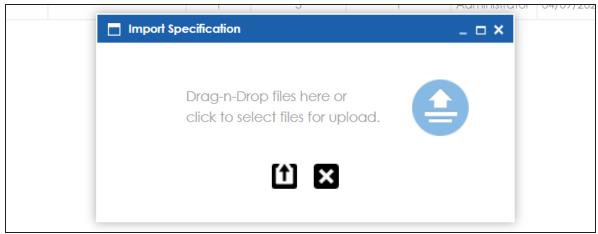
If you are importing the specification to the same project, then change the Specification Name and the Template Name in the .xml file. If you are importing the specification to a different project, you can import the .xml file as it is.

- 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 | Metadata 3rd Party Flat Files |
|---|-----------------------|-------------------------------|----------------------|-----------------------|----------------------------|-------------------------|---------------|--|
| 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 | Specification Artifi Lookup Reference Lookup On Trans Lookup Cor | Column | | nt | 4 |
| MappingTargets AdventureWorks_Migration (8) APJ_Demo (1) BBT (1) | 2 | A_System | A_Environment | Source Column Pr | ecision | - | . nt | 4 |
| BFSI Integration (1) Carrefour (9) Data Lake Migration (3) | 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 | Sp_Name (v1.00) | Administrator | 2019-10-17 11:56:07.883 | APJ (1) Assdaq PDLC (1) ARCBS (1) |
| | 4 | Administrator | 2019-10-16 15:44:32.383 | | Administrator | 2019-10-16 15:45:28.353 | P_Name (1) Image: Specifications Sp_Name (v1.00) |
| 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 | | |

| UI 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 | | 1 Tables | 2 Test Cases | 1 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 |

| UI Section | 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, × | د ۹ | cel | | PENDING APPROVAL | |
| * 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 | | • | V | Created By | Create Date | Last Modified | Options | | | | 100% | PENDING APPROVAL | |
| + | Release Name | Release Re Date | | • | V | 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.

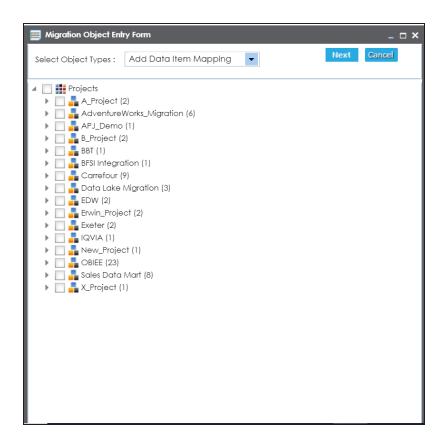
3. Click Add Object.

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 | | _ □ × |
|---------------------------|---------------------|-------------|--------------|
| 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 | Select | 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 | . M 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> ≼ ′ |
| | | 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 | | A | | |
| | Promote To | TEST | Effective Date | 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.

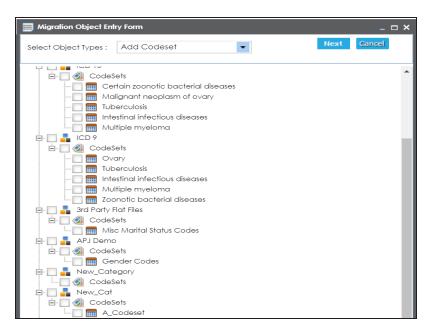
3. Click Add Object.

The Migration Object Entry Form page appears.

| Migration Object Entry | Form | _ - × |
|-------------------------|-----------------------------|--------------|
| 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 | | ▼ 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 | | _ □ × |
|------------------------------|-------------------------|-------------|--------------|
| 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 | | _ = × |
|----------------------------|-----------------|-------------|-----------------|
| 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 29 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 | | • | Select Type ALL | | | • 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, | K 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 | | _ □ × |
|------------------------------|-------------------------|-------------|--------------|
| 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 Browse 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 | < 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 | Type 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)

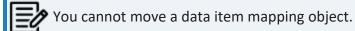
To send email notification about the release object click \blacksquare .

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 |

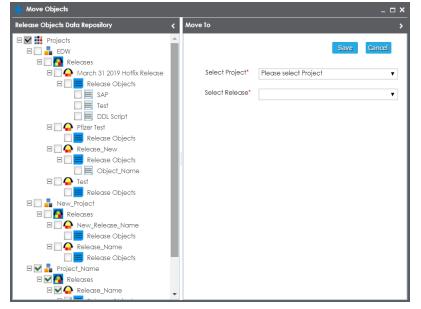
2. Click the required <Release Name>.

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 | ∢ 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 | • 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 N | 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 | > | | | | | | | | | |
| | 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.