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<td>94</td>
</tr>
</tbody>
</table>
Managing Life Cycles

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

- Requirements management is done via Requirements Manager. It involves standardizing functional requirements documentation, creating, collaborating, and customizing templates to manage functional requirements, and linking requirements to data mappings.

- Test management is done via Test Manager. It involves viewing and analyzing test specifications created under Metadata Manager and Mapping Manager.

- Release management is done via Release Manager. It involves creating and managing releases and release calendars. You can release data mappings, database objects, and release notes to standardize the release process.
Using Requirements Manager

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

The Requirements Manager dashboard appears:

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

Managing requirements involves the following:

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

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

To create projects, follow these steps:

1. Go to Application Menu > Data Catalog > Requirements Manager.
2. In the Requirements Workspace pane, right-click the Specification Templates Catalogue node.
3. Click Create Project.
   The Create Project page appears.
4. Enter Project Name and Project Description.
Creating Projects

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](image1)

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

   ![Requirements Workspace](image2)

3. Click **Configure Users**.

   The Assign/Unassign Users page appears.

   ![Assign/Unassign Users](image3)
4. Select one or more users to assign them to the project.

5. Click 📝.

   The selected users are assigned to the project.
Managing Projects

Managing projects involves:

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

To manage project, follow these steps:

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

2. Use the following options:

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

   **Edit Project**
Managing Projects

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

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

Delete Project

Use this option to delete the project.

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

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

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

To create specifications, follow these steps:

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

   The Create Specification page appears.

   ![Create Specification Page](image-url)
4. Enter appropriate values to the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specification Template Type</td>
<td>Displays a list of available specification templates. Select an appropriate template. You can create templates and add artifacts to templates under Requirements Manager Settings. For example, Health Migration Template.</td>
</tr>
<tr>
<td>Specification Template Description</td>
<td>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.</td>
</tr>
<tr>
<td>Specification Name</td>
<td>Specifies the name of the specification. For example, OrganMatch.</td>
</tr>
<tr>
<td>Specification Version</td>
<td>Specifies the version of the specification. For example, 1.01. Specification version is autopopulated. For more information on specification version, refer to the Configuring Version Display topic.</td>
</tr>
<tr>
<td>Version Label</td>
<td>Specifies the version label of the specification.</td>
</tr>
</tbody>
</table>
Creating Specifications

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specification</td>
<td>Specifies the description of the specification.</td>
</tr>
<tr>
<td>Description</td>
<td>For example: The specification uses the Health Migration Template to capture functional and business requirements of the data migration project.</td>
</tr>
<tr>
<td>Specification Owner</td>
<td>Specifies the specification owner's name.</td>
</tr>
<tr>
<td>Owner</td>
<td>For example, Jane Doe.</td>
</tr>
<tr>
<td>Status</td>
<td>Specifies the status of the specification.</td>
</tr>
<tr>
<td>For example</td>
<td>Pending Review.</td>
</tr>
<tr>
<td>Mail Comments</td>
<td>Specifies mail comments that are sent to project users.</td>
</tr>
<tr>
<td>Comments</td>
<td>For example: The specification uses the Health Migration Template. For more information on configuring email notifications, refer to the Configuring Email Settings topic.</td>
</tr>
</tbody>
</table>

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
- Adding Tasks
- Creating child artifacts

Right-click a specification in the Requirements Workspace pane to manage it. Managing specifications involves:

- Editing specifications
- Creating specification version

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Creating Specifications

- Sharing specification link
- Exporting and importing specifications
- Copying specifications
- Deleting specifications
Documenting Requirements

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

To document requirements, follow these steps:

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

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

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

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

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

To add supporting documents, follow these steps:

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

   The specification opens in a detailed view.

   ![Requirements Workspace](image)

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

   The following page appears.

   ![Supporting Documents Tab](image)

3. Click 📄

   The New Document Form page appears.

   ![New Document Form](image)
4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Name</strong></td>
<td>Specifies the name of the document being attached to the specification.</td>
</tr>
<tr>
<td></td>
<td>For example, Functional Requirements.</td>
</tr>
<tr>
<td><strong>Document Object</strong></td>
<td>Drag and drop document files or click ![image](document icon) to select and upload document files.</td>
</tr>
<tr>
<td><strong>Document Owner</strong></td>
<td>Specifies the document owner's name.</td>
</tr>
<tr>
<td><strong>Document Link</strong></td>
<td>Specifies the URL of the document.</td>
</tr>
<tr>
<td></td>
<td>For example, <a href="https://drive.google.com/file/d/1sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view">https://drive.google.com/file/d/1sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view</a></td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Specifies the description of the document.</td>
</tr>
<tr>
<td></td>
<td>For example: The document contains a detailed record of the functional requirements of the data integration project.</td>
</tr>
<tr>
<td><strong>Approval Required Flag</strong></td>
<td>Specifies whether the document requires approval.</td>
</tr>
<tr>
<td></td>
<td>Select the <strong>Approval Required Flag</strong> check box to select the document status.</td>
</tr>
<tr>
<td><strong>Document Status</strong></td>
<td>Specifies the status of the document.</td>
</tr>
<tr>
<td></td>
<td>For example, In Progress.</td>
</tr>
</tbody>
</table>
Adding Supporting Documents

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This field is available only when the <strong>Approval Required Flag</strong> check box is selected.</td>
</tr>
</tbody>
</table>

5. Click 📝.

The document is added to the Supporting Documents list.
Adding Tasks

You can start discussions on specifications or a relevant topic with your team using the My Action Center tab. To collaborate on specifications, you can create tasks depending on you requirement. By default, you can create to-do tasks, access requests, or issues. Apart from these task types, you can configure custom task types via Task Type Configuration.

To add tasks, follow these steps:

1. In the Requirements Workspace pane, select a specification. The specification opens in the detailed view.
2. Click the My Action Center tab.
3. Click \[\text{Create New Task}\]. A list of task types appears.
4. Click the required task type. The Create New Task page appears.
5. Enter appropriate values in the fields. Refer to the following table for field descriptions.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task is being created on Asset</td>
<td>Specifies the asset for which the task is created. This field autopopulates with the map name.</td>
</tr>
<tr>
<td>With Task Type as</td>
<td>Specifies the task type. For example, To do Task.</td>
</tr>
<tr>
<td>Name</td>
<td>Specifies the name of the task. By default, it autopopulates with a name in the following format: Mapping_&lt;Map_Name&gt;. You can edit it and rename the task. For example, Test Mappings.</td>
</tr>
<tr>
<td>Description</td>
<td>Specifies a description of a task. For example: Test all the mappings and record the effort required.</td>
</tr>
</tbody>
</table>
Adding Tasks

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Important</td>
<td>Specifies whether the task is important</td>
</tr>
<tr>
<td>Due</td>
<td>Specifies the due date of the task. Use 🗓️ to set the due date.</td>
</tr>
<tr>
<td>Assign Users</td>
<td>Specifies the users assigned to the task. You can assign DI and BU users from the list. For example, Richard Cooper.</td>
</tr>
<tr>
<td>External user emails</td>
<td>Specifies the email ID of external users. For example, <a href="mailto:chris.harris@quest.com">chris.harris@quest.com</a></td>
</tr>
</tbody>
</table>

6. Click 📋.
   The task is created and saved. Use ✍️ to edit the task details and attach relevant documents.

Chat

Use the Chat tab to send messages to the assigned and external users of a task.

On the Chat tab, enter your message in the text box and use the following options:

Assigned
   Use this option to send messages to the assigned users.

External Users
   Use this option to send messages to external users.

Users are notified via Messaging Center.
Adding Tasks

Once you have created a new task, you can manage them. Managing collaborations involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading Chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

With the My Action Center tab, you can filter and search tasks based on its status and assignments. For more information on search and filter mechanisms, refer to the Filter and Search topic.

Configuring Task Types

You can start discussions on specifications or a relevant topic with your team using the My Action Center tab. To collaborate on specifications, you can create tasks depending on your requirement. By default, you can create to-do tasks, access requests, or issues. Apart from these task types, you can configure custom task types via Task Type Configuration.

You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue are available. You cannot edit or delete these task types.

To configure task types, follow these steps:

1. In the utility section, click 

   The Task Type Configuration pane appears. It displays a list of available task types.
2. In the Add New Task Type box, enter a new task type in the space provided and click +.

The task type is added in the list of available tasks.

For example, in the following image, a task type, Schedule Job is added.
Adding Tasks

Use the following options to manage task types:

**Edit** (-pencil)  
Use this option to edit the task type.

**Delete** (-bin)  
Use this option to delete a task type.
Managing Tasks

Managing tasks involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

To mark tasks complete, on a task tile, click the radio button.

The task is moved to the list of completed task.

For example, in the following image, the task, Add Business rule is marked complete.

To further manage tasks, follow these steps:

1. On a task tile, click ✗.
   
The available options appear.
2. Use the following options to work on tasks:

**View Task Details**
Use this option to view task details. These details include task name, description, assigned assets, attached documents, and so on.

Alternatively, you can also click a task tile to view its details.

**Edit Task Details**
Use this option to update task details.

**Disable Notification**
Use this option to stop receiving notifications related to a task. By default, notifications are enabled, and users assigned to a task receive them.

**Download Chat as Text**
Use this option to download chat related to a task in the TXT format.

**Send Chat as Email**
Use this option to share the chat related to a task via an email. Click Send Chat as Email.
The Email Selection page appears. It displays a list of users assigned to the task.
Select the required users, and then click 💌. An email is sent to the selected users.

**Mark as Pending**

This option is available for a completed task. Use this option to mark a task as pending.

To delete a task, on a task tile, click ✗.

📝 You can delete a task only if you have created it.
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.
3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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

4. Click ✅.

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

Specification: Sales_Specs
Project: erwin_Sales
Owner: Jane Doe
Status: Pending Review

Enrollments

As of May 1, 2014, we enrolled more than 250,000 customers in enwiDX. More North Carolinians companies in health insurance purchased enwiDX. We need to explore the enrollment to figure out the whole story.

Enrollments from Health Care

Status: Draft

Analyst: Select Analyst

Approval Date:
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
Managing Specifications

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

Specification Preview

Use this option to preview the specification.

Share Link

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

Export Specification

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

Copy Specification

Use this option to copy specifications.
Use one of the following options:

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

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

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

Edit Specifications

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

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

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

To create specification versions, follow these steps:

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

2. Click New Version.

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specification Name</td>
<td>Specifies the name of the specification. For example, OrganMatch.</td>
</tr>
<tr>
<td>Specification Version</td>
<td>Specifies the new version of the specification. For example, 1.02.</td>
</tr>
<tr>
<td>Version Label</td>
<td>Specifies the version label of the specification. For example, Beta. For more information on configuring version display of specifications, refer to the Configuring Version Display of Specifications topic.</td>
</tr>
<tr>
<td>Change Description</td>
<td>Specifies the description of the changes made in the specifications. For example: A new child artifact was added to the specification template.</td>
</tr>
<tr>
<td>Mail Comments</td>
<td>Specifies the mail comments which are sent to the project users.</td>
</tr>
</tbody>
</table>
Creating Specification Versions

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolments</td>
<td>For example: The new version of the specification contains one more child artifact. For more information on sending mail comments to project users, refer to the Configuring Email Settings topic.</td>
</tr>
</tbody>
</table>

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.
### Creating Specification Versions

<table>
<thead>
<tr>
<th>Specification</th>
<th>Owner</th>
<th>Status</th>
<th>Template</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Specs</td>
<td>erwijn_sales</td>
<td>Pending Review</td>
<td>Health Migration Template</td>
<td>1.01</td>
</tr>
</tbody>
</table>

#### Enrolments:

- **Enrolments from Health Care:**
  - Status: Draft
  - Analyst: Select Analyst
  - Approval Date:
  - External Documentation Reference:
  - Comments:

#### Samples

- Management

- Transplants

- Providers
Exporting and Importing Specifications

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

To export specifications, follow these steps:

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

2. Click **Export Specification**.

   The Download File hyperlink appears in the notification area.
3. Click **Download File**.

The specification is downloaded as a .zip file.

You can create a specification by importing the exported specification.

To import a specification, follow these steps:

1. Unzip the exported specification.

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

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

2. Go to **Application Menu > Data Catalog > Requirements Manager**.

3. In the **Requirements Manager** pane, right-click a project.
4. Click **Import Specification**.

5. Drag and drop the .xml file or use ![upload icon] to browse the file.

6. Click ![up arrow].

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.


   A list of header columns appears.
4. Scroll down the list and select the **Specification Artifact** check box.
   The specification Artifact column becomes visible on the Mapping Specification tab.

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

6. Expand the project that contains the required specification.

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

8. Click ![image]

   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:

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

Once you have created test cases in the Mapping Manager and Metadata Manager, you can view and analyze them in the Test Manager.
Creating and Managing Test Cases

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

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

- Creating and Managing Test Cases for Mappings
- Creating and Managing Test Cases for Tables
Viewing and Analyzing Test Cases

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

To view and analyze test cases, follow these steps:

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

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

Project Statistics

Use this section to view the following information:

- **Projects**: It displays the number of projects in the Test Manager.
- **Mappings**: It displays the number of mappings with at least one map-level test case.
- **Tables**: It displays the number of tables with at least one metadata-level test case.
- **Test Cases**: It displays the count of total number of test cases in the Mapping Manager and Metadata Manager.
- **Test Steps**: It displays the total count of validation steps in all the test cases.

Project Test Case Status

Use this section to view the test case statuses in a pie chart. The test case status can be:
Viewing and Analyzing Test Cases

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

**Project Summary**

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

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

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

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

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

3. Click a test case to view its details.

The test case opens in a detailed view.

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

**Test Case Overview**

Use this tab to view the test case details.

**Validation Steps**

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

**Document Upload**

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

Expand *My Test Cases* node to browse the test cases you (logged in user) created.
Viewing and Analyzing Test Cases
Using Release Manager

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

<table>
<thead>
<tr>
<th>UI Section</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Browser Pane</td>
<td>Use this pane to browse through releases and miscellaneous options.</td>
</tr>
<tr>
<td></td>
<td>You can switch between different views to see releases:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Calendar View</strong>: Select this view to list the releases on a calendar</td>
</tr>
<tr>
<td></td>
<td>- <strong>Project View</strong>: Select this view to list the releases under a project.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Release View</strong>: Select this view to list release object details under a release.</td>
</tr>
<tr>
<td>2-Bottom Pane</td>
<td>Use this pane to view or work on the data based on your selection in the browser pane.</td>
</tr>
</tbody>
</table>

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.

2. Click Add Project.
   The New Project page appears.
3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name</td>
<td>Specifies the name of the project.</td>
</tr>
<tr>
<td></td>
<td>For example, EDW.</td>
</tr>
<tr>
<td>Project Description</td>
<td>Specifies the description about the project.</td>
</tr>
<tr>
<td></td>
<td>For example: List of releases targeted this spring.</td>
</tr>
<tr>
<td>Resource Name</td>
<td>Specifies the project owner's name.</td>
</tr>
<tr>
<td></td>
<td>For example, Jane Doe.</td>
</tr>
<tr>
<td>Resource Description</td>
<td>Specifies the description about the project owner.</td>
</tr>
<tr>
<td></td>
<td>For example: Jane Doe is the release manager of the organization.</td>
</tr>
<tr>
<td>Resource Cell Phone</td>
<td>Specifies the cell phone number of the project owner.</td>
</tr>
<tr>
<td></td>
<td>For example, +658374414288.</td>
</tr>
<tr>
<td>Resource Work Phone</td>
<td>Specifies the work phone number of the project owner.</td>
</tr>
<tr>
<td></td>
<td>For example, 1-800-783-7946.</td>
</tr>
<tr>
<td>Resource Email</td>
<td>Specifies the project owner's email address.</td>
</tr>
</tbody>
</table>
Creating Projects and Adding Releases

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>For example, <a href="mailto:jane.doe@mauris.edu">jane.doe@mauris.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

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.

2. Click **Add Release**.

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name</td>
<td>Specifies the project name for a release. For example, EDW.</td>
</tr>
<tr>
<td>Release Name</td>
<td>Specifies the name of the release. For example, Pfizer Test.</td>
</tr>
<tr>
<td>Release Description</td>
<td>Specifies the description about the release. For example: The release contains two release objects of the data item type.</td>
</tr>
<tr>
<td>Change Control Number</td>
<td>Specifies the change control number of the release. For example, v1.8.</td>
</tr>
<tr>
<td>Release Date</td>
<td>Specifies the date of the release. For example, 01/22/2020. Use YYYY/MM/DD to enter the release date.</td>
</tr>
<tr>
<td>Release Owner</td>
<td>Specifies the release owner's User ID. For example, jdoe.</td>
</tr>
</tbody>
</table>
Creating Projects and Adding Releases

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

4. Click **Save**.

The release is added to the selected project.

5. Use the following options:
   
   **View (可视)**
   
   To view the release details, click **可视**.

   **Edit (编辑)**
   
   To edit the release, click **编辑**.
   
   You can update the release status only by editing a release.

   **Download (下载)**
   
   To download the release details, click **下载**.
Creating Projects and Adding Releases

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 Release Manager Settings.
Adding Data Item Mappings as Release Objects

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

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

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

   The release listing of the project appears.

2. Click the required <Release_Name>.

   The Release View page appears showing the release object details.

3. Click **Add Object**.

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

   The following page appears.
5. Select the required mappings and click **Next**.

   The Migration Object Entry Form page reappears.
6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Description</td>
<td>Specifies the description about the release object being added to the release. For example: The release object is a data item mapping under the Datawarehouse project.</td>
</tr>
<tr>
<td>Live Date / Time</td>
<td>Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.</td>
</tr>
<tr>
<td>Migration Date / Time</td>
<td>Specifies the migration date and time of the release object from the DEV release environment.</td>
</tr>
</tbody>
</table>
Adding Data Item Mappings as Release Objects

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migration From</td>
<td>Specifies the current release environment of the release object.</td>
</tr>
<tr>
<td></td>
<td>This field is set to DEV by default.</td>
</tr>
<tr>
<td>DSN</td>
<td>Specifies the DSN name from where the release object is being migrated.</td>
</tr>
<tr>
<td></td>
<td>For example, ErwinDIS931.</td>
</tr>
<tr>
<td>IP Address</td>
<td>Specifies the IP Address from where the release object is being migrated.</td>
</tr>
<tr>
<td></td>
<td>For example, 10.32.445.21</td>
</tr>
<tr>
<td>Migration To</td>
<td>This field is set to DEV by default. You can use the Promote Map option to</td>
</tr>
<tr>
<td></td>
<td><a href="#">migrate the selected data item mappings</a> to the required release envir-</td>
</tr>
<tr>
<td></td>
<td>onment for the first time.</td>
</tr>
<tr>
<td>DSN</td>
<td>Specifies the DSN name to which the release object is being migrated.</td>
</tr>
<tr>
<td></td>
<td>For example, ErwinDIS932.</td>
</tr>
<tr>
<td>IP Address</td>
<td>Specifies the IP address to which the release object is being migrated.</td>
</tr>
<tr>
<td></td>
<td>For example, 10.31.447.22</td>
</tr>
<tr>
<td>Owner / Assignee</td>
<td>Specifies the User ID of the release object's owner.</td>
</tr>
<tr>
<td></td>
<td>For example, jdoe.</td>
</tr>
<tr>
<td></td>
<td>The option list appears based on the users created in the Resource Man-</td>
</tr>
<tr>
<td></td>
<td>nager. For more information on creating users, refer to the <a href="#">Creating Users</a></td>
</tr>
<tr>
<td></td>
<td>and Assigning Roles topic.</td>
</tr>
</tbody>
</table>

7. Click **Save**.

The data item mappings are added as release objects to the release.
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 (ℹ️)**
   To view the mapping information, click 📖.

**Download (💾)**
   To download the release object details, click 🖼.

**Email (✉️)**
   To send email notification about the release object click 💌.

**Delete (🗑️)**
   To delete the release object, click ✖️.
Adding Data Item Mappings as Release Objects
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.

2. Click the required `<Release_Name>`.

   The Release View tab appears.
3. In the **Release Object Details** section, click the required `<Data_Item_Mapping_Object>` and click **Promote Maps**.

The Promote Data Item Mappings page appears.

4. In **Data Item Repository**, select the required `<Map_Name>` check box.
5. **In Promotion Details**, enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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

6. **Click Validate.**

The Promotion Error Report appears, because corresponding promote system environments were not provided.
7. Double-click the corresponding cells to select the promote system environment for the mappings.

8. Click Save.

The promote system environments are assigned.
9. Click **Validate**.

   The promotion is successfully validated.

10. Click **Promote**.

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

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

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

1. Under the **Project View** tab, click the required project.
   
   The release listing of the required project appears.

2. Click the required <Release_Name>.
   
   The Release View page appears.

3. Click **Add Object**.
   
   The Migration Object Entry Form page appears.
4. In **Select Object Types**, select **Add Codeset**.

The following page appears.
5. Select the required codesets and click **Next**.

The Migration Object Entry Form page reappears.

6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.
## Adding Codeset as Release Objects

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Object Description</strong></td>
<td>Specifies the description about the release object being added to the release. For example: The release object is a codeset under the 3rd Party Flat Files category.</td>
</tr>
<tr>
<td><strong>Live Date / Time</strong></td>
<td>Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.</td>
</tr>
<tr>
<td><strong>Migration Date / Time</strong></td>
<td>Specifies the migration date and time of the release object from a release environment. 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.</td>
</tr>
<tr>
<td><strong>Migration From</strong></td>
<td>Specifies the current release environment of the release object. For example, DEV. You can create release environments in the <strong>Release Manager Settings</strong>.</td>
</tr>
<tr>
<td><strong>DSN</strong></td>
<td>Specifies the DSN name from where the release object is being migrated. For example, ErwinDIS931.</td>
</tr>
<tr>
<td><strong>IP Address</strong></td>
<td>Specifies the IP Address from where the release object is being migrated. For example, 10.32.445.21</td>
</tr>
<tr>
<td><strong>Migration To</strong></td>
<td>Specifies the release environment to which the release object is being migrated. For example, TEST. You can create release environments in the <strong>Release Manager Settings</strong>.</td>
</tr>
<tr>
<td><strong>DSN</strong></td>
<td>Specifies the DSN name to which the release object is being migrated. For example, ErwinDIS932.</td>
</tr>
<tr>
<td><strong>IP Address</strong></td>
<td>Specifies the IP address to which the release object is being migrated. For example, 10.31.447.22</td>
</tr>
</tbody>
</table>
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.

8. Use the following options:

**Edit (📝)**

To edit, the release object, click 🆓.

You can update the release object status only by editing a release object.

**Information (ℹ️)**

To view the mapping information, click 📘.
Adding Codeset as Release Objects

Download (comings)
To download the release object details, click ↓.

Email (✉)
To send email notification about the release object click ✉.

Delete (🗑)
To delete the release object, click🗑.
Adding Code Mappings as Release Objects

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

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

1. Under the **Project View** tab, click the required project.
   - The release listing of the required project appears.

2. Click the required `<Release_Name>`.
   - The Release View page appears showing the release object details.

3. Click **Add Object**.
   - The Migration Object Entry Form page appears.
4. In Select Object Types, select Add Code Mappings.

The following page appears.
5. Select the required code mappings and click **Next**.

The Migration Object Entry Form page reappears.

6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Object Description | Specifies the description about the release object being added to the release.  
For example: The release object is a code map under the EDW category. |
| Live Date / Time   | Specifies the live date and time of the release object.  
For example, 04/03/2020 9:30 AM.  
Live Date is autopopulated and it is same as the release date.  
Enter the Live Time in HH : MM format. |
| Migration Date / Time | Specifies the migration date and time of the release object from a release environment.  
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 From     | Specifies the current release environment of the release object.  
For example, DEV.  
You can create release environments in the Release Manager Settings. |
| 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 |
| Migration To       | Specifies the release environment to which the release object is being migrated.  
For example, TEST.  
You can create release environments in the Release Manager Settings. |
| 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.  
For example, 10.31.447.22 |
| Owner /            | Specifies the User ID of the release object's owner. |
Adding Code Mappings as Release Objects

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignee</td>
<td>For example, jdoe. The option list appears based on the users created in the Resource Manager. For more information on creating users, refer to the Creating Users and Assigning Roles topic.</td>
</tr>
</tbody>
</table>

7. **Click Save.**

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

8. **Use the following options:**

   **Edit (редактировать)**
   
   To edit, the release object, click 
   
   You can update the release object status only by editing a release object.

   **Information (информация)**
   
   To view the mapping information, click 
   
   **Download (скачать)**
   
   To download the release object details, click 
   
   **Email (электронная почта)**
Adding Code Mappings as Release Objects

To send email notification about the release object click ✉.

Delete (❌)

To delete the release object, click ❌.
Adding Miscellaneous Objects

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

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

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

   The release listing of the required project appears.

2. Click the required <Release_Name>.

   The Release View page appears.

3. Click Add Object.

   The Migration Object Entry Form page appears.
4. In **Select Object Types**, select **Add Miscellaneous Objects**.

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Name</td>
<td>Specifies the name of the release object being added to the release. For example, AdventureWorks_DDL.</td>
</tr>
<tr>
<td>Object Description</td>
<td>Specifies the description about the release object. For example: The release object is the DDL script of the AdventureWorks environment.</td>
</tr>
<tr>
<td>Object Type</td>
<td>Specifies the release object type. For example, DDL Script. You can <strong>add object type</strong> in the Release Manager Settings.</td>
</tr>
<tr>
<td>Choose File</td>
<td>Specifies the physical file being attached to the release object.</td>
</tr>
</tbody>
</table>
## Field Name | Description
---|---
Live Date / Time | Click **Browse** to select the file. Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.
Migration Date / Time | Specifies the migration date and time of the release object from a release environment. 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 From | Specifies the current release environment of the release object. For example, DEV. You can create release environments in the [Release Manager Settings](#).
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
Migration To | Specifies the release environment to which the release object is being migrated. For example, TEST. You can create release environments in the [Release Manager Settings](#).
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. For example, 10.31.447.22
Owner / Assignee | Specifies the User ID of the release object's owner. For example, jdoe. The option list appears based on the users created in the Resource Man-
Adding Miscellaneous Objects

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. Click **Save**.

The release object is added to the release.

7. Use the following options:

   **Edit (✏️)**
   
   To edit, the release object, click ✏️.
   
   You can update the **release object status** only by editing a release object.

   **Information (ℹ️)**
   
   To view the mapping information, click 🌐.

   **Download ( UNSIGNED )**
   
   To download the release object details, click 📞.

   **Email (✉️)**
   
   To send email notification about the release object click 📧.
Adding Miscellaneous Objects

Delete (×)

To delete the release object, click ×.
Moving Release Objects

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

You cannot move a data item mapping object.

To move release objects, follow these steps:

1. Under the **Project View** tab, click the required project.
   
   The release listing of the required project appears.

2. Click the required **Release Name**.
   
   The Release View page appears showing the release object details.
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.
Moving 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.

2. Click Settings.

   The following page appears.
3. Click.

4. Select the appropriate **Project Sorting By** option.

5. Select the appropriate **Sorting On** option.

6. Click **Save**.

   The project listings are sorted in the Project View.

You can sort release listings by:

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

To sort release listings, follow these steps:

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

3. Select the appropriate **Release Sorting By** option.

4. Select the appropriate **Sorting On** option.

5. Click **Save**.

   The release listings are sorted in the Project View.