



erwin Data Intelligence

Life Cycle Management Guide

Release v13.1

Legal Notices

This Documentation, which includes embedded help systems and electronically distributed materials (hereinafter referred to as the Documentation), is for your informational purposes only and is subject to change or withdrawal by Quest Software, Inc and/or its affiliates at any time. This Documentation is proprietary information of Quest Software, Inc and/or its affiliates and may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of Quest Software, Inc and/or its affiliates

If you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all Quest Software, Inc and/or its affiliates copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to Quest Software, Inc and/or its affiliates that all copies and partial copies of the Documentation have been returned to Quest Software, Inc and/or its affiliates or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, QUEST SOFTWARE, INC. PROVIDES THIS DOCUMENTATION AS IS WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL QUEST SOFTWARE, INC. BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF QUEST SOFTWARE, INC. IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is Quest Software, Inc and/or its affiliates Provided with Restricted Rights. Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2023 Quest Software, Inc. and/or its affiliates All rights reserved. All trade-marks, trade names, service marks, and logos referenced herein belong to their respective companies.

Contact erwin

Understanding your Support

Review [support maintenance programs and offerings](#).

Registering for Support

Access the [erwin support](#) site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for [erwin Data Intelligence \(erwin DI\)](#), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit <http://erwin.com/>.

Provide Feedback

If you have comments or questions, or feedback about erwin product documentation, you can send a message to distechpubs@erwin.com.

News and Events

Visit [News and Events](#) to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

Contents

Managing Life Cycles	7
Using Requirements Manager	8
Creating Projects	9
Configure Users	11
Managing Projects	13
Creating Specifications	15
Documenting Requirements	19
Adding Supporting Documents	20
Adding Tasks	23
Configuring Task Types	25
Managing Tasks	28
Creating Child Artifacts	31
Managing Specifications	34
Creating Specification Versions	38
Exporting and Importing Specifications	42
Linking Requirements to Data Mappings	45
Using Test Manager	47
Creating and Managing Test Cases	48
Viewing and Analyzing Test Cases	49
Using Release Manager	53
Creating Projects and Adding Releases	54
Adding Release Objects to Releases	59

Adding Data Item Mappings as Release Objects	60
Promoting Data Item Mappings	66
Adding Codeset as Release Objects	71
Adding Code Mappings as Release Objects	77
Adding Miscellaneous Objects	82
Moving Release Objects	86
Sorting Projects and Releases	88

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:

The screenshot displays the Requirements Manager dashboard. On the left, the 'Requirements Workspace' pane shows a tree view with 'TechPubs (3)' and 'Tech Pubs 06 (0)'. Below it is a 'Summary' section with a pie chart and a legend: Pending Review (blue), Pending Approval (yellow), Approved (green), Published (dark green), and Rejected (red). The main area is the 'Specifications Listing' table, which has columns for #, Specification Id, Specification Name, Subject Hierarchy, Specification Description, Status, Created By, Created Date, Modified By, Modified Date, Edit, Delete, and History. It lists three specifications, all with a status of 'Pending Rev' and created by 'Administrator'.

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

Managing requirements involves the following:

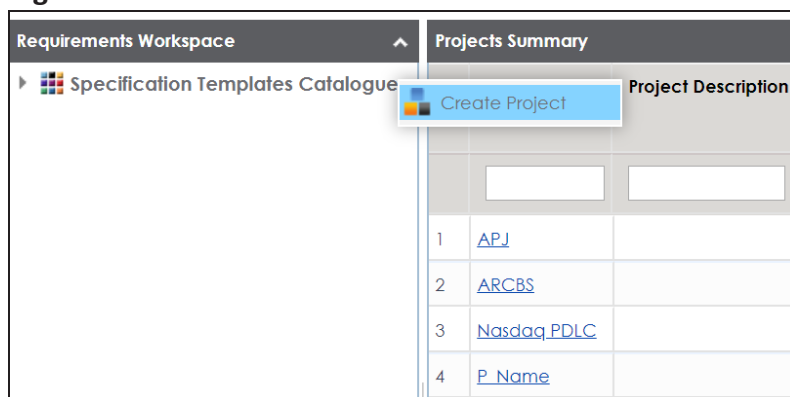
- [Creating and managing projects](#)
- [Creating and managing specifications](#)
- [Linking the requirements to mappings](#)

Creating Projects

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

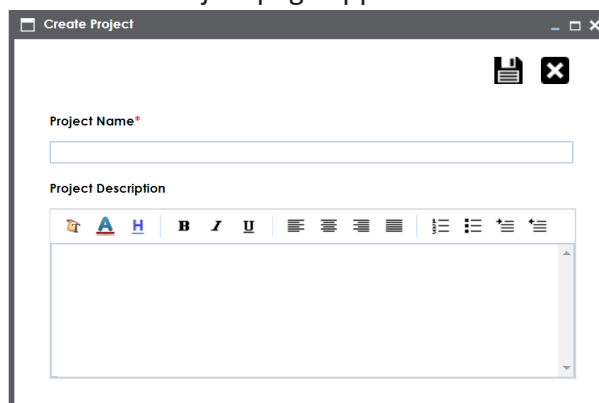
To create projects, follow these steps:

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



3. Click **Create Project**.

The Create Project page appears.



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

For example:

Creating Projects

- **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

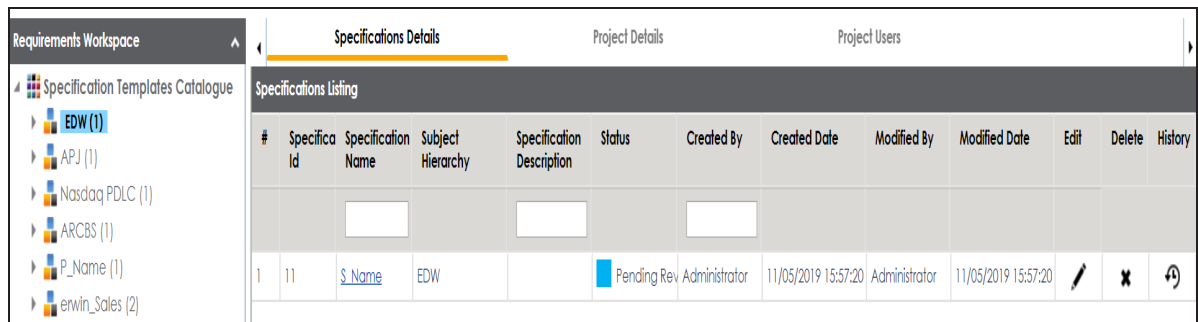
Configure Users

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.

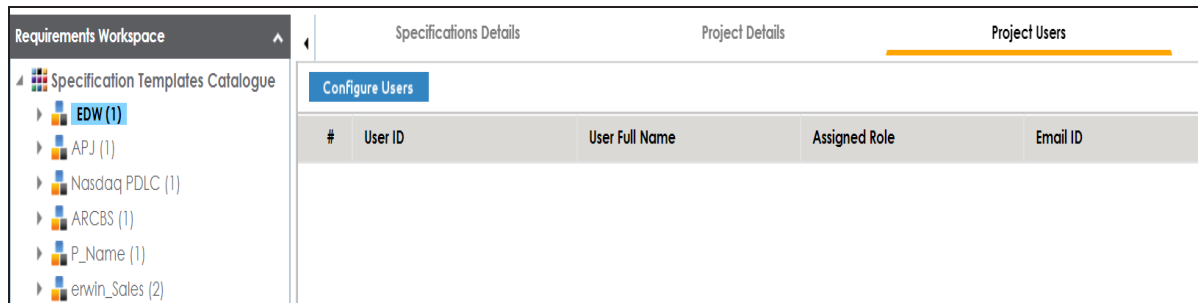
The following page appears.



The screenshot shows the 'Requirements Workspace' pane on the left with a tree view containing 'Specification Templates Catalogue' and several project folders like 'EDW (1)', 'APJ (1)', 'Nasdaq PDLC (1)', 'ARCBS (1)', 'P_Name (1)', and 'erwin_Sales (2)'. The main pane has three tabs: 'Specifications Details' (selected), 'Project Details', and 'Project Users'. Under 'Specifications Details', there is a 'Specifications Listing' table.

#	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	11	S_Name	EDW		Pending Rev	Administrator	11/05/2019 15:57:20	Administrator	11/05/2019 15:57:20			

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



The screenshot shows the same 'Requirements Workspace' pane. The main pane now has the 'Project Users' tab selected. A 'Configure Users' button is visible at the top of the main pane. Below it is a table with columns for '#', 'User ID', 'User Full Name', 'Assigned Role', and 'Email ID'.

#	User ID	User Full Name	Assigned Role	Email ID
---	---------	----------------	---------------	----------

3. Click **Configure Users**.

The Assign/Unassign Users page appears.

Configure Users

Assign/Unassign Users

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

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

5. Click .

The selected users are assigned to the project.

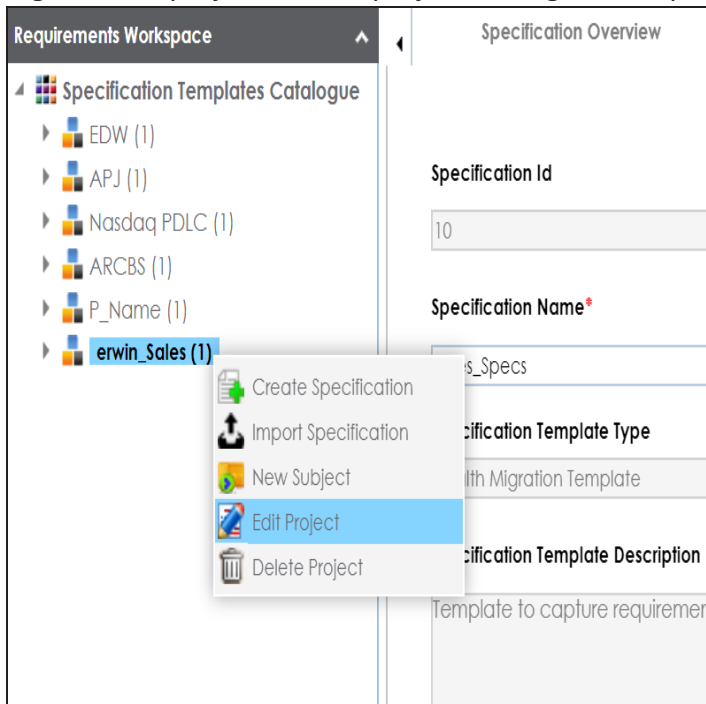
Managing Projects

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.

Requirements Workspace

Specifications Templates Catalogue

TechPubs (3)

Specifications

TechPubsWriting (v1.00)

TechPubs (2)

Specifications Details

Project Details

Project Users

Specifications Listing

#	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	1	TechPubsWriting	TechPubs		Pending Rev	Administrator	04/09/2020 03:44:43	Administrator	04/09/2020 03:44:43			
2	2	Trial	TechPubs/TechPub		Pending Rev	Administrator	07/22/2020 10:19:13	Administrator	07/22/2020 10:19:13			
3	3	Trial1	TechPubs/TechPub		Pending Rev	Administrator	07/22/2020 10:42:35	Administrator	07/22/2020 10:42:35			

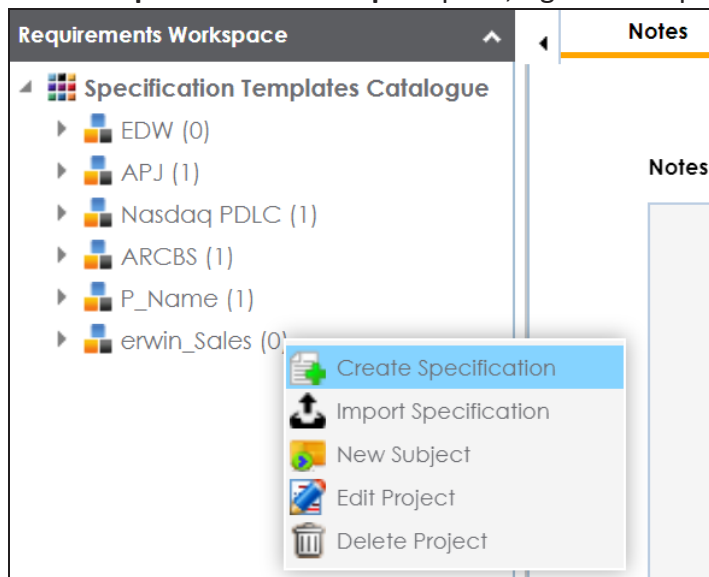
Creating Specifications

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.

Creating Specifications

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

Field Name	Description
Specification Template Type	Displays a list of available specification templates. Select an appropriate template. You can create templates and add artifacts to templates under Requirements Manager Settings . For example, Health Migration Template.
Specification Template Description	Displays the selected specification template type's description. For example: The Health Migration Template is to capture functional and business requirements of the data migration project.
Specification Name	Specifies the name of the specification. For example, OrganMatch.
Specification Version	Specifies the version of the specification. For example, 1.01. Specification version is autopopulated. For more information on specification version, refer to the Configuring Version Display topic.
Version Label	Specifies the version label of the specification.

Creating Specifications

Field Name	Description
	For example, Beta. For more information on specification version label, refer to the Configuring 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 Comments	Specifies mail comments that are sent to project users. For example: The specification uses the Health Migration Template. For more information on configuring email notifications, refer to the 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](#)
- [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

Creating Specifications

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

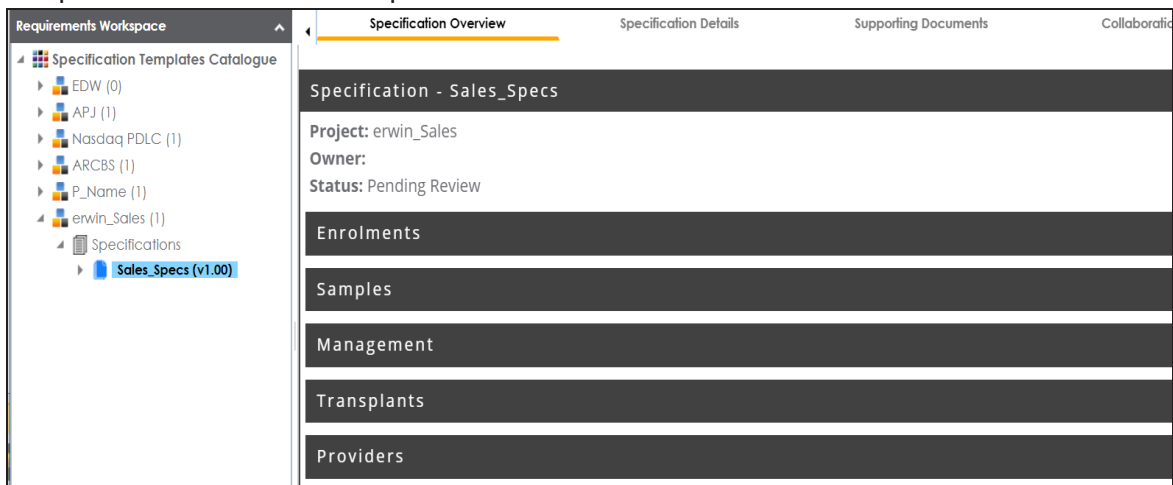
Documenting Requirements



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.

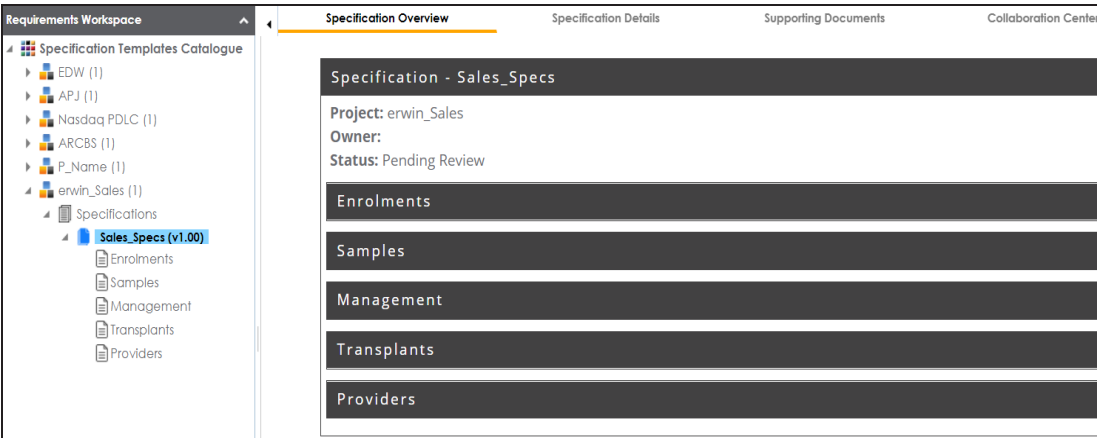
Adding Supporting Documents

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:

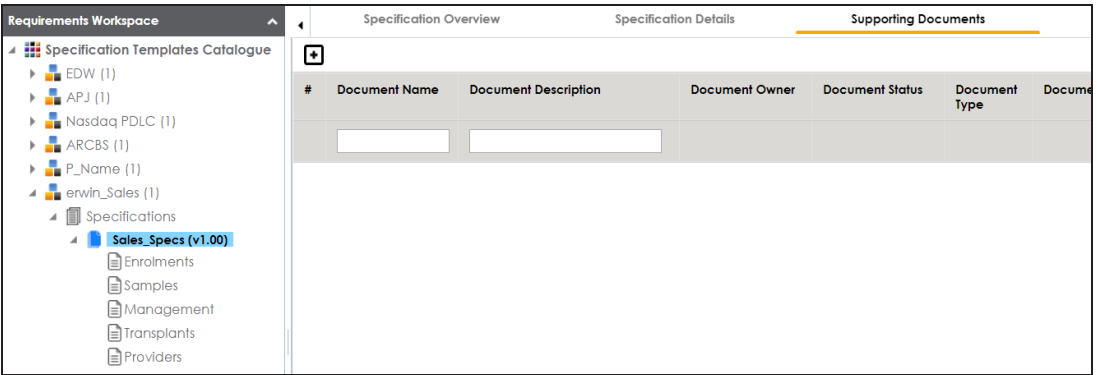
1. In the **Requirements Workspace** pane, select a specification.

The specification opens in a detailed view.



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

The following page appears.



3. Click .

The New Document Form page appears.

Adding Supporting Documents

New Document Form

Document Name*

Document Object Drag-n-Drop files here or click to select files for upload.

Document Owner

Document Link

Document Description

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 specification. For example, Functional Requirements.
Document Object	Drag and drop document files or click to select and upload document files.
Document Owner	Specifies the document owner's name.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/d/2sC2_SZlYeFKI7OOn-b5YkMBq4ptA7jhg5/view
Description	Specifies the description of the document. For example: The document contains a detailed record of the functional requirements of the data integration project.
Approval Required Flag	Specifies whether the document requires approval. Select the Approval Required Flag check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress.

Adding Supporting Documents

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.

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 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](#).

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 .
- 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.

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

Adding Tasks

Field Name	Description
Important	Specifies whether the task is important
Due	Specifies the due date of the task. Use 📅 to set the due date.
Assign Users	Specifies the users assigned to the task. You can assign DI and BU users from the list. For example, Richard Cooper.
External user emails	Specifies the email ID of external users. For example, chris.harris@quest.com

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:

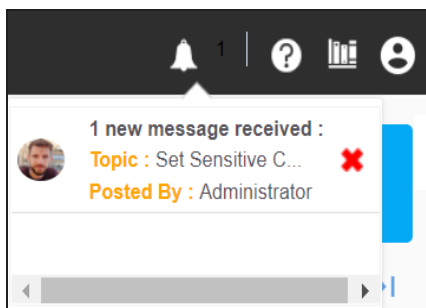
Assigned

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.

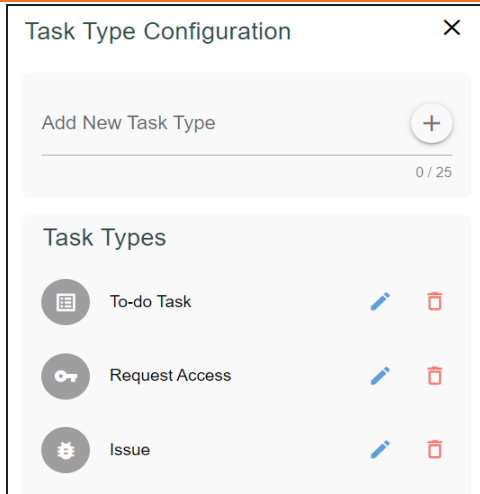
You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue, are available. You cannot edit or delete these task types.


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.

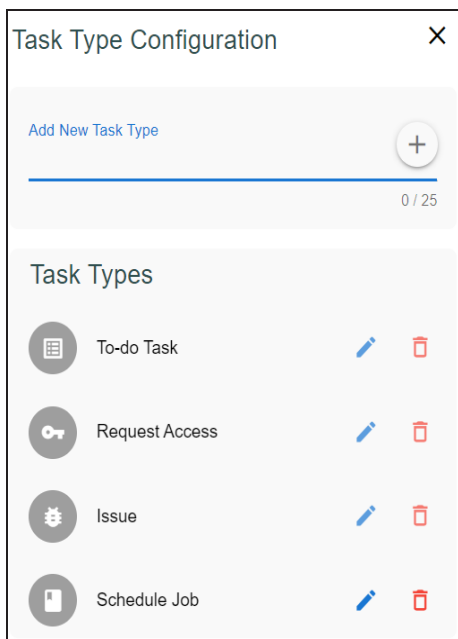
Adding Tasks



2. In the Add New Task Type box, enter a new task type and click .

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

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



Use the following options to manage task types:

Edit ()

Adding Tasks

Use this option to edit task types.

Delete ()

Use this option to delete task types.

Managing Tasks

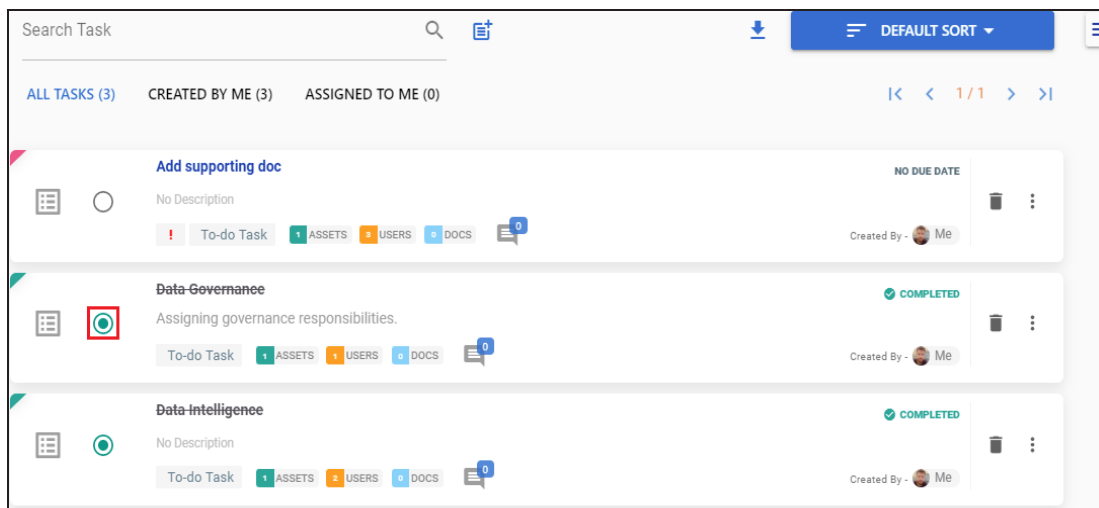
Managing tasks involves:

- 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.

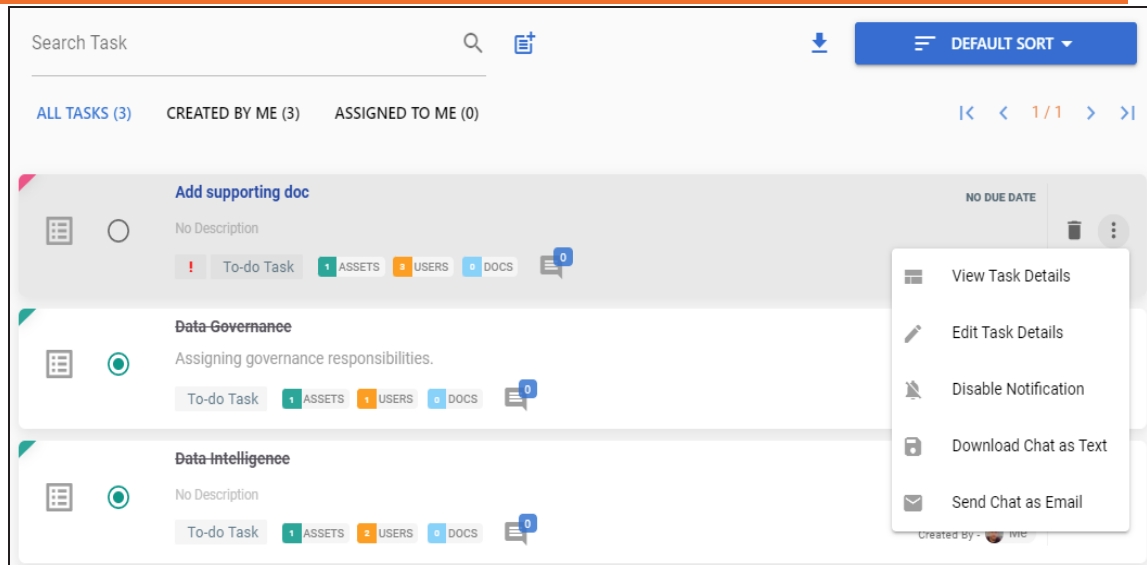


To further manage tasks, follow these steps:

1. On a task tile, click .

The available options appear.

Managing Tasks



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

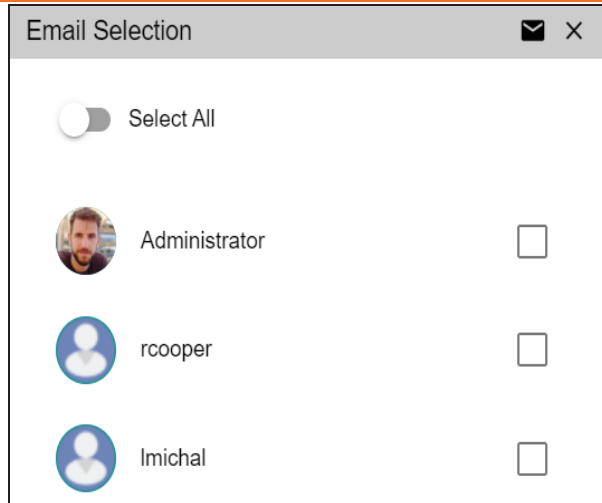
Use this option to download chat related to a task in the TXT format.


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.


Managing Tasks



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 .



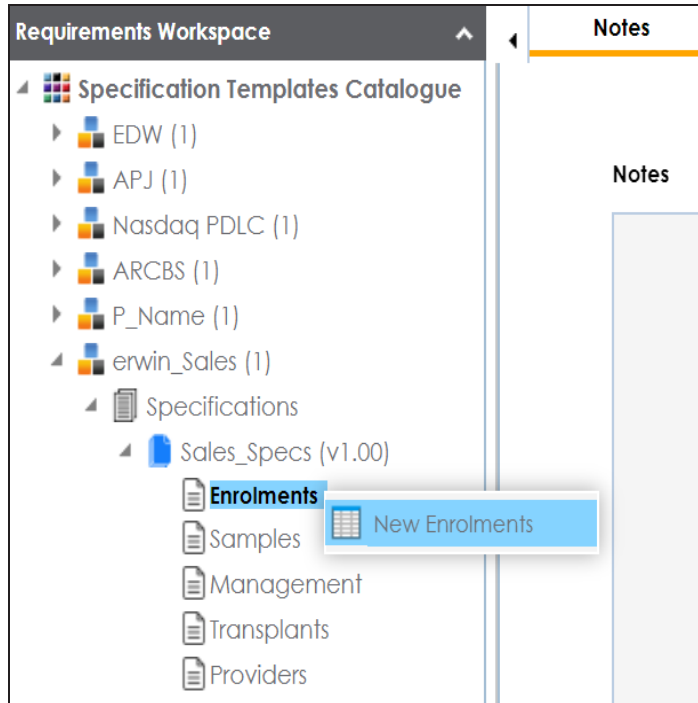
You can delete a task only if you have created it.

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:

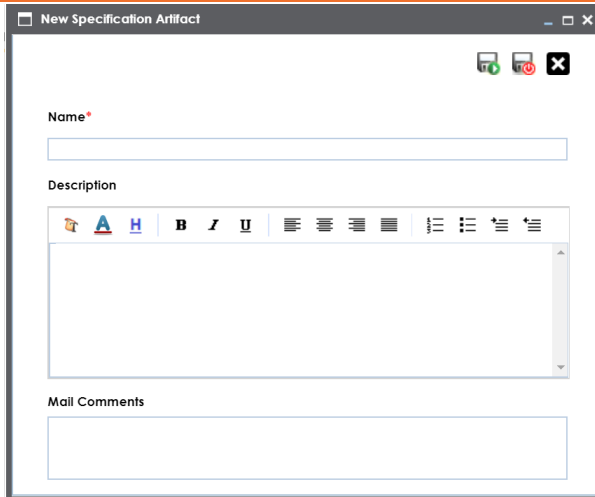
1. In the **Requirements Workspace** pane, right-click an artifact.



2. Click **New <Artifact_Name>**.

The New Specification Artifact page appears.

Creating Child Artifacts



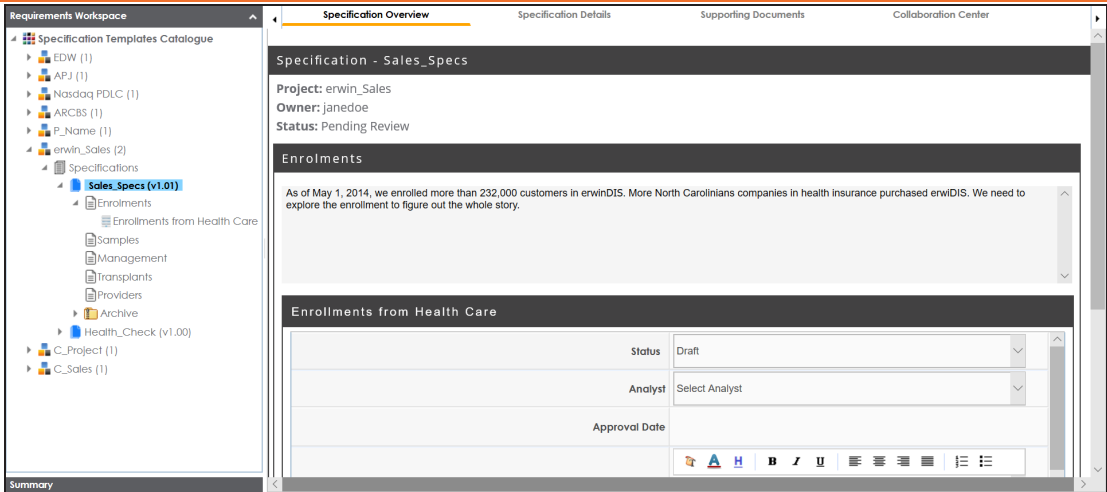
3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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

Creating Child Artifacts



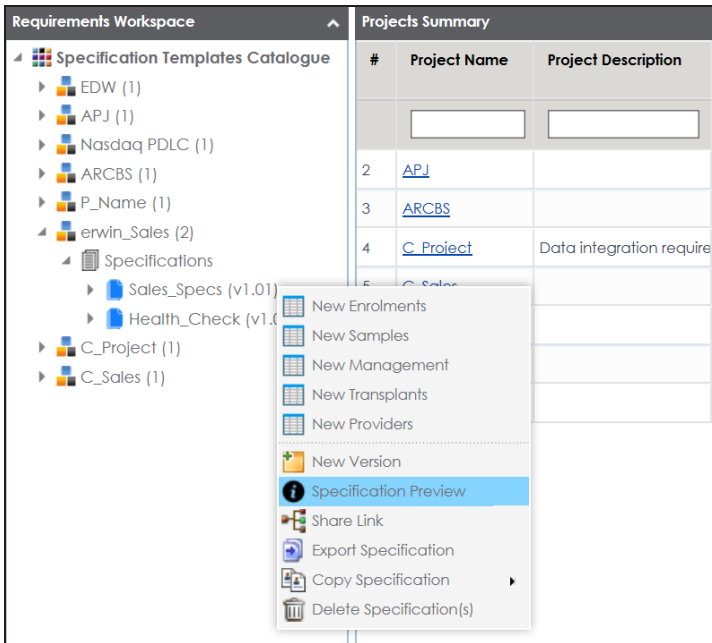
Managing Specifications

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.

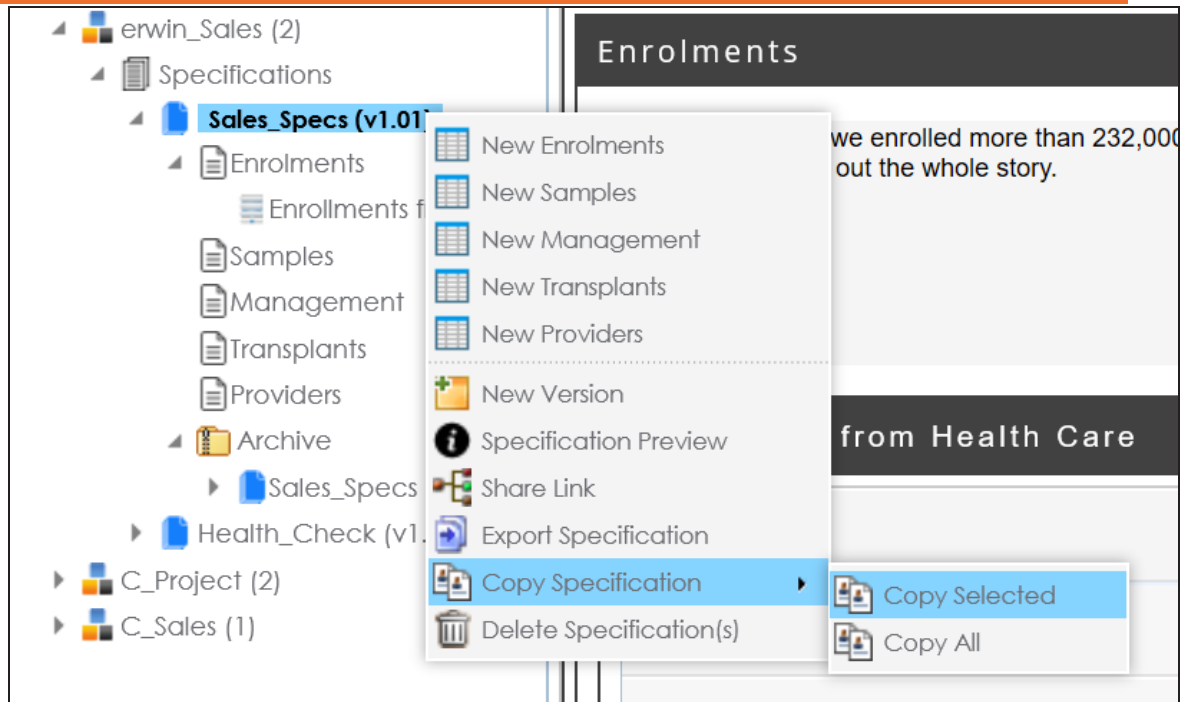
Export Specification

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.

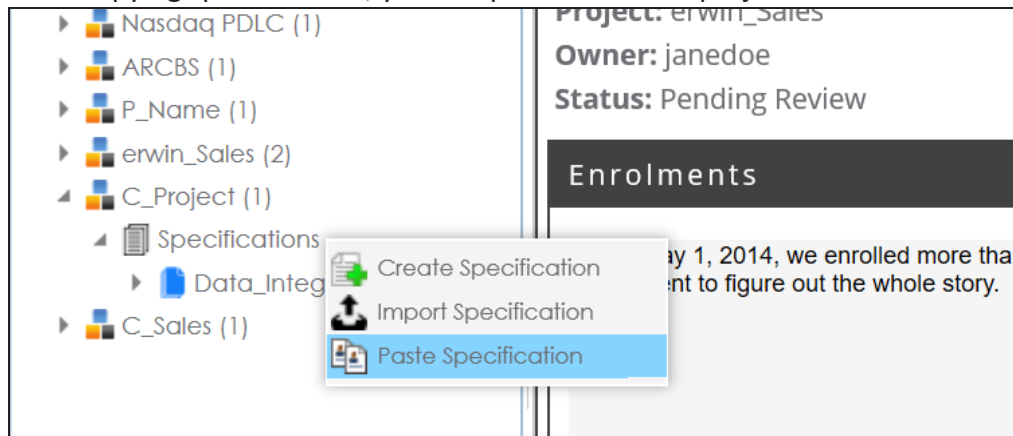
Managing Specifications



Use one of the following options:

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

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






Delete Specification

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.

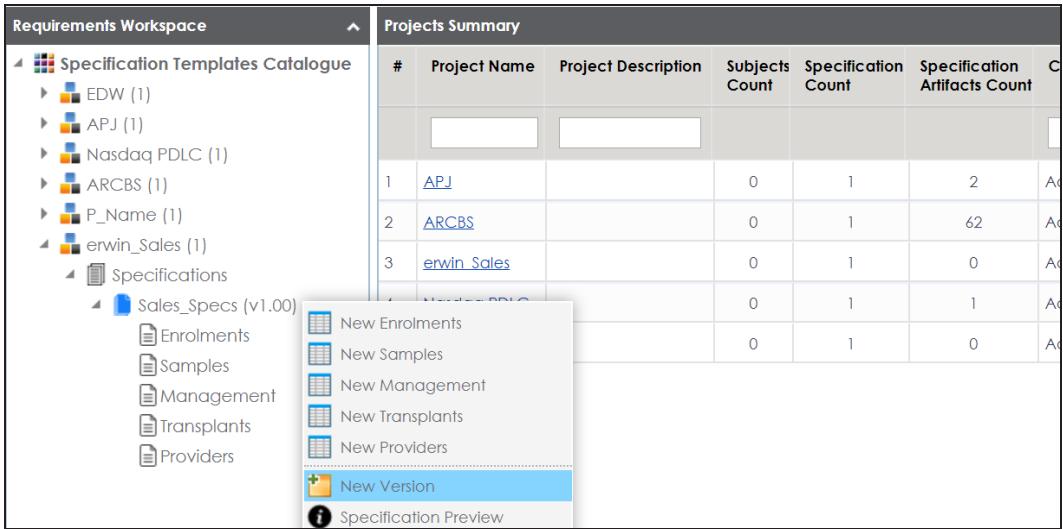
1. Click the **Specifications** node.
The specification Listing pager appears.
2. Click .
The Specification Details page appears in edit mode.
3. Update the required fields and click .
The specification is updated.

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.

Creating Specification Versions

The 'New Version' dialog box contains the following fields:

- Specification Name:** A text field containing 'Sales_Specs'.
- Specification Version:** A text field containing '1.01'.
- Version Label:** An empty text field.
- Change Description*:** A rich text editor with a toolbar (bold, italic, underline, list, etc.) and an empty text area.
- Mail Comments:** An empty text area.

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

Field Name	Description
Specification Name	Specifies the name of the specification. For example, OrganMatch.
Specification Version	Specifies the new version of the specification. For example, 1.02.
Version Label	Specifies the version label of the specification. For example, Beta. For more information on configuring version display of specifications, refer to the Configuring Version Display of Specifications topic.
Change Description	Specifies the description of the changes made in the specifications. For example: A new child artifact was added to the specification template.
Mail Com-	Specifies the mail comments which are sent to the project users.

Creating Specification Versions

Field Name	Description
ments	<p>For example: The new version of the specification contains one more child artifact.</p> <p>For more information on sending mail comments to project users, refer to the Configuring Email Settings topic.</p>

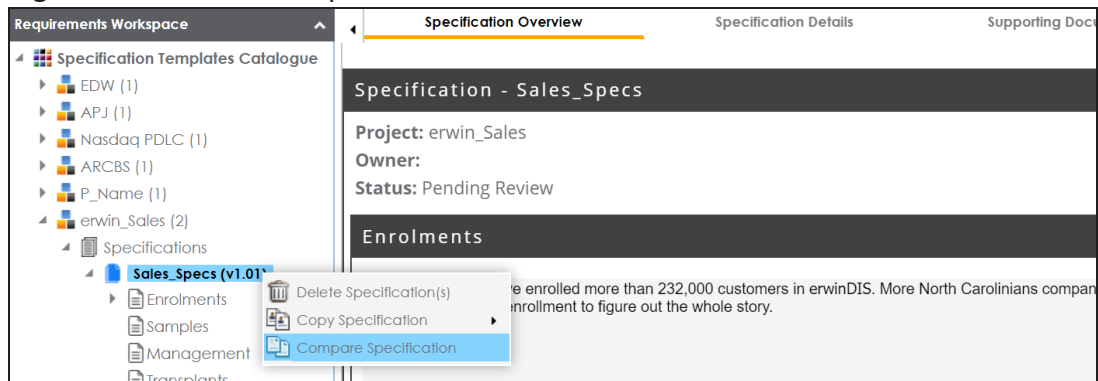
4. Click .

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

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

Color Representation

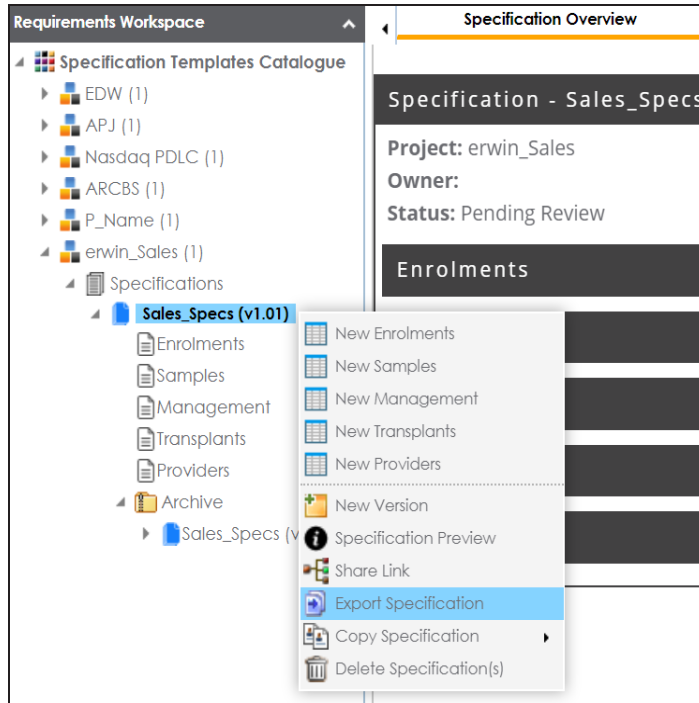
- - Changed Presentation
- - Unchanged Presentation

Exporting and Importing Specifications

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

To export specifications, follow these steps:

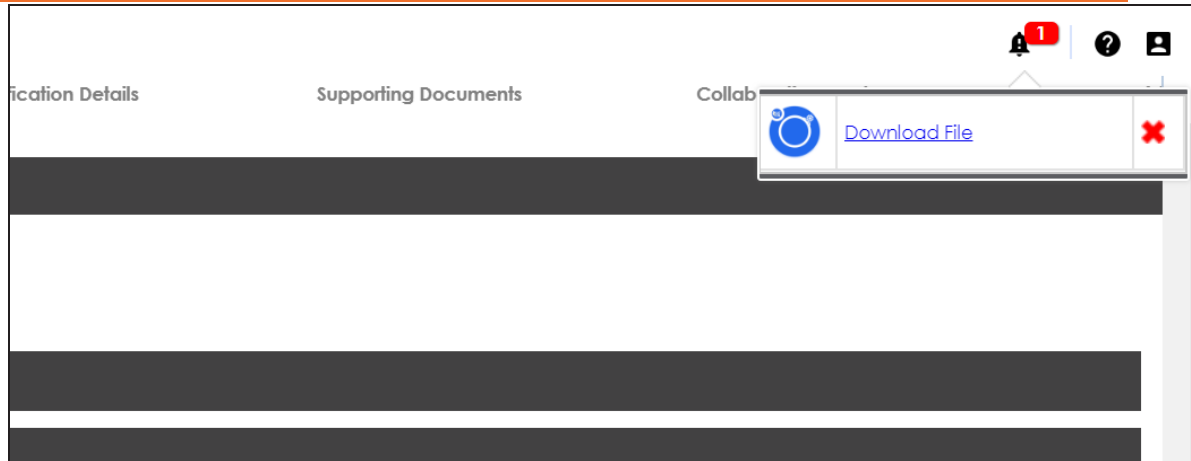
1. In the **Requirements Workspace** pane, right-click the required specification.



2. Click **Export Specification**.

The Download File hyperlink appears in the notification area.

Exporting and Importing Specifications



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.

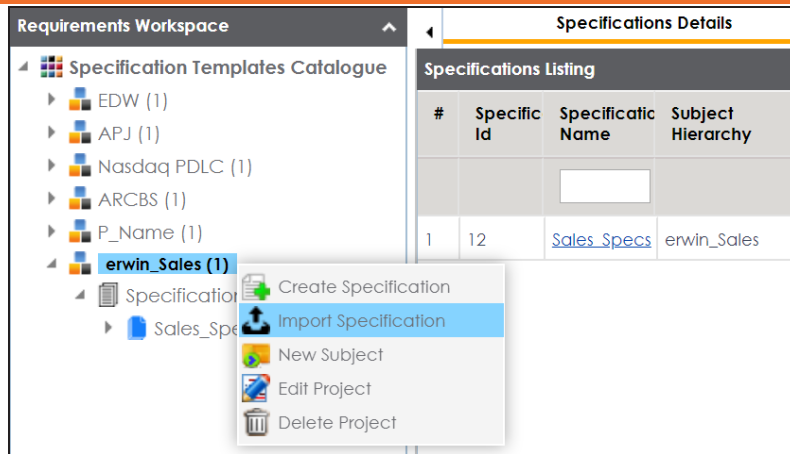
The unzipped folder contains the exported specification in the .xml format.




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.

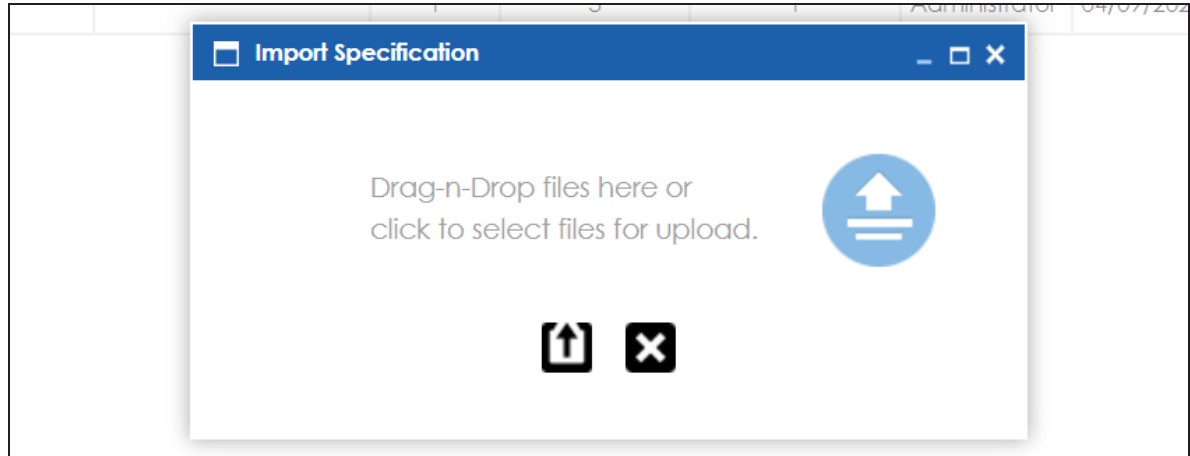
2. Go to **Application Menu > Data Catalog > Requirements Manager**.
3. In the **Requirements Manager** pane, right-click a project.

Exporting and Importing Specifications



4. Click **Import Specification**.

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



6. Click .

The specification is created and added to the Specifications tree.

Linking Requirements to Data Mappings

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

To link functional requirements to mappings, follow these steps:

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

The mapping opens in the detailed view.

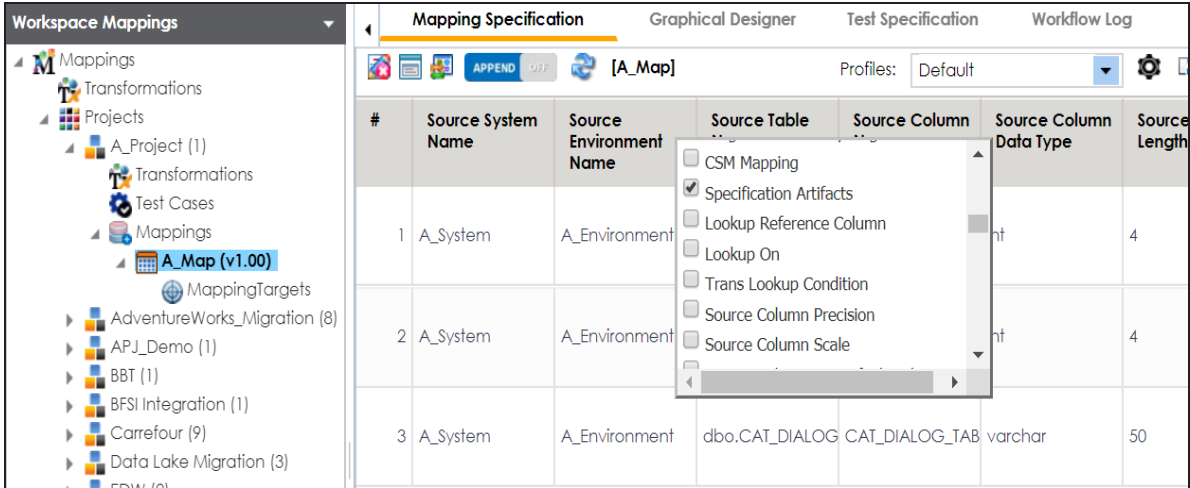
The screenshot displays the Mapping Manager interface. On the left is the 'Workspace Mappings' tree view, showing a hierarchy of projects and mappings, with 'A_Map (v1.00)' selected. The main area is the 'Mapping Specification' tab, which contains a table with the following columns: #, Source System Name, Source Environment Name, Source Table Name, Source Column Name, Source Column Data Type, Source Column Length, and Business Rule. The table lists six mappings, all from 'A_System' in 'A_Environment'. The right sidebar shows the 'Metadata Catalogue' with a search bar and a list of metadata items. At the bottom, there are tabs for 'Published Mappings', 'Additional Mapping Information', 'Code Mappings Catalogue', 'Specification Artifact Catalogue', and 'Reference Table Catalogue'.

#	Source System Name	Source Environment Name	Source Table Name	Source Column Name	Source Column Data Type	Source Column Length	Business Rule
1	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	int	4	
2	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_PRC	int	4	
3	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	50	
4	A_System	A_Environment	dbo.CAT_DIALOG	CAT_DIALOG_TAB	varchar	4000	
5	A_System	A_Environment	dbo.CAT_DIALOG	CREATED_BY	varchar	50	
6	A_System	A_Environment	dbo.CAT_DIALOG	CREATED_DATE_Ti	datetime	8	

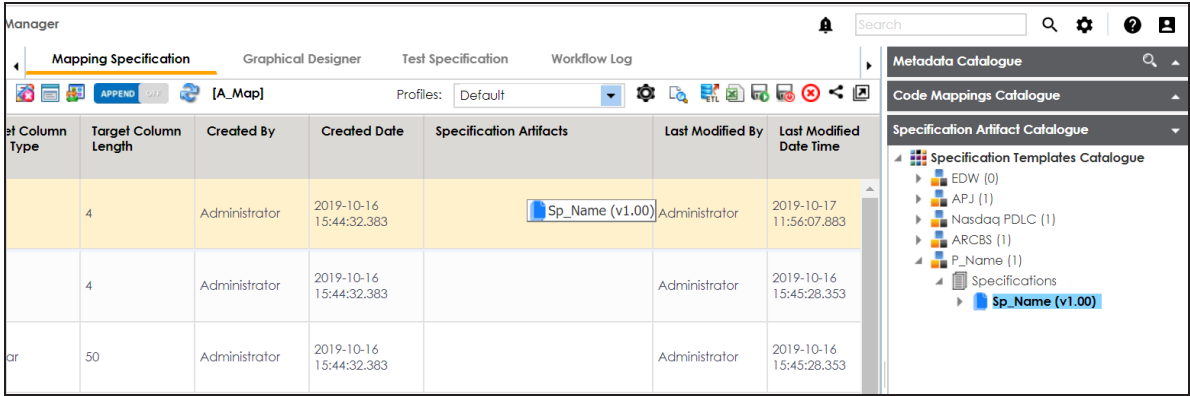
3. On the **Mapping Specification** tab, right click the grid header.


A list of header columns appears.

Linking Requirements to Data Mappings



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 Catalog**.
6. Expand the project that contains the required specification.
7. Drag and drop the specification on the **Specification Artifacts** column in the required row.



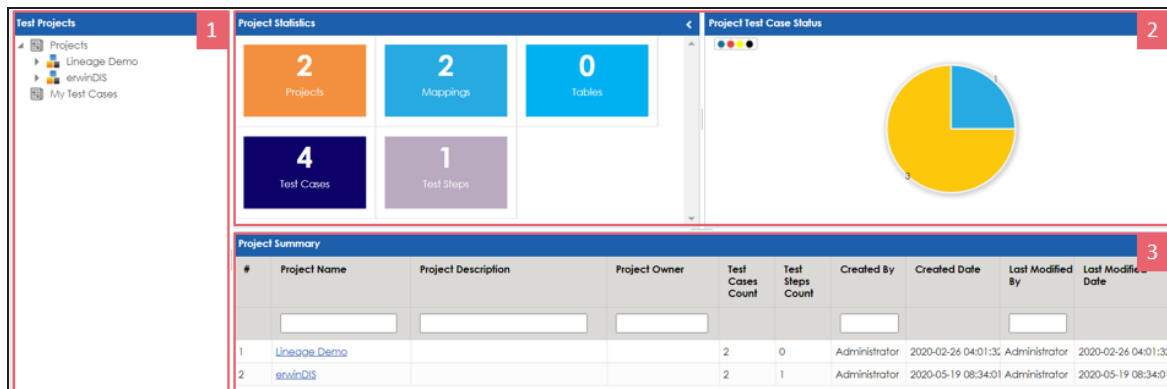
8. Click .
- Requirements are linked to the selected mapping.

Using Test Manager

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

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

The Test Manager dashboard appears:



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

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

Creating and Managing Test Cases

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

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

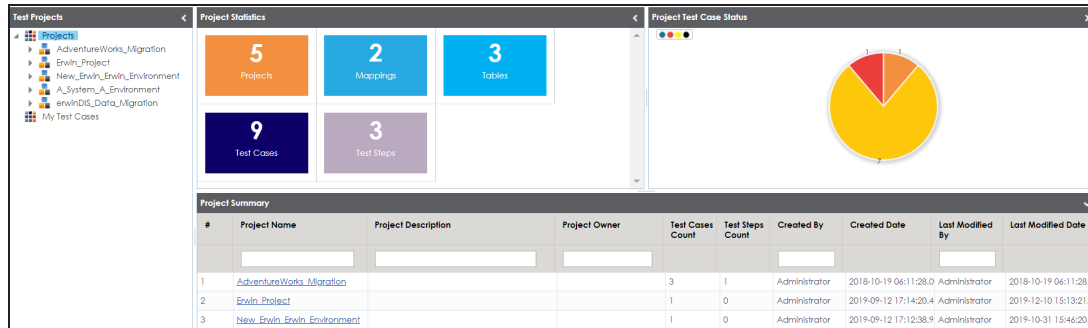
- [Creating and Managing Test Cases for Mappings](#)
- [Creating and Managing Test Cases for Tables](#)

Viewing and Analyzing Test Cases

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

To view and analyze test cases, follow these steps:

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



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

Project Statistics

Use this section to view the following information:

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

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

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

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

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

Project Test Case Status

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

Viewing and Analyzing Test Cases

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

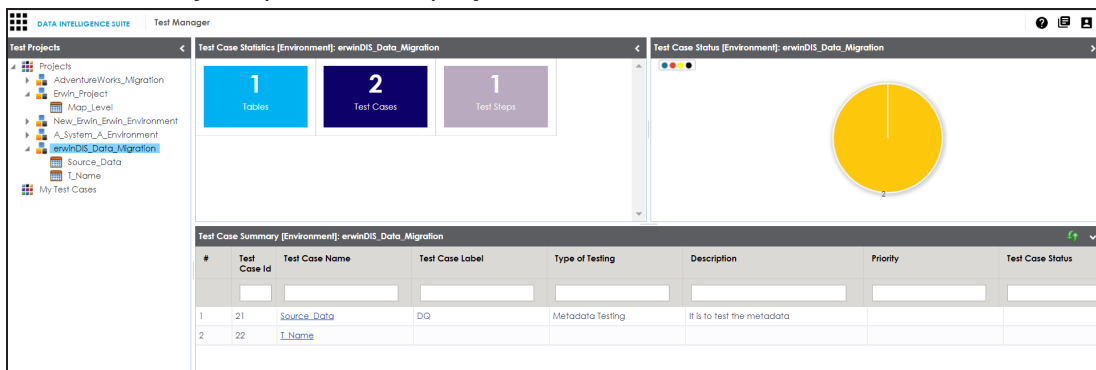
Project Summary

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

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

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

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



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.

The screenshot shows a web application interface for viewing test case details. On the left is a sidebar titled 'Test Projects' containing a tree view with nodes like 'AdventureWorks_Migration', 'Erwin_Project', 'Map_Level', 'New_Erwin_Erwin_Environment', 'A_System_A_Environment', 'erwinDIS_Data_Migration', 'Source_Data' (highlighted), 'T_Name', and 'My Test Cases'. The main area is titled 'Test Case Information: Source_Data' and has three tabs: 'Test Case Overview' (active), 'Validation Steps', and 'Document Upload'. The 'Test Case Overview' tab contains the following fields:

- Test Case Id: 21
- Test Case Name*: Source_Data
- Test Case Label: DQ
- Priority: (empty field)
- Type of Testing: Metadata Testing
- Extendable: ☐
- Test SQL Script: select*from ADS_ASSOCIATIONS
- Description: It is to test the metadata
- 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

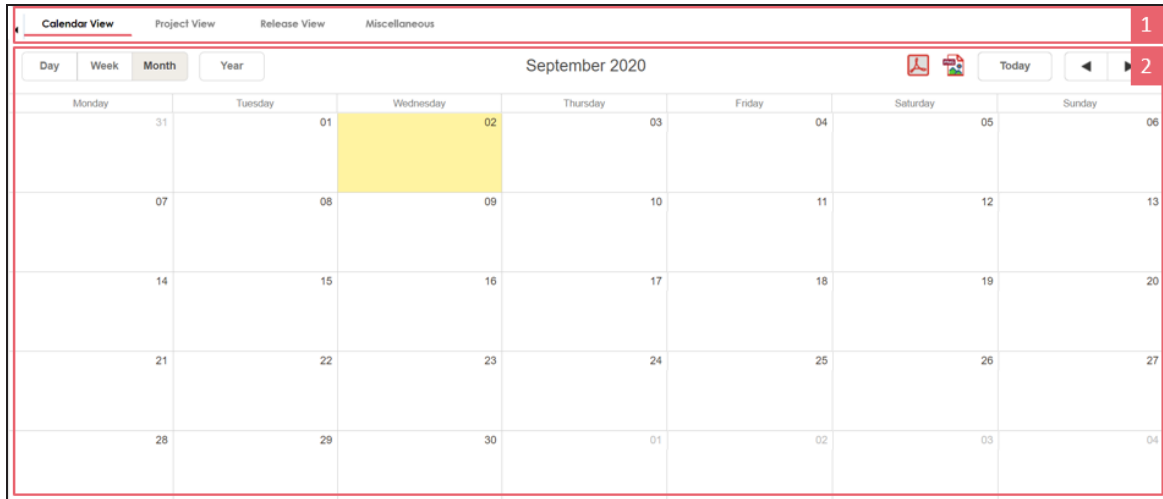
Use this tab to view the uploaded documents in the test case.

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

[illegible]

Using Release Manager

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



UI Section	Function
1-Browser Pane	<p>Use this pane to browse through releases and miscellaneous options.</p> <p>You can switch between different views to see releases:</p> <ul style="list-style-type: none"> ▪ 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 Pane	Use this pane to view or work on the data based on your selection in the browser pane.

Managing releases involve the following:

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

Creating Projects and Adding Releases

You can create projects and add releases to these projects.

To create projects, follow these steps:

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

The screenshot displays the Release Manager interface in Project View. The main area shows a table of projects and a detailed view of releases for the selected project 'EDW'. The right sidebar contains summary charts for the project's status and ownership.

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

#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Create Date	Last Modified Date	Options
1	March 31 2019 Hotfix	03/30/2019	ks123		PENDING APPROVAL	Administrator	03/13/2019		
2	Pfizer Test	01/31/2019	janedoe		PENDING APPROVAL	Administrator	01/23/2019		
3	Release_New	11/28/2019			PENDING APPROVAL	Administrator	11/28/2019		
4	Test	10/24/2018			PENDING APPROVAL	Administrator	10/24/2018		

Release Summary - By Status: 100% PENDING APPROVAL

Release Summary - By Owner: 50% ks123, 25% janedoe, 25% Unassigned

2. Click **Add Project**.

The New Project page appears.

Creating Projects and Adding Releases

The screenshot shows a 'New Project' dialog box with the following fields:

- Project Name:* (required)
- Project Description:
- Resource Name:* (required)
- Resource Description:
- Resource Cell Phone:
- Resource Work Phone:
- Resource Email:

Buttons: Save, Cancel

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

Field Name	Description
Project Name	Specifies the name of the project. For example, EDW.
Project Description	Specifies the description about the project. For example: List of releases targeted this spring.
Resource Name	Specifies the project owner's name. For example, Jane Doe.
Resource Description	Specifies the description about the project owner. For example: Jane Doe is the release manager of the organization.
Resource Cell Phone	Specifies the cell phone number of the project owner. For example, +658374414288.
Resource Work Phone	Specifies the work phone number of the project owner. For example, 1-800-783-7946.
Resource Email	Specifies the project owner's email address.

Creating Projects and Adding Releases

Field Name	Description
	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.

Calendar View Project View Release View Miscellaneous									
Project Listing :									
Add Project Export to Excel Share									
#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
1	EDW	Kartik Sridhar	11/28/2019	4	6	Administrator	10/18/2018		   
2	New_Project	Resource_Name	10/17/2019	2	1	Administrator	09/11/2019		   
3	Project_Name	Joe Villers	11/28/2019	0	0	Administrator	11/28/2019		   
Release Listing for : Project_Name									
Add Release Generate Release Plan Export to Excel									
#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Create Date	Last Modified Date	Options

2. Click **Add Release**.

The New Release page appears.


Creating Projects and Adding Releases

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

- Project Name* (dropdown menu showing 'Project_Name')
- Release Name* (text input)
- Release Description: (text input)
- Change Control Number (text input)
- Release Date* (calendar icon, showing '11/28/2019')
- Release Owner (dropdown menu showing '-Select-')
- User Defined Field 1 through 10 (text input fields)

Buttons: Save, Cancel

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

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

Creating Projects and Adding Releases

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 Defined Fields (1-10)	Specifies the UI label name of additional. You can define the UI labels in the Language Settings .

4. Click **Save**.

The release is added to the selected project.

5. Use the following options:

View (👁)

To view the release details, click 👁.

Edit (✎)

To edit, the release, click ✎.

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

Download (📄)

To download the release details, click 📄.

Delete (✕)

To delete the release, click ✕.

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

Adding Release Objects to Releases

You can add following release objects to releases:

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



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

Adding Data Item Mappings as Release Objects

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

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

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

The release listing of the project appears.

The screenshot shows a web application interface with a top navigation bar containing 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the navigation bar, there are three main sections: 'Project Listing', 'Release Listing for: Project_Name', and 'Project Details'.

Project Listing: A table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table contains three rows:

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

Release Listing for: Project_Name: A table with columns: #, Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. The table contains one row:

#	Release Name	Release Date	Release Owner	Change Control	Release Status	Created By	Create Date	Last Modified Date	Options
1	Release_Name	11/28/2019			PENDING APPROVAL	Administrator	11/28/2019		[Edit] [Download] [Delete] [Refresh]

Project Details: A sidebar on the right showing 'Project_Name' details, including Description, Resource Name (Joe Villers), and Resource Email. Below this are two circular progress charts: 'Release Summary - By Status' showing 100% PENDING APPROVAL, and 'Release Summary - By Owner' showing 100% Unassigned.

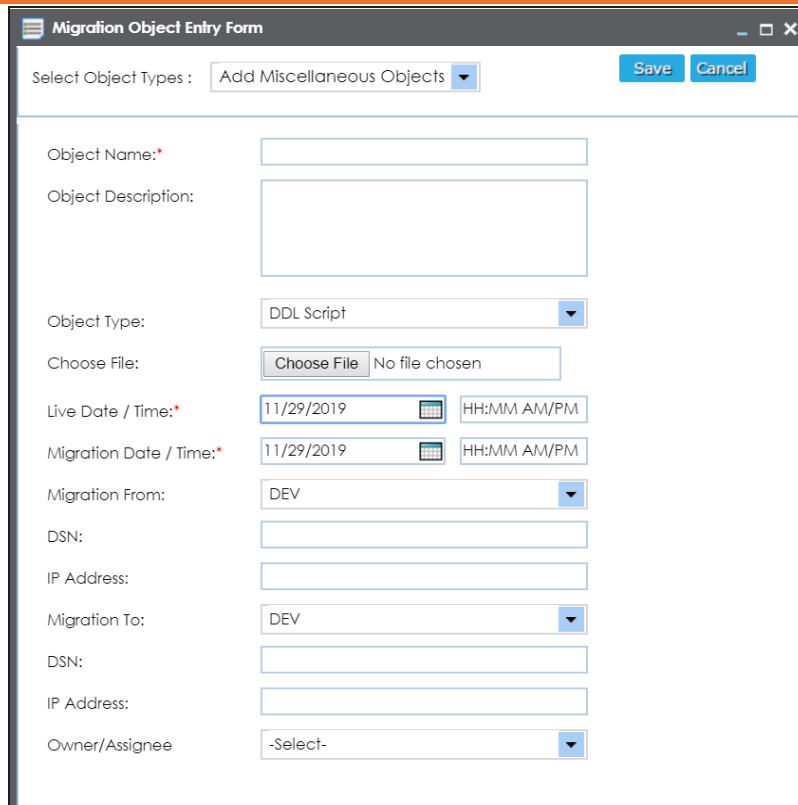
2. Click the required <Release_Name>.

The Release View page appears showing the release object details.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Adding Data Item Mappings as Release Objects



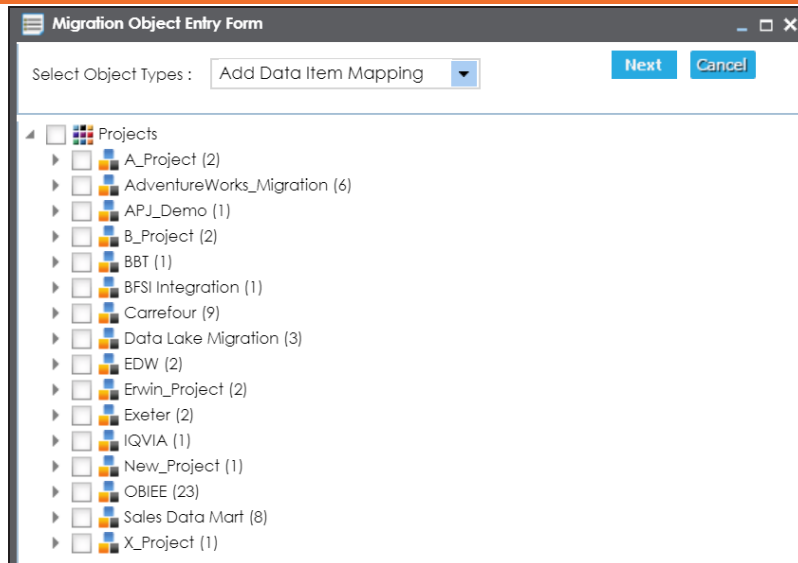
The screenshot shows a window titled "Migration Object Entry Form". At the top, there is a label "Select Object Types:" followed by a dropdown menu currently set to "Add Miscellaneous Objects". To the right of this are "Save" and "Cancel" buttons. The main area of the form contains several input fields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

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

4. In **Select Object Types**, select **Add Data Item Mapping**.

The following page appears.

Adding Data Item Mappings as Release Objects

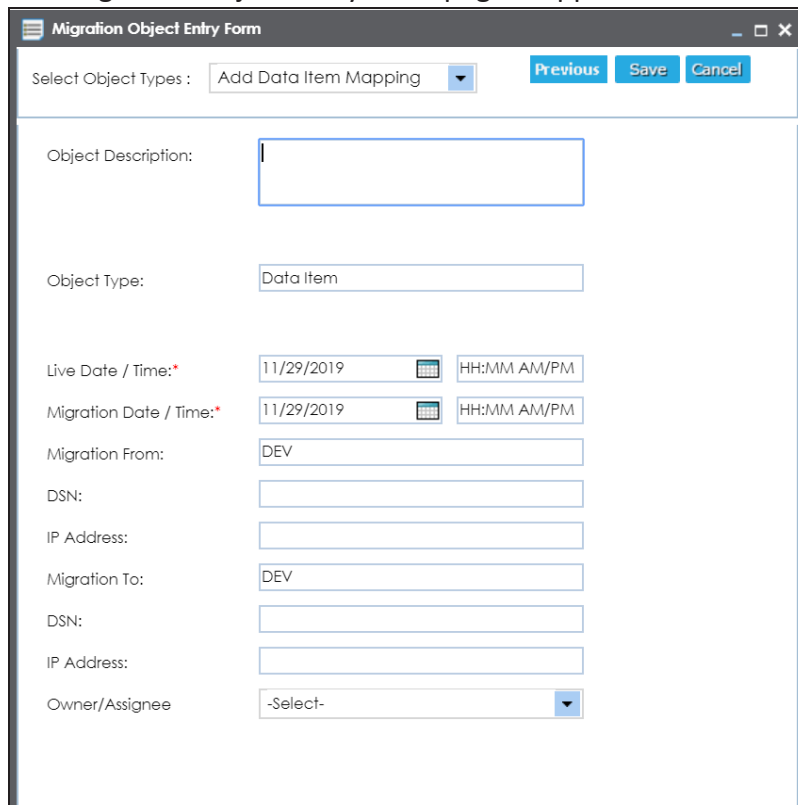


The Migration Object Entry Form is displayed with the 'Select Object Types' dropdown set to 'Add Data Item Mapping'. The 'Next' button is visible. Below the dropdown is a tree view of projects:

- Projects
 - A_Project (2)
 - AdventureWorks_Migration (6)
 - APJ_Demo (1)
 - B_Project (2)
 - BBT (1)
 - BFSI Integration (1)
 - Carrefour (9)
 - Data Lake Migration (3)
 - EDW (2)
 - Erwin_Project (2)
 - Exeter (2)
 - IQVIA (1)
 - New_Project (1)
 - OBIEE (23)
 - Sales Data Mart (8)
 - X_Project (1)

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

The Migration Object Entry Form page reappears.




The Migration Object Entry Form is displayed with the 'Select Object Types' dropdown set to 'Add Data Item Mapping'. The 'Previous', 'Save', and 'Cancel' buttons are visible. Below the dropdown are input fields for:

- Object Description:
- Object Type:
- Live Date / Time:
- Migration Date / Time:
- Migration From:
- DSN:
- IP Address:
- Migration To:
- DSN:
- IP Address:
- Owner/Assignee:

Adding Data Item Mappings as Release Objects

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

Field Name	Description
Object Description	Specifies the description about the release object being added to the release. For example: The release object is a data item mapping under the Dat- awarehouse project.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.
Migration Date / Time	Specifies the migration date and time of the release object from the DEV release environment. 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. This field is set to DEV by default.
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	This field is set to DEV by default. You can use the Promote Map option to migrate the selected data item mappings to the required release enviro- nment for the first time.
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

Adding Data Item Mappings as Release Objects

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

7. Click **Save**.

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

The screenshot shows the 'Release View' interface. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View' (selected), and 'Miscellaneous'. Below the tabs, there are filters for 'Select Project' and 'Select Release'. The main area displays 'Release Summary - By Status', 'Release Summary - By Owner', and 'Release Summary - By Type'. Below these summaries, there is a 'Release Object Details' section with a table of objects.

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

8. Use the following options:

Edit (✎)

To edit the release object, click ✎.

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



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

Information (i)


To view the mapping information, click i.

Download (↓)

To download the release object details, click ↓.

Email (✉)

Adding Data Item Mappings as Release Objects

To send email notification about the release object click .

Delete (✕)

To delete the release object, click ✕.

Promoting Data Item Mappings

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

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

To promote data item mappings, follow these steps:

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

The release listing of the project appears.

The screenshot shows the 'Project View' tab in the Release Manager. The 'Project Listing' table has columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table lists three projects: EDW, New_Project, and Project_Name. The 'Project_Name' project is selected, and its details are shown on the right. The details include: Project Name, Description, Resource Name (Joe Villers), Resource Email, and Release Summary - By Status (100% PENDING APPROVAL) and Release Summary - By Owner (100% Unassigned).

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

2. Click the required <Release_Name>.

The Release View tab appears.

The screenshot shows the 'Release View' tab in the Release Manager. The 'Release View' section shows the release details for 'Release_Name', including a calendar view for Nov 2019, a description, change control #, release owner, and a status of 'PENDING APPROVAL'. The 'Release Summary - By Status' shows 100% PENDING APPROVAL-1. The 'Release Summary - By Owner' shows 100% Unassigned - 1. The 'Release Summary - By Type' shows 100% Data Item - 1. The 'Release Object Details' table has columns: #, Object Name, Object Status, Type, Version, Date/Time, Migration Details, Owner, Created By, Create Date, and Options. The table lists one object: Erwin_Map, with a status of 'PENDING APPROVAL', type 'Data Item', version '1.05', and migration details.

#	Object Name	Object Status	Type	Version	Date/Time	Migration Details	Owner	Created By	Create Date	Options
1	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM, DEV	DEV	Administrator	11/29/2019	

Promoting Data Item Mappings


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.

The screenshot shows the 'Promote Data Item Mappings' interface. On the left, the 'Data Item Repository' pane shows a tree structure with 'Data Mapping Objects' and 'Erwin_Map'. The main area is 'Promotion Details', which contains the following fields and controls:

- Promote To:** A dropdown menu currently showing 'TEST'.
- Effective Date:** A date selection field with a calendar icon.
- Version Label:** A text input field.
- Publish Notes*:** A text area with rich text formatting options (Bold, Italic, Underline, and a checkmark icon).
- Change Description*:** Another text area with the same rich text formatting options.
- Publish To Project:** A dropdown menu showing '-select-'.
- Publish To Subject:** A dropdown menu showing '-select-'.
- Validate:** A red button at the top right of the 'Promotion Details' section.

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

Field Name	Description
Promote To	<p>Specifies the release environment to which the release object is being promoted.</p> <p>For example, TEST.</p> <p>Select the release environment where you wish to promote the release object (data item mapping).</p>
Effective Date	<p>Specifies the effective migration date of the release object.</p> <p>For example, 04/22/2020.</p> <p>Use  to enter the effective migration date.</p>
Version Label	<p>Specifies the version label of the release objects.</p> <p>For example, Beta.</p>

Promoting Data Item Mappings

Field Name	Description
Publish Notes	Specifies the notes about the publishing of the data item mapping. For example: The data item mappings should be promoted to the Adventureworks_Migration.
Change Description	Specifies the description about the changes in the data item mapping. For example: The business rule in the data item mappings was changed to ABORT.
Publish To Project	Specifies the project in the Mapping Manager to which the data item mapping is being promoted. For example, Adventureworks_Migration.
Publish To Subject	Specifies the Subject Area in the Mapping Manager to which the data item mapping is being promoted. For example, Providers.

6. Click **Validate**.

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

Promote Data Item Mappings

Data Item Repository

- Data Mapping Objects
- Erwin_Map

Promotion Details

Promote To: TEST Effective Date: 11/29/2019

Version Label:

Publish Notes*

The data item mappings can be promoted to Test environment.

Change Description*

The mappings will be moved to corresponding test environment.

Promotion Error Report

SNo	Failed Environments	System Environments
1	erwinDIS.erwinDIS	select any environment
2	New_Erwin_Erwin_Environment	select any environment

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

Promoting Data Item Mappings

Data Item Repository

Data Mapping Objects

Erwin_Map

Promotion Details

Validate

Promote ToTESTEffective Date11/29/2019

Version Label

Publish Notes*

B I U

The data item mappings can be promoted to Test environment.

Change Description*

B I U

The mappings will be moved to corresponding test environment.

Promotion Error Report

Save

SNo	Failed Environments	System Environments
1	erwinDIS.erwinDIS	erwinDIS.Data_Migration
2	New_Erwin.Erwin_Environment	T_New.T_New A_System_A_Environment B_System_B_Environment erwinDIS.erwinDIS1 New_Erwin.Erwin_Environment1 erwinDIS.Data_Migration

8. Click **Save**.

The promote system environments are assigned.

Data Mapping Objects

Erwin_Map

Validate

Promote ToTESTEffective Date11/29/2019

Version Label

Publish Notes*

B I U

The data item mappings can be promoted to Test environment.

Change Description*

B I U

The mappings will be moved to corresponding test environment.

Success Message

Promote Environments Successfully Assigned

9. Click **Validate**.

The promotion is successfully validated.

Life Cycle Management Guide | 69

Promoting Data Item Mappings

Data Mapping Objects

- Erwin_Map

Promote To: TEST Effective Date: 11/29/2019

Version Label:

Publish Notes*

B I U The data item mappings can be promoted to Test environment.

Change Description*

B I U The mappings will be moved to corresponding test environment.

Successfully Validated

10. Click **Promote**.

The object is promoted to the selected project.



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

Adding Codeset as Release Objects

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

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

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

The release listing of the required project appears.

The screenshot displays the 'Project View' tab in a software interface. It features a 'Project Listing' table with columns for Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table lists three projects: EDW, New_Project, and Project_Name. Below the table, there is a 'Release Listing for: Project_Name' section with a table showing release details, including Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. The release status is 'PENDING APPROVAL'. To the right of the tables, there is a 'Project Details' panel showing the Project Name, Description, Resource Name (Joe Villers), and Resource Email. Below this, there are two circular progress indicators: 'Release Summary - By Status' showing 100% PENDING APPROVAL, and 'Release Summary - By Owner' showing 100% Unassigned.

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

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

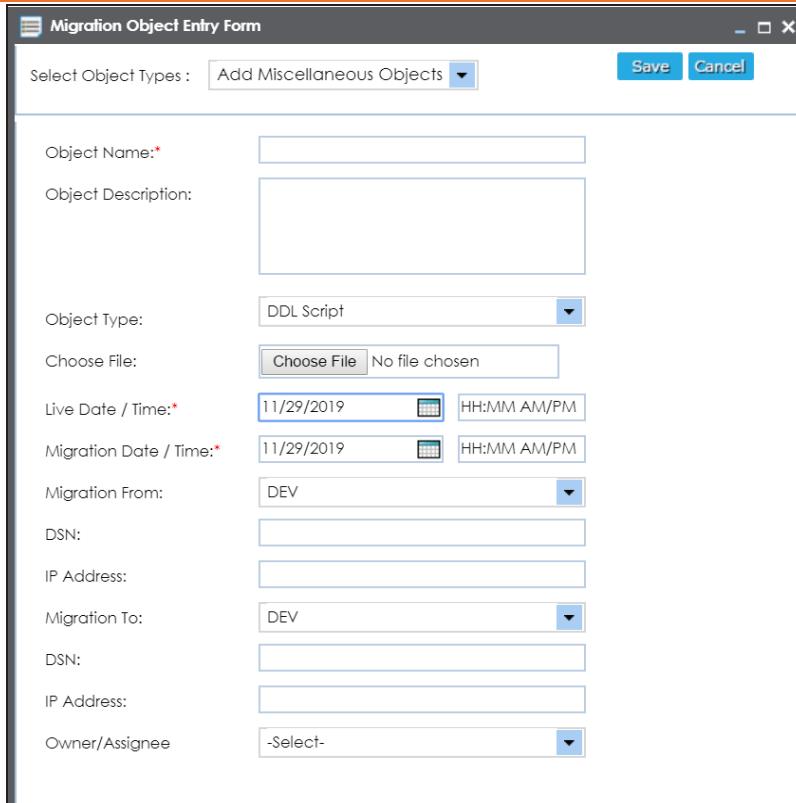
2. Click the required <Release_Name>.

The Release View page appears.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Adding Codeset as Release Objects

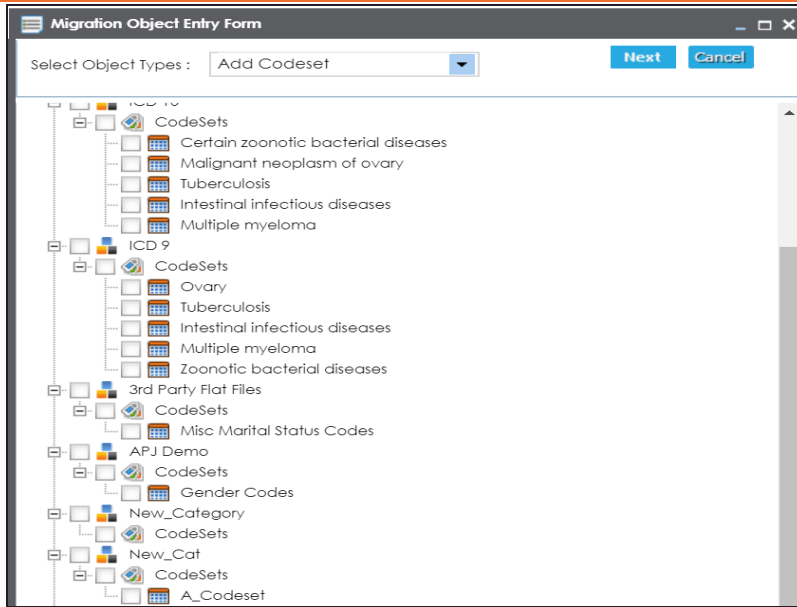


The screenshot shows a web application window titled "Migration Object Entry Form". At the top, there is a "Select Object Types:" label followed by a dropdown menu currently set to "Add Miscellaneous Objects". To the right of this are "Save" and "Cancel" buttons. The main form area contains several fields: "Object Name:" with a text input; "Object Description:" with a larger text area; "Object Type:" with a dropdown menu set to "DDL Script"; "Choose File:" with a "Choose File" button and the text "No file chosen"; "Live Date / Time:" with a date input set to "11/29/2019" and a time input set to "HH:MM AM/PM"; "Migration Date / Time:" with a date input set to "11/29/2019" and a time input set to "HH:MM AM/PM"; "Migration From:" with a dropdown menu set to "DEV"; "DSN:" with a text input; "IP Address:" with a text input; "Migration To:" with a dropdown menu set to "DEV"; "DSN:" with a text input; "IP Address:" with a text input; and "Owner/Assignee:" with a dropdown menu set to "-Select-".

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

The following page appears.

Adding Codeset as Release Objects




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

The Migration Object Entry Form page reappears.

The screenshot shows the 'Migration Object Entry Form' window after clicking 'Next'. The 'Select Object Types' dropdown is still set to 'Add Codeset'. To the right of this menu are 'Previous', 'Save', and 'Cancel' buttons. Below the menu, the form contains several input fields: 'Object Description' (a text box), 'Object Type' (a dropdown menu set to 'Code Set'), 'Live Date / Time' (a date and time picker), 'Migration Date / Time' (a date and time picker), 'Migration From' (a dropdown menu set to 'DEV'), 'DSN' (a text box), 'IP Address' (a text box), 'Migration To' (a dropdown menu set to 'DEV'), 'DSN' (a text box), 'IP Address' (a text box), and 'Owner/Assignee' (a dropdown menu set to '-Select-').

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

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

Adding Codeset as Release Objects

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

7. Click **Save**.

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



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

The screenshot shows the Release Manager interface. The 'Release View' tab is active. The sidebar on the left shows a calendar for November 2019, with the 29th highlighted. The main area displays three release summaries: 'Release Summary - By Status' (showing 4 PENDING APPROVAL), 'Release Summary - By Owner' (showing 4 Unassigned), and 'Release Summary - By Type' (showing 1 Data Item, 2 Data Item, and 1 DDL Script). Below these summaries is a table of release objects.

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

8. Use the following options:

Edit (✎)

To edit, the release object, click ✎.

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

Information (i)


To view the mapping information, click i.

Download (↓)

To download the release object details, click ↓.

Email (✉)

Adding Codeset as Release Objects

To send email notification about the release object click .

Delete (✕)

To delete the release object, click ✕.

Adding Code Mappings as Release Objects

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

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

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

The release listing of the required project appears.

The screenshot displays the 'Project View' tab in a software interface. The main area shows a 'Project Listing' table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table lists three projects: 'EDW', 'New_Project', and 'Project_Name'. The 'Project_Name' row is highlighted. Below the table, there is a section titled 'Release Listing for : Project_Name' with a table showing release details. The 'Release Name' column is highlighted. To the right, a 'Project Details' sidebar shows information for 'Project_Name', including a description, resource name (Joe Villers), and resource email. Below this, there are two circular progress indicators: 'Release Summary - By Status' showing 'PENDING APPROVAL' at 100%, and 'Release Summary - By Owner' showing 'Unassigned' at 100%.

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

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

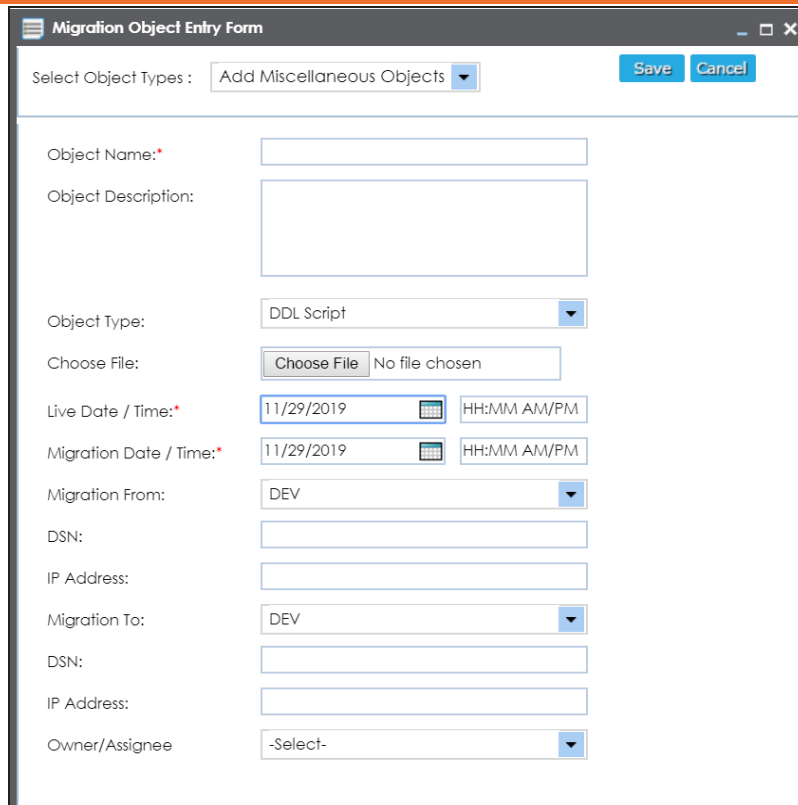
2. Click the required <Release_Name>.

The Release View page appears showing the release object details.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Adding Code Mappings as Release Objects

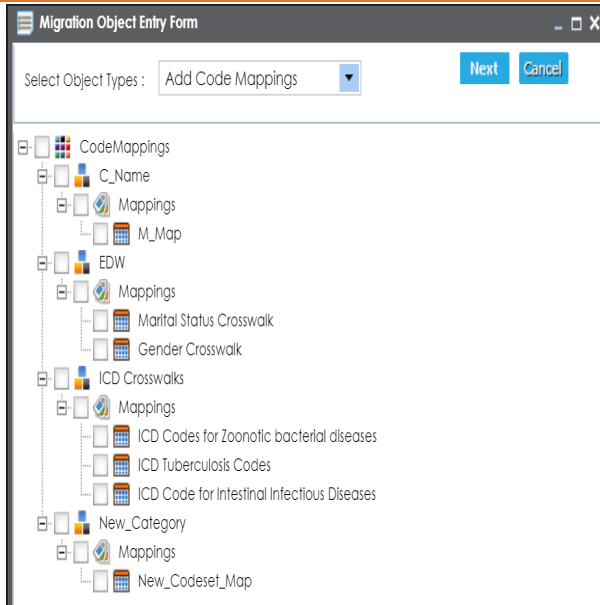


The screenshot shows a window titled "Migration Object Entry Form". At the top, there is a label "Select Object Types:" followed by a dropdown menu currently showing "Add Miscellaneous Objects". To the right of this are "Save" and "Cancel" buttons. Below this header, the form contains several fields: "Object Name:" with a text input; "Object Description:" with a larger text area; "Object Type:" with a dropdown menu showing "DDL Script"; "Choose File:" with a "Choose File" button and the text "No file chosen"; "Live Date / Time:" with a date field showing "11/29/2019" and a time field showing "HH:MM AM/PM"; "Migration Date / Time:" with a date field showing "11/29/2019" and a time field showing "HH:MM AM/PM"; "Migration From:" with a dropdown menu showing "DEV"; "DSN:" with a text input; "IP Address:" with a text input; "Migration To:" with a dropdown menu showing "DEV"; "DSN:" with a text input; "IP Address:" with a text input; and "Owner/Assignee" with a dropdown menu showing "-Select-".

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

The following page appears.

Adding Code Mappings as Release Objects




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

The Migration Object Entry Form page reappears.

The screenshot shows the 'Migration Object Entry Form' window after clicking 'Next'. The 'Select Object Types' dropdown is still set to 'Add Code Mappings'. The 'Object Description' field is empty. The 'Object Type' dropdown is set to 'Code Map'. The 'Live Date / Time' field is set to '11/29/2019' with a calendar icon and a time field set to 'HH:MM AM/PM'. The 'Migration Date / Time' field is also set to '11/29/2019' with a calendar icon and a time field set to 'HH:MM AM/PM'. The 'Migration From' dropdown is set to 'DEV'. The 'DSN' and 'IP Address' fields are empty. The 'Migration To' dropdown is set to 'DEV'. The 'DSN' and 'IP Address' fields are empty. The 'Owner/Assignee' dropdown is set to '-Select-'.

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

Adding Code Mappings as Release Objects

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

Adding Code Mappings as Release Objects

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

7. Click **Save**.

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

The screenshot shows the 'Release View' interface. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View' (selected), and 'Miscellaneous'. Below the tabs, there are dropdowns for 'Select Project*' and 'Select Release*', and buttons for 'Add Release', 'Edit Release', 'Generate Release Plan', 'Activity Log', 'Delete Release', and 'Share'. The main area displays 'Release Summary - By Status' (a pie chart showing 'PENDING APPROVAL' at 5%), 'Release Summary - By Owner' (a pie chart showing 'Unassigned' at 5%), and 'Release Summary - By Type' (a pie chart showing 'Code Map - 1', 'Code Set - 1', 'DDL Script - 1', and 'Item - 2'). Below these summaries is the 'Release Object Details' section, which includes a table of release objects.

#	Object Name	Object Status	Type	Version	Date/Time	Migration Details	Owner	Created By	Create Date	Options	
					Live Date	Migration Date	From	To			
1	K_New_Mapping	PENDING APPROVAL	Data Item	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	Production	PROD	Administrator	11/29/2019	[Edit] [Info] [Download] [Email] [Delete] [Share]
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST	Administrator	11/29/2019	[Edit] [Info] [Download] [Email] [Delete] [Share]
3	Sales_Codese	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV	Administrator	12/02/2019	[Edit] [Info] [Download] [Email] [Delete] [Share]
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV	Administrator	12/02/2019	[Edit] [Info] [Download] [Email] [Delete] [Share]
5	New_CodeseMap	PENDING APPROVAL	Code Map	1.01	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST	Administrator	12/02/2019	[Edit] [Info] [Download] [Email] [Delete] [Share]

8. Use the following options:

Edit (✎)

To edit the release object, click ✎.

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

Information (i)

To view the mapping information, click i.

Download (↓)

To download the release object details, click ↓.

Email (✉)

To send email notification about the release object click ✉.

Delete (✕)

To delete the release object, click ✕.

Adding Miscellaneous Objects

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

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

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

The release listing of the required project appears.

The screenshot displays the Release Manager interface. The top navigation bar includes 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. The main content area is divided into two sections. The top section, 'Project Listing', contains a table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The third project, 'Project_Name', is highlighted. Below this, the 'Release Listing for: Project_Name' section shows a table with columns: #, Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. The first release, 'Release_Name', is listed with a status of 'PENDING APPROVAL'. On the right side, the 'Project Details' panel shows the project name, description, resource name (Joe Villers), and resource email. Below this, two circular progress charts are shown: 'Release Summary - By Status' with a red circle and 'PENDING APPROVAL' label, and 'Release Summary - By Owner' with a red circle and 'Unassigned' label.

2. Click the required <Release_Name>.

The Release View page appears.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Adding Miscellaneous Objects

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

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

Adding Miscellaneous Objects

Field Name	Description
	Click Browse to select the file.
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 / 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

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.

The screenshot shows the 'Release View' interface. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View' (selected), and 'Miscellaneous'. Below the tabs, there are dropdowns for 'Select Project*' and 'Select Release*', and buttons for 'Add Release', 'Edit Release', 'Generate Release Plan', 'Activity Log', 'Delete Release', and 'Share'. The main area displays 'Release Summary - By Status', 'Release Summary - By Owner', and 'Release Summary - By Type'. Below these, there is a 'Release Object Details' section with filters for 'Select Status', 'Select User', and 'Select Type'. A table lists the release objects:

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

7. Use the following options:

Edit (✎)

To edit the release object, click ✎.

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

Information (i)

To view the mapping information, click i.

Download (↓)

To download the release object details, click ↓.

Email (✉)

To send email notification about the release object click ✉.

Delete (✕)

To delete the release object, click ✕.

Moving Release Objects

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



You cannot move a data item mapping object.

To move release objects, follow these steps:

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

The release listing of the required project appears.

The screenshot shows the 'Project View' tab with a list of projects. The selected project is 'Project_Name'. The 'Release Listing' table shows the following data:

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

The 'Release Listing for: Project_Name' table shows the following data:

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

The 'Project Details' panel shows the following information:

- Project_Name**
- Description:
- Resource Name: Joe Villers
- Resource Email:

The 'Release Summary - By Status' pie chart shows 100% PENDING APPROVAL.

The 'Release Summary - By Owner' pie chart shows 100% Unassigned.

2. Click the required <Release Name>.

The Release View page appears showing the release object details.

The screenshot shows the 'Release View' tab with the 'Release_Name' selected. The 'Release Summary - By Status' pie chart shows 100% PENDING APPROVAL. The 'Release Summary - By Owner' pie chart shows 100% Unassigned. The 'Release Summary - By Type' pie chart shows the following distribution:

Type	Percentage
Code Map - 1	20%
Code Set - 1	20%
Item - 2	20%
SQL Script - 1	40%

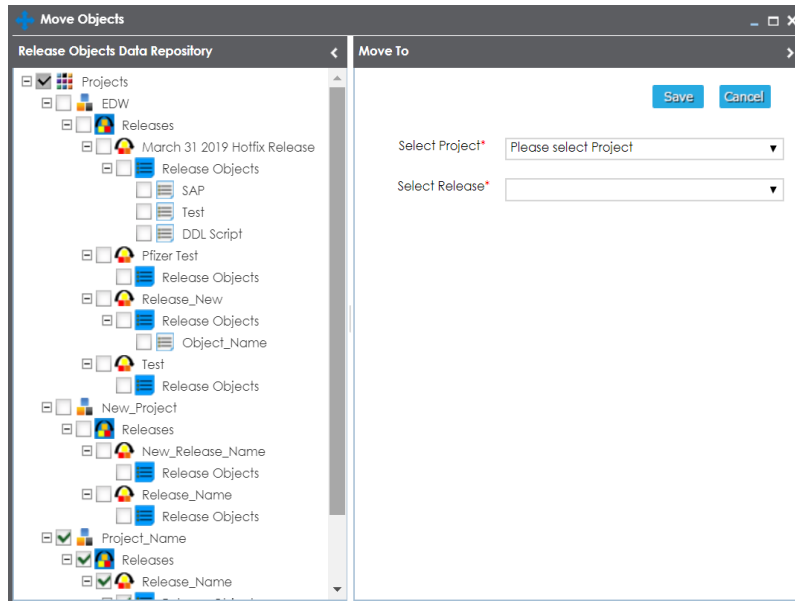
The 'Release Object Details' table shows the following data:

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

Moving Release Objects

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.

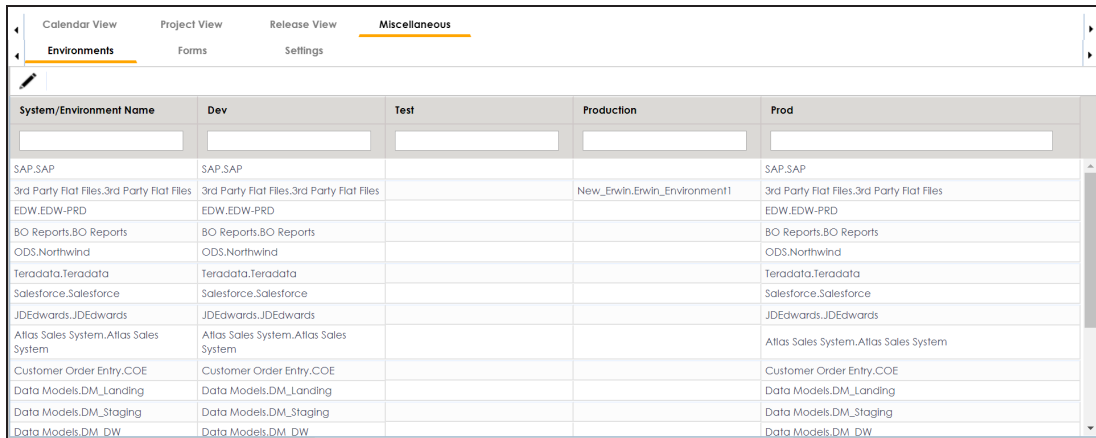
Sorting Projects and Releases

You can sort project listing in the Project View by:

- Project Name
- Owner
- Created Date
- Last Modified Date

To sort projects, follow these steps:

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




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

- Click **Settings**.

The following page appears.

Sorting Projects and Releases

The screenshot shows the 'Miscellaneous' settings page. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. Below these are sub-tabs for 'Environments', 'Forms', and 'Settings'. The 'Settings' sub-tab is selected. On the left, there is a pencil icon. Below it, the 'Project Sorting By' section has a list of options: 'Project Name' (selected), 'Owner', 'Created Date', and 'Last Modified Date'. Below this list is a 'Sorting On' section with 'Asc' (selected) and 'Desc' options. On the right, the 'Release Sorting By' section has a list of options: 'Release Name' (selected), 'Owner', 'Release Status', 'Release Date', 'Created Date', and 'Last Modified Date'. Below this list is a 'Sorting On' section with 'Asc' (selected) and 'Desc' options.

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**.

Sorting Projects and Releases

The screenshot shows a web application interface with a top navigation bar containing 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. Below this is a sub-navigation bar with 'Environments', 'Forms', and 'Settings'. The 'Settings' tab is active. On the left, there is a pencil icon. The main content area is divided into two columns. The left column is titled 'Project Sorting By' and contains four radio button options: 'Project Name' (selected), 'Owner', 'Created Date', and 'Last Modified Date'. Below these is a 'Sorting On' section with two radio button options: 'Asc' (selected) and 'Desc'. The right column is titled 'Release Sorting By' and contains six radio button options: 'Release Name' (selected), 'Owner', 'Release Status', 'Release Date', 'Created Date', and 'Last Modified Date'. Below these is a 'Sorting On' section with two radio button options: 'Asc' (selected) and '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.