



erwin Data Intelligence

Life Cycle Management Guide

Release v13.2

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Managing Life Cycles

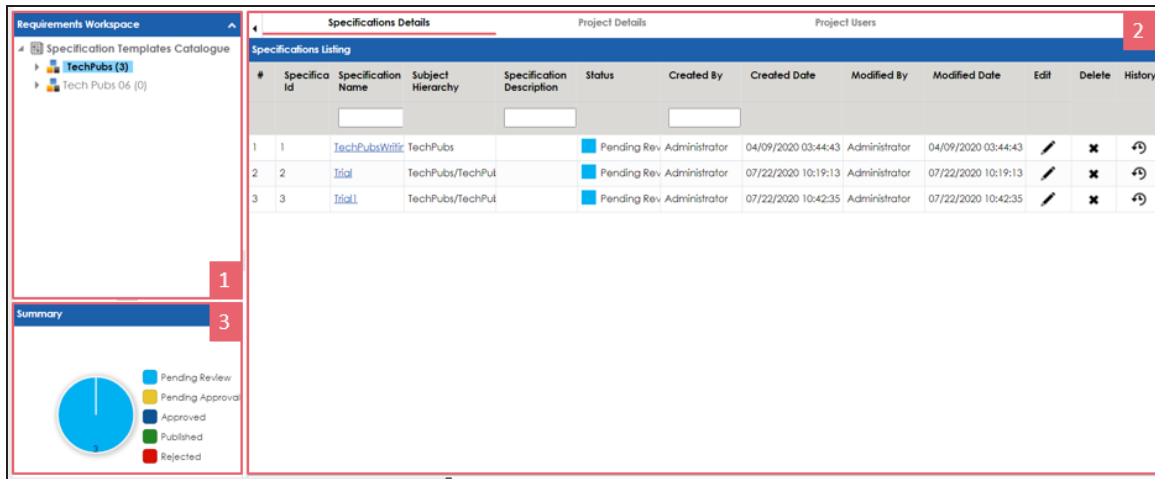
This section walks you through life cycle management in a data integration project. It involves requirements, release, and test management.

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

Using Requirements Manager

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

The Requirements Manager dashboard appears:



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:

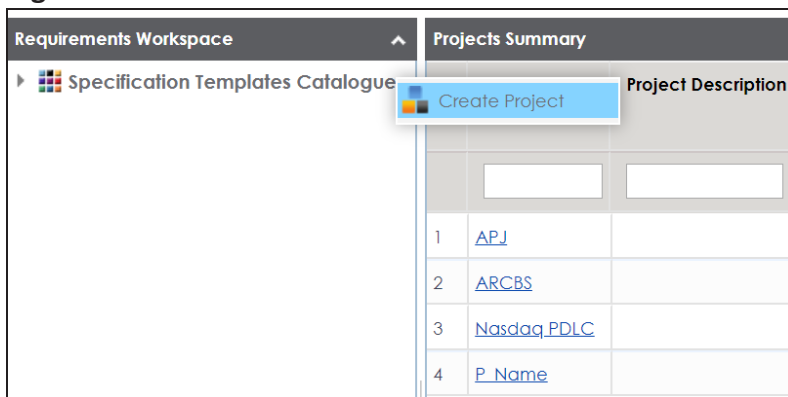
- [Creating and managing projects](#)
- [Creating and managing specifications](#)
- [Linking the requirements to mappings](#)

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.

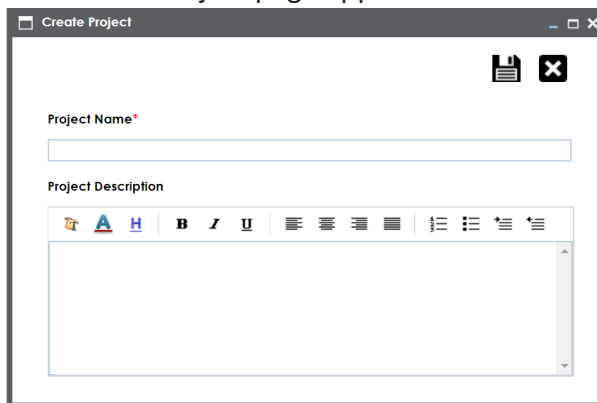
To create projects, follow these steps:

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

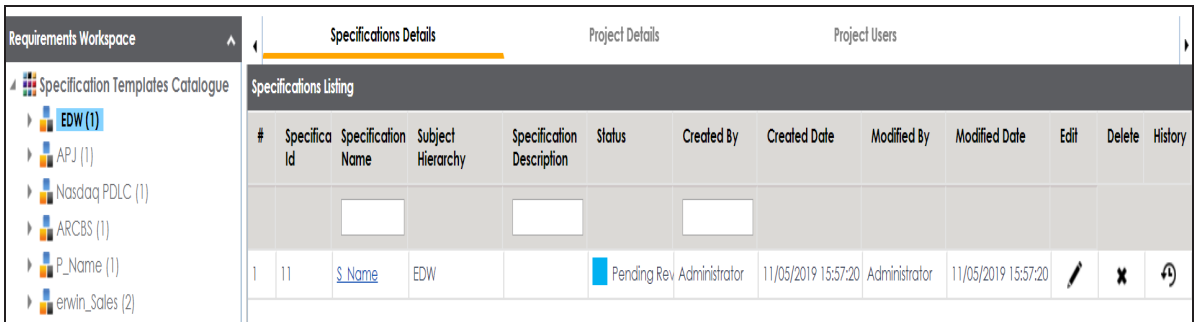
Configure Users

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.

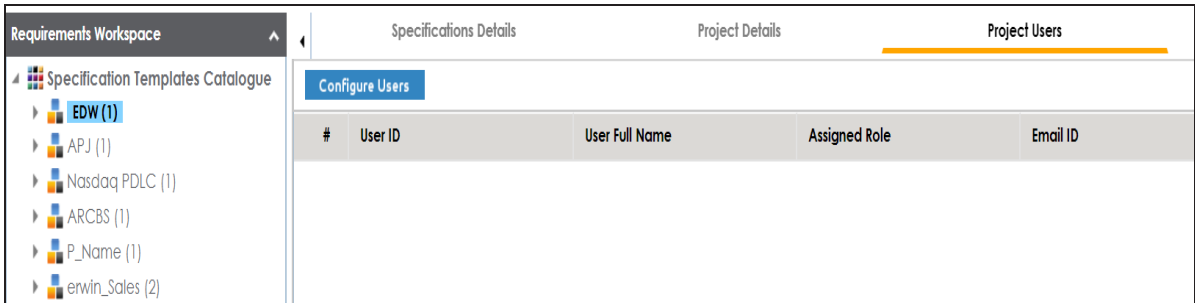
The following page appears.



The screenshot shows the 'Requirements Workspace' interface. On the left is a 'Specification Templates Catalogue' tree with items like EDW (1), APJ (1), Nasdaq.PDLC (1), ARCBS (1), P_Name (1), and erwin_Sales (2). The main area 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.



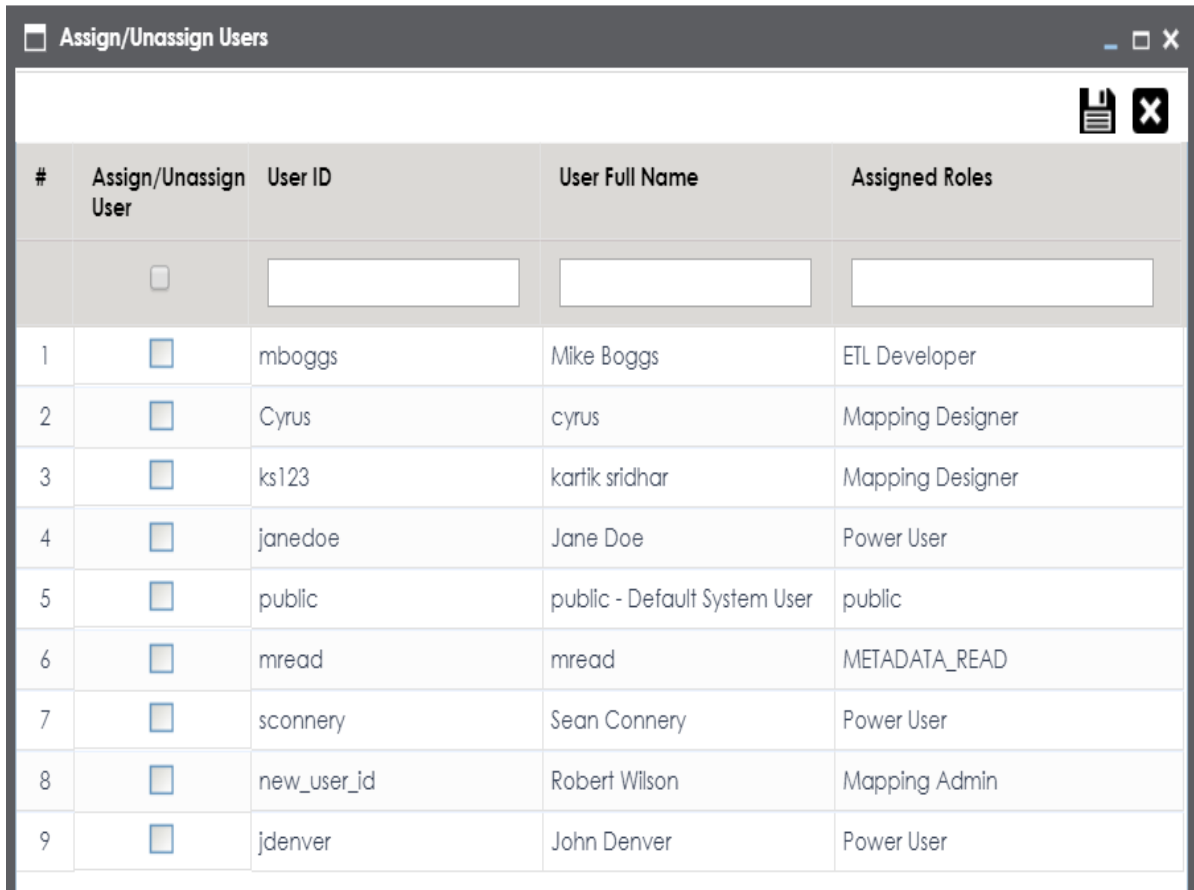
The screenshot shows the 'Requirements Workspace' interface with the 'Project Users' tab selected. A 'Configure Users' button is visible at the top of the main area. Below it is a table with the following columns:

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

3. Click **Configure Users**.

The Assign/Unassign Users page appears.

Configure 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.

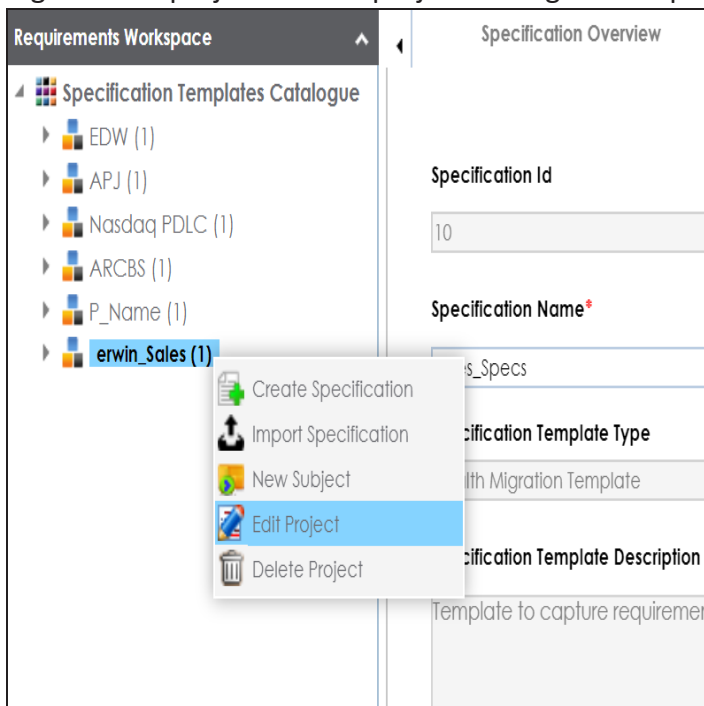
Managing Projects

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

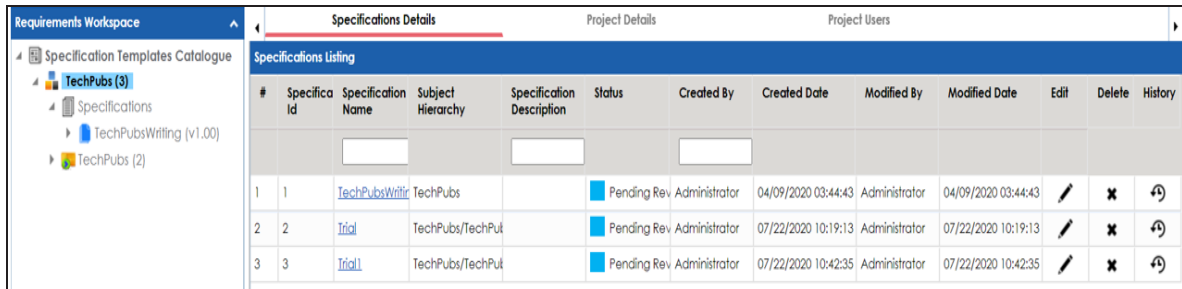
Use this option to update project name and its description. Alternatively, you can follow these steps:

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.



The screenshot shows the Requirements Workspace interface. On the left, the 'Specifications Templates Catalogue' pane is expanded to show 'TechPubs (3)' with sub-items 'Specifications', 'TechPubsWriting (v1.00)', and 'TechPubs (2)'. The main area displays the 'Specifications Listing' table under the 'Specifications Details' tab. The table has columns for #, Specification Id, Specification Name, Subject Hierarchy, Specification Description, Status, Created By, Created Date, Modified By, Modified Date, Edit, Delete, and History. Three rows of specifications are listed, all with a status of 'Pending Rev' and created by 'Administrator'.

#	Specification 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	Trial	TechPubs/TechPub		Pending Rev	Administrator	07/22/2020 10:42:35	Administrator	07/22/2020 10:42:35			

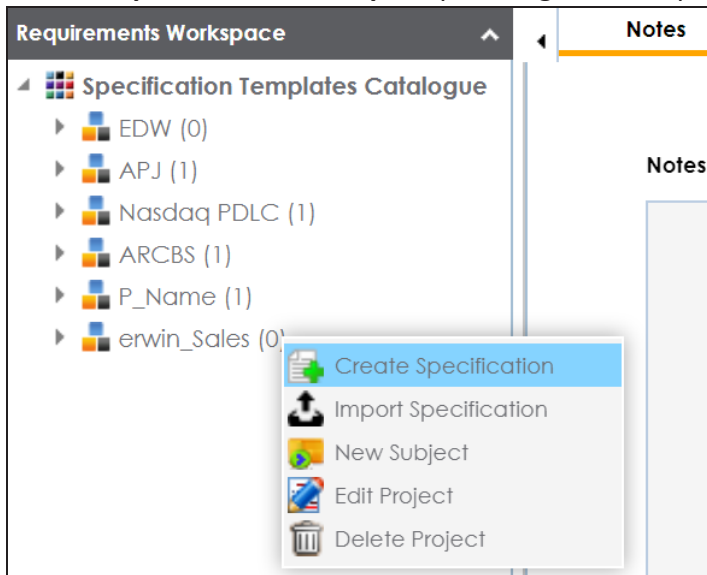
Creating Specifications

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

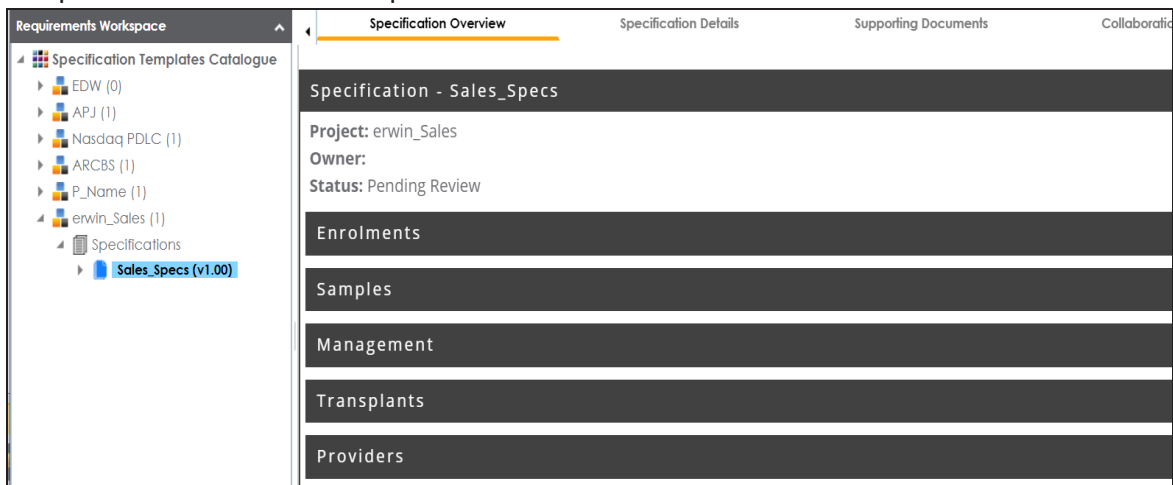
Documenting Requirements



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.

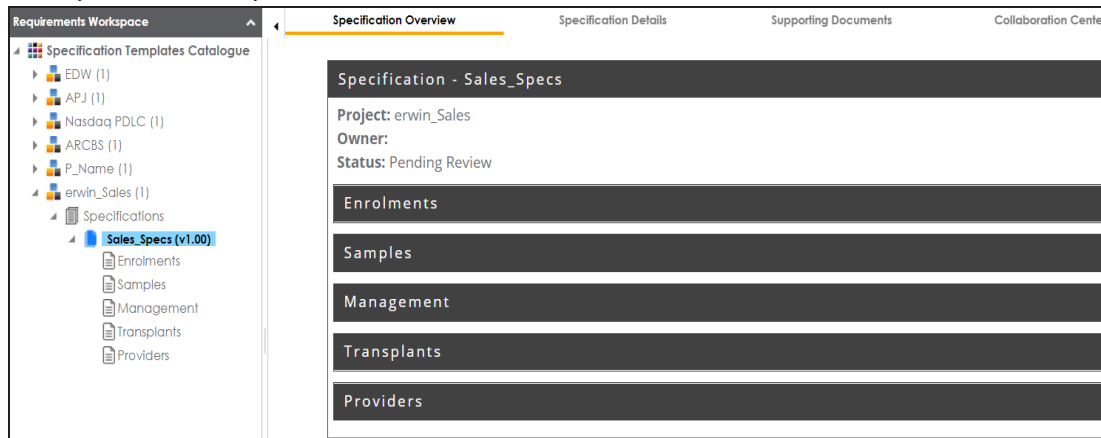
Adding Supporting Documents

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:

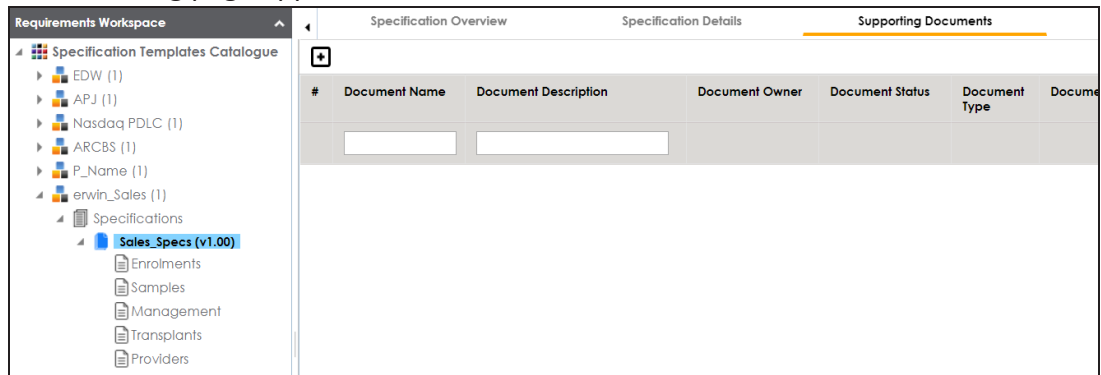
1. In the **Requirements Workspace** pane, select a specification.

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

The screenshot shows a 'New Document Form' with the following elements:

- Document Name***: A text input field with a red asterisk indicating it is mandatory.
- Document Object**: A large area for drag-and-drop or a blue upload icon.
- Document Owner**: A text input field.
- Document Link**: A text input field.
- Document Description**: A rich text editor with a toolbar containing icons for text color, bold, italic, underline, bulleted list, numbered list, link, unlink, and undo.
- Approval Required Flag**: A checkbox at the bottom left.

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

Field Name	Description
Document Name	Specifies the name of the document being attached to the specification. For example, Functional Requirements.
Document Object	Drag and drop document files or click  to select and upload document files.
Document Owner	Specifies the document owner's name.
Document Link	Specifies the URL of the document. For example, 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 .
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:

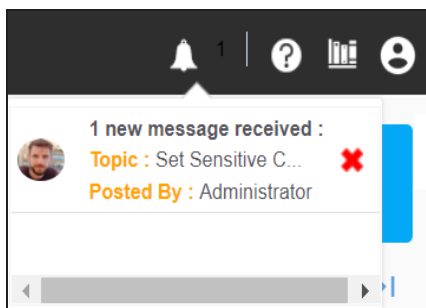
Assigned

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.

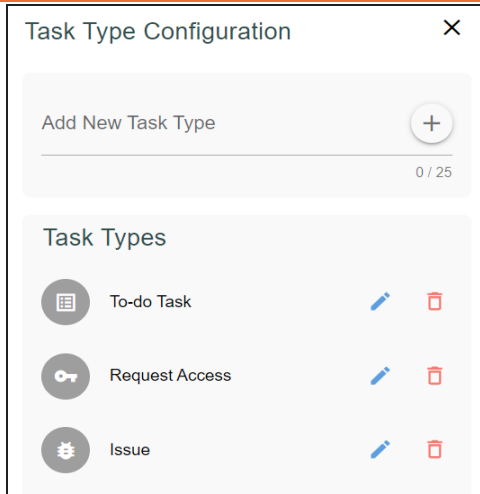
You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue, are available. You cannot edit or delete these task types.


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.

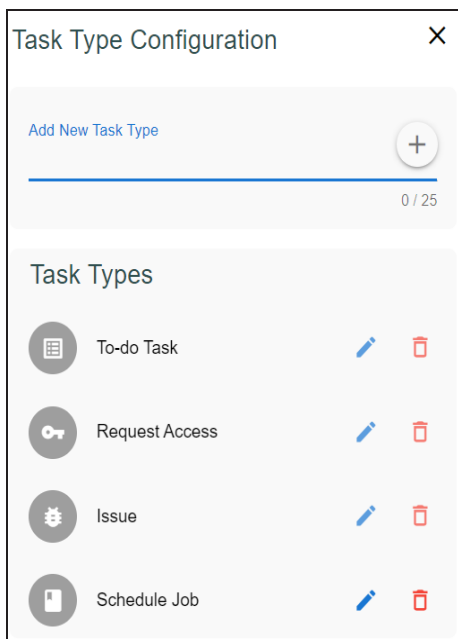
Adding Tasks



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

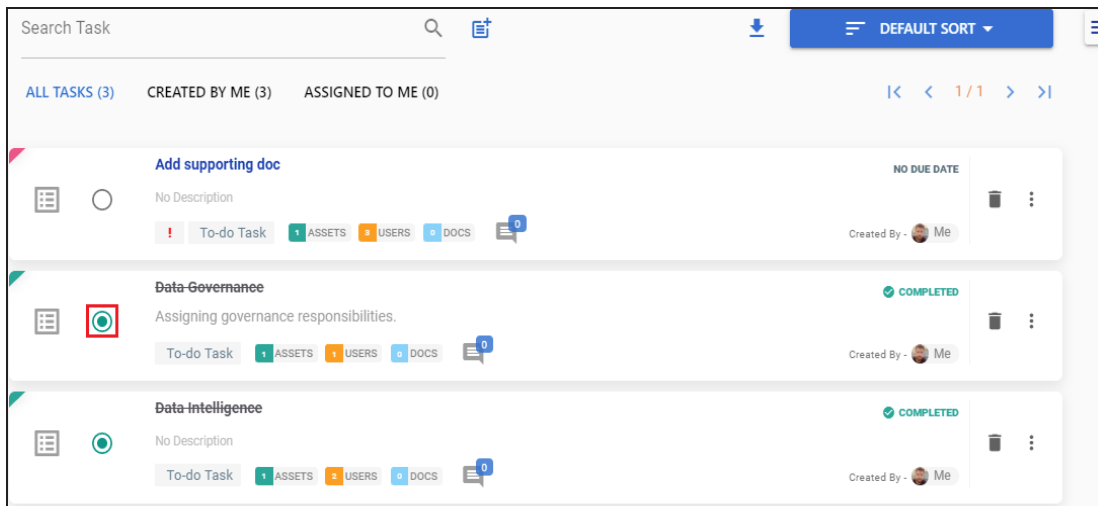
Managing tasks involves:

- 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.

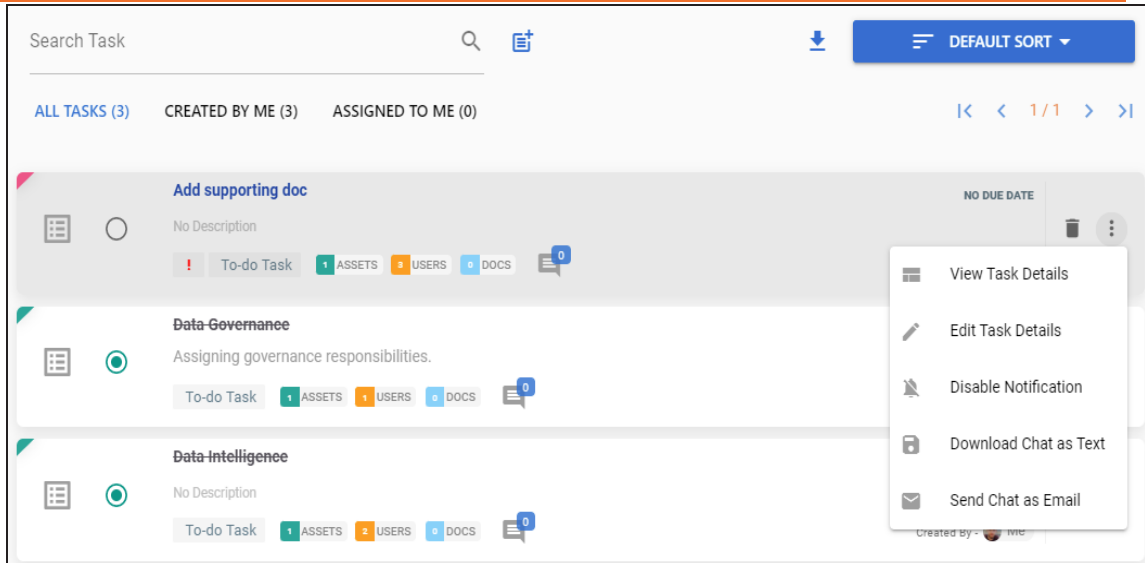


To further manage tasks, follow these steps:

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

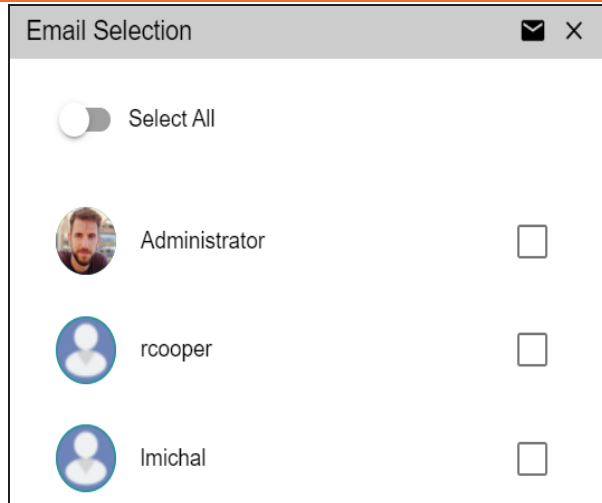
Use this option to download chat related to a task in the TXT format.

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 .



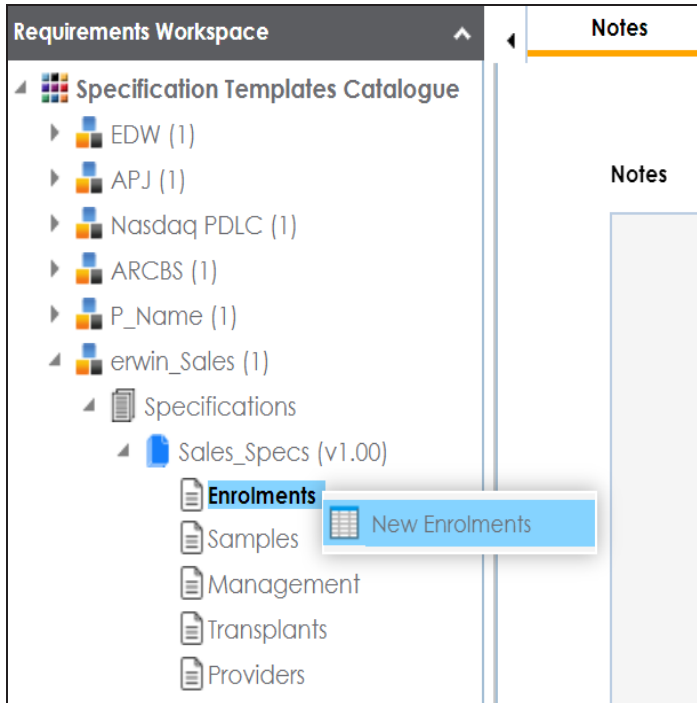
You can delete a task only if you have created it.

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

The screenshot shows a window titled "New Specification Artifact". It has three main sections: "Name*" with a text input field, "Description" with a rich text editor toolbar and a text area, and "Mail Comments" with a text input field. The window also has standard OS window controls (minimize, maximize, close) and a save icon.

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

The screenshot displays a software interface for managing requirements. On the left is a 'Requirements Workspace' tree view showing a hierarchy of templates and specifications. The main area is titled 'Specification Overview' and shows details for a specification named 'Sales_Specs'. The project is 'erwin_Sales', owned by 'janedoe', and is in a 'Pending Review' status. Below this, there are sections for 'Enrolments' and 'Enrollments from Health Care'. The 'Enrollments from Health Care' section contains a table with columns for 'Status', 'Analyst', and 'Approval Date'. The 'Status' column shows 'Draft', and the 'Analyst' column shows 'Select Analyst'. A rich text editor is visible at the bottom of the table.

Requirements Workspace

- Specification Templates Catalogue
 - EDW (1)
 - APJ (1)
 - Nasdaq PDLC (1)
 - ARCBS (1)
 - P_Name (1)
 - erwin_Sales (2)
 - Specifications
 - Sales_Specs (v1.01)**
 - Enrolments
 - Enrollments from Health Care
 - Samples
 - Management
 - Transplants
 - Providers
 - Archive
 - Health_Check (v1.00)
 - C_Project (1)
 - C_Sales (1)

Specification Overview

Specification Details Supporting Documents Collaboration Center

Specification - Sales_Specs

Project: erwin_Sales
Owner: janedoe
Status: Pending Review

Enrolments

As of May 1, 2014, we enrolled more than 232,000 customers in erwinDIS. More North Carolinians companies in health insurance purchased erwinDIS. We need to explore the enrollment to figure out the whole story.

Enrollments from Health Care

Status	Analyst	Approval Date
Draft	Select Analyst	

Summary

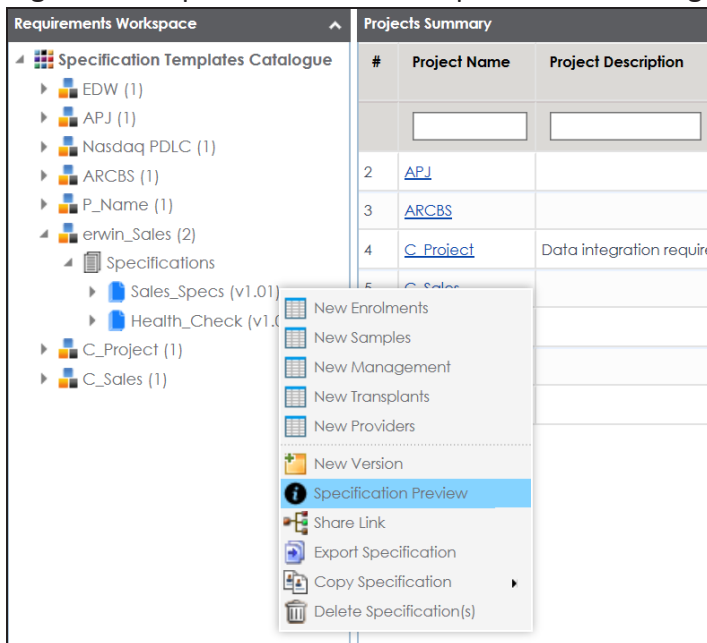
Managing Specifications

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 shareable specification URL. You can copy the URL to share or send the URL through an email using an email client.

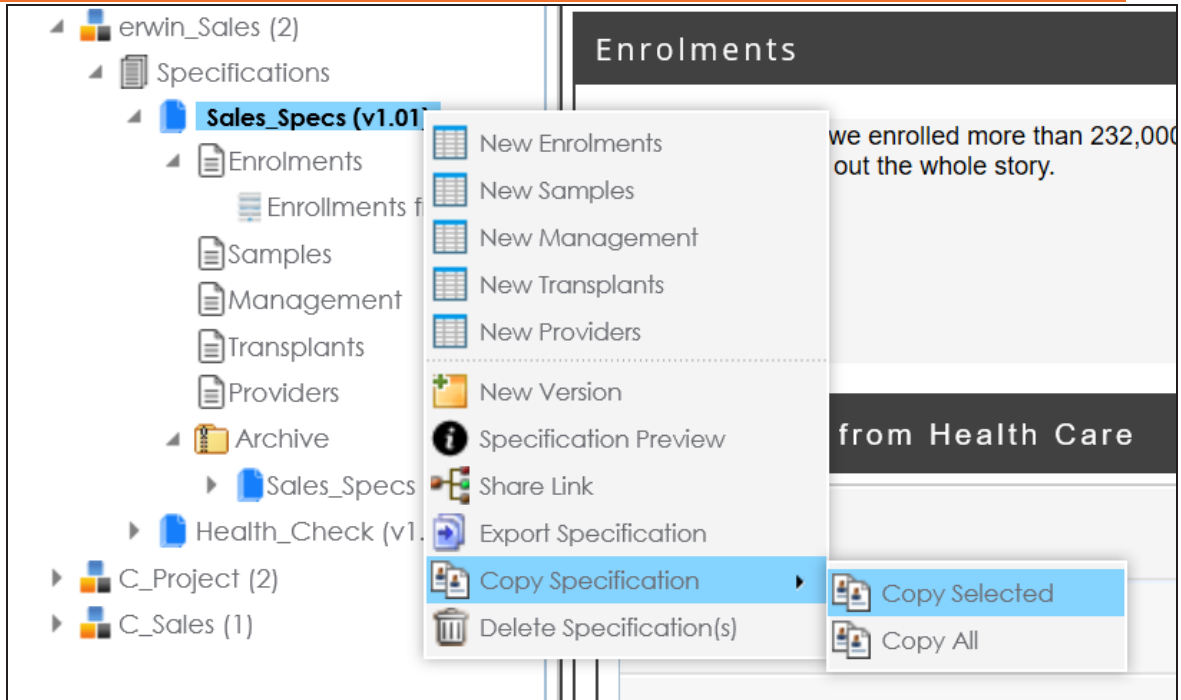
Export Specification

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.

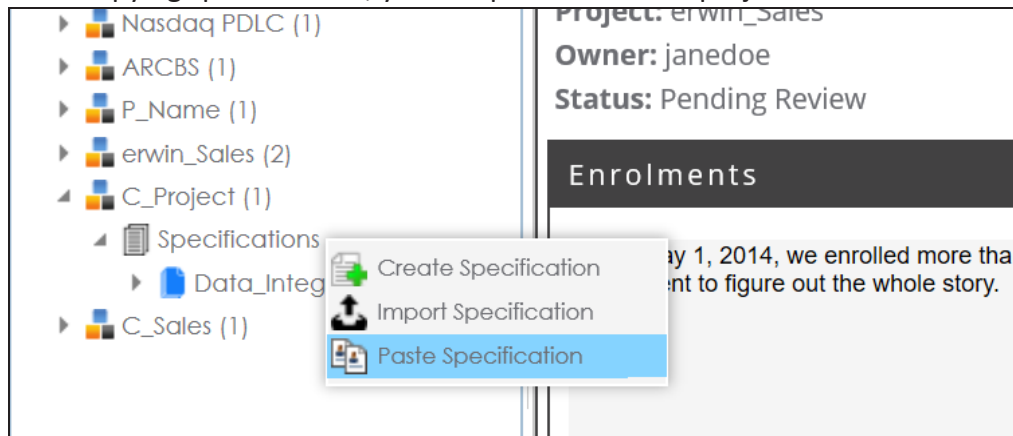
Managing Specifications



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.

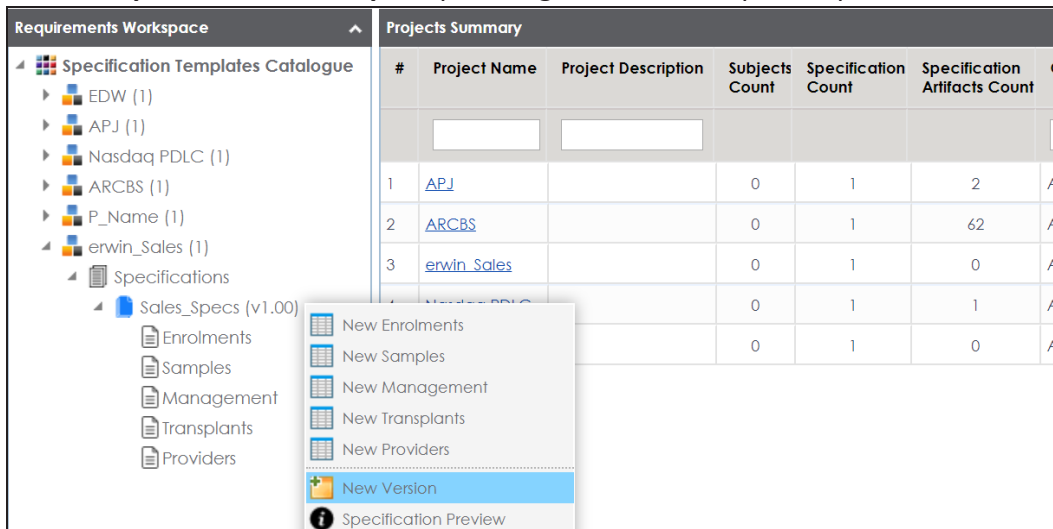
1. Click the **Specifications** node.
The specification Listing pager appears.
2. Click .
The Specification Details page appears in edit mode.
3. Update the required fields and click .
The specification is updated.

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

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	For example: The new version of the specification contains one more child artifact. For more information on sending mail comments to project users, refer to the Configuring Email Settings topic.

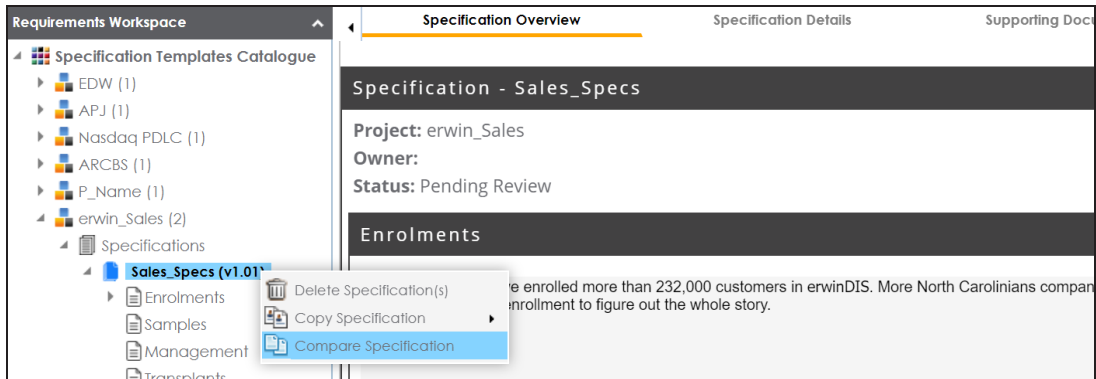
4. Click .

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:
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

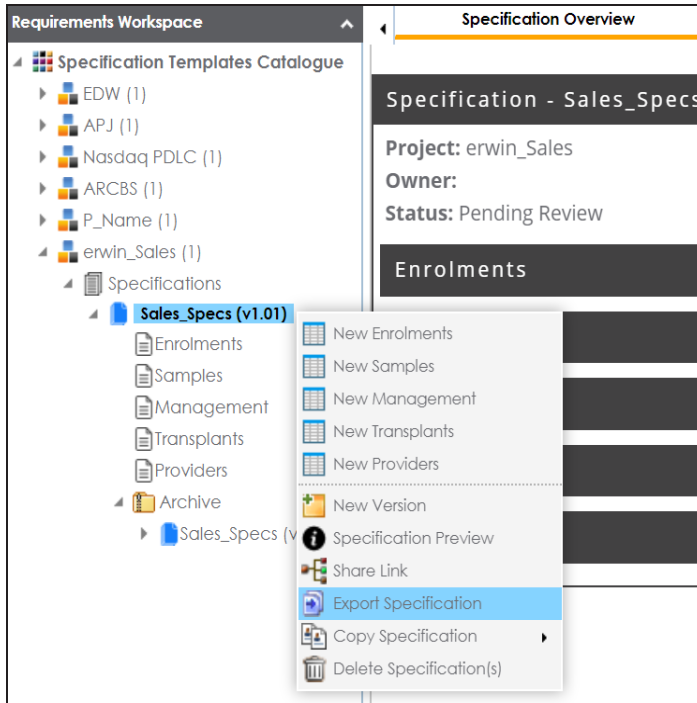
- - Changed Presentation
- - Unchanged Presentation

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:

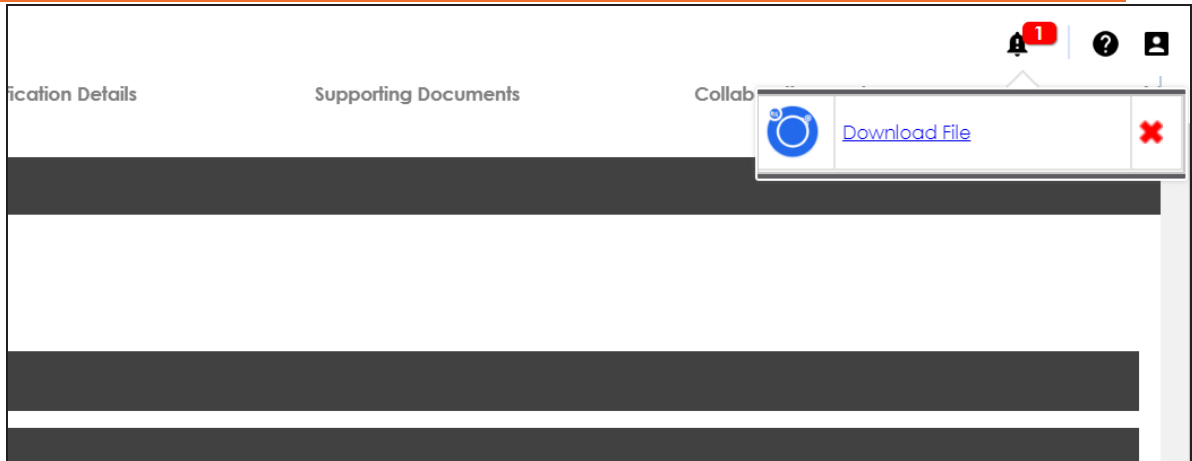
1. In the **Requirements Workspace** pane, right-click the required specification.



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.

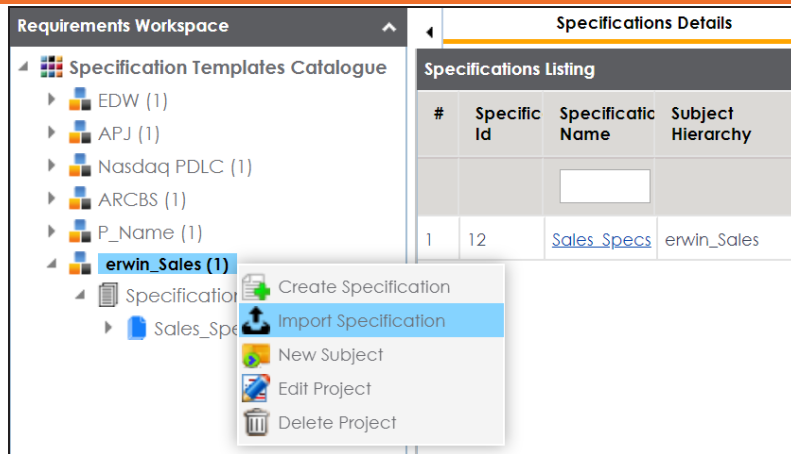
The unzipped folder contains the exported specification in the .xml format.




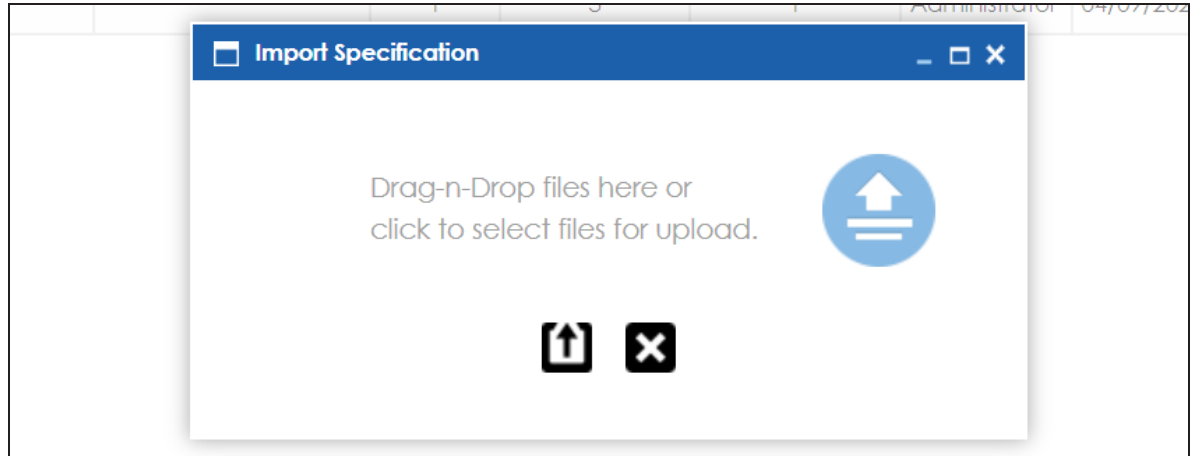
If you are importing the specification to the same project, then change the Specification Name and the Template Name in the .xml file. If you are importing the specification to a different project, you can import the .xml file as it is.

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.

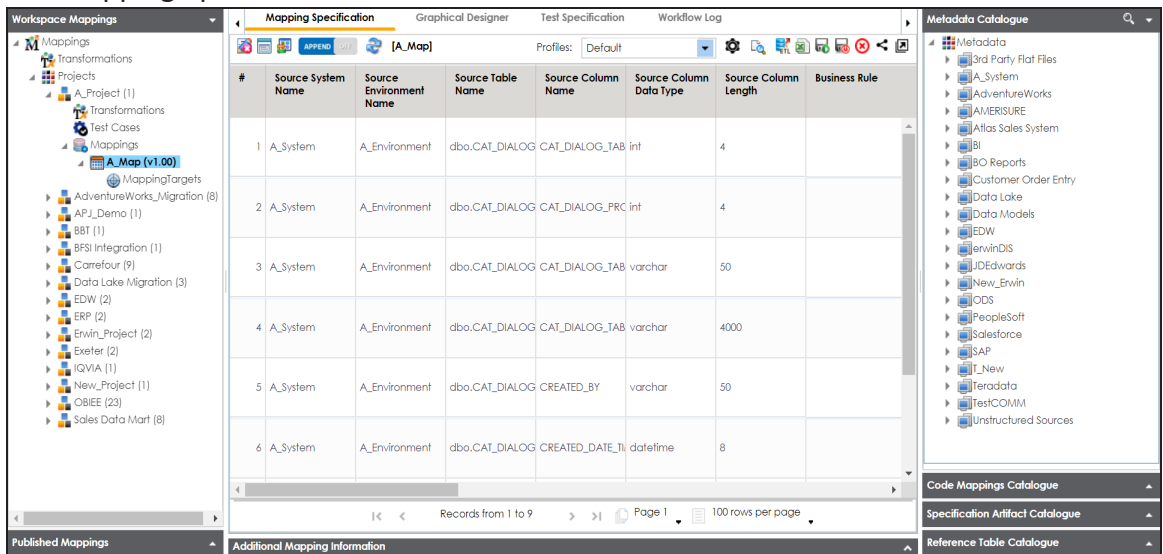
Linking Requirements to Data Mappings

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

To link functional requirements to mappings, follow these steps:

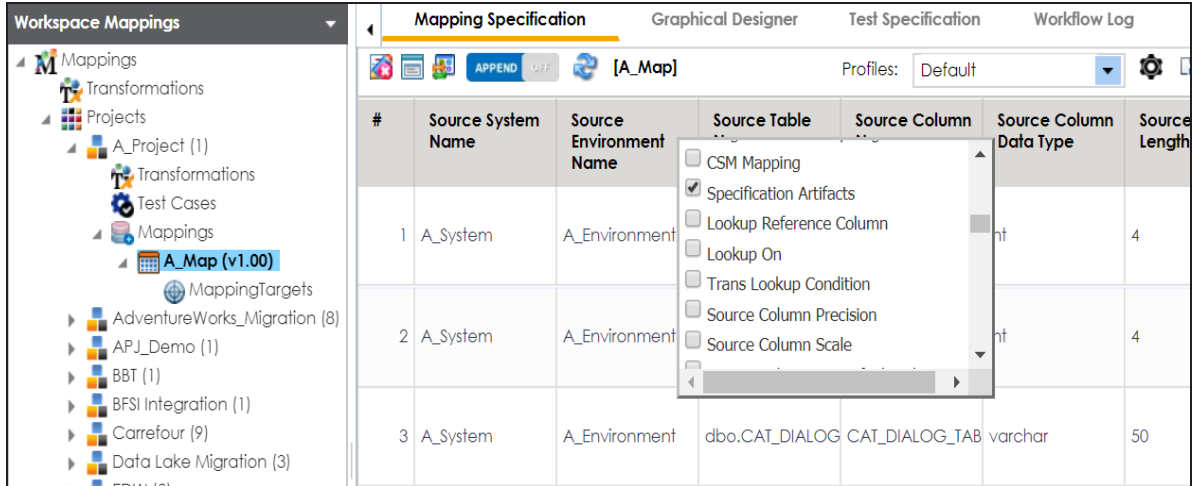
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Click a mapping.

The mapping opens in the detailed view.

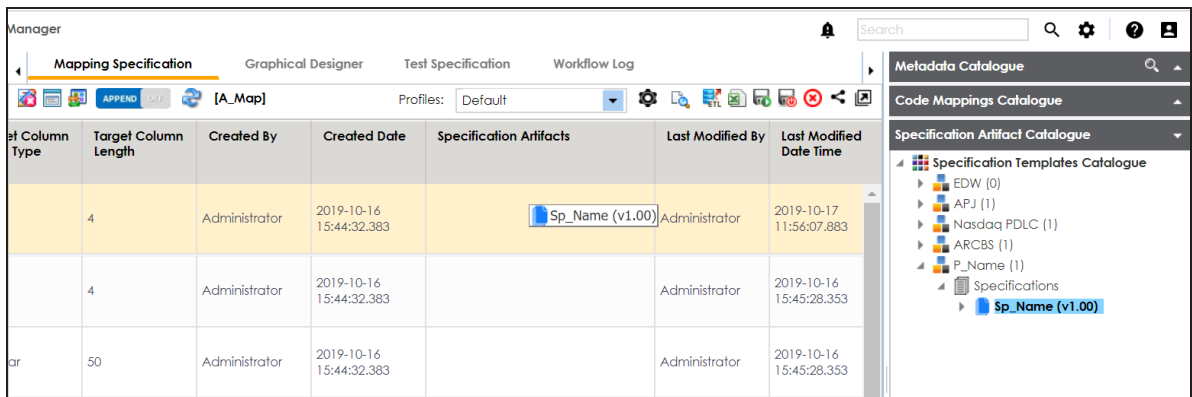



3. On the **Mapping Specification** tab, right click the grid header.
A list of header columns appears.

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.



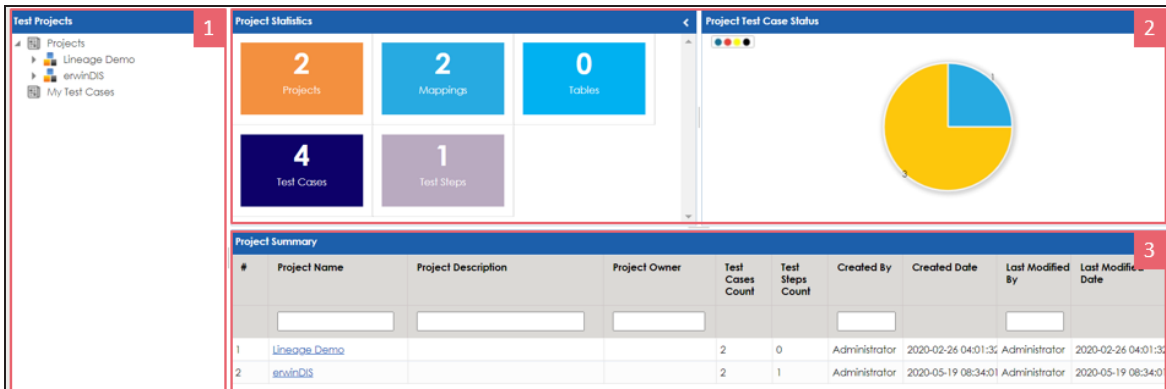
8. Click .
Requirements are linked to the selected mapping.

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:

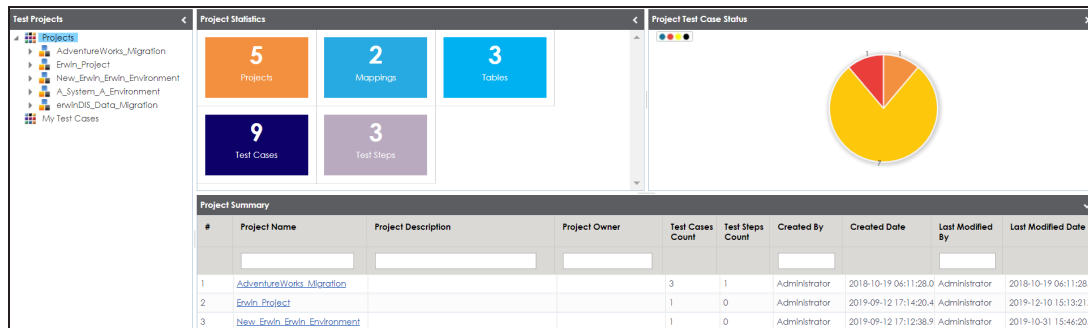
- [Creating and Managing Test Cases for Mappings](#)
- [Creating and Managing Test Cases for Tables](#)

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.

The screenshot displays the Test Manager interface for the project 'erwinDIS_Data_Migration'. The interface is divided into three main sections:

- Test Case Statistics:** Shows 1 Tables, 2 Test Cases, and 1 Test Steps.
- Test Case Status:** A pie chart showing the distribution of test case statuses.
- Test Case Summary:** A table listing test cases with columns for Test Case Id, Test Case Name, Test Case Label, Type of Testing, Description, Priority, and Test Case Status.

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

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 software 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', 'T_Name', and 'My Test Cases'. The 'Source_Data' node is selected. The main window 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]
- 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.

Viewing and Analyzing Test Cases

Test Projects

- Projects
 - AdventureWorks_Migration
 - Erwin_Project
 - New_Erwin_Erwin_Environment
 - A_System_A_Environment
 - erwinDIS_Data_Migration
- My Test Cases
 - TC_00_AccountDescription_Rec
 - Map_Level
 - A_Test
 - M_Test
 - Source_Data
 - T_Name
 - New_Association
 - T_Name
 - Customer_Profile

Test Case Statistics [User]: Administrator

5

Projects

2

Mappings

3

Tables


9

Test Cases

3

Test Steps

Test Case Status [User]: Administrator

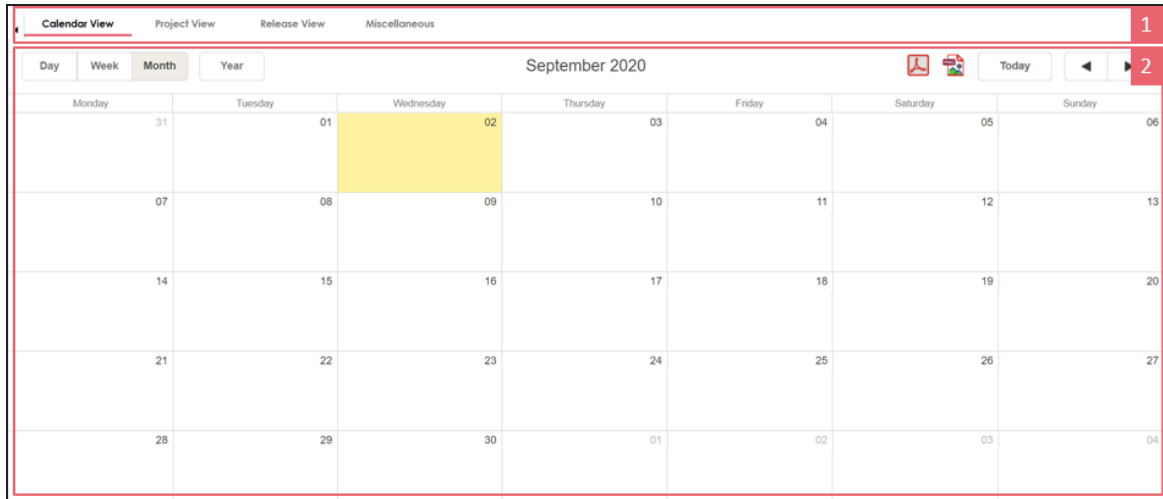


Test Case Summary [User]: Administrator

#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Priority	Test Case Status
1	8	TC_00_AccountDescription_Rec		MANUAL	Validate the Record Count for Acco		DESIGN
2	23	Map_Level					Failed
3	25	A_Test					
4	24	M_Test					

Using Release Manager

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



UI Section	Function
1-Browser Pane	Use this pane to browse through releases and miscellaneous options. You can switch between different views to see releases: <ul style="list-style-type: none"> ▪ 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.

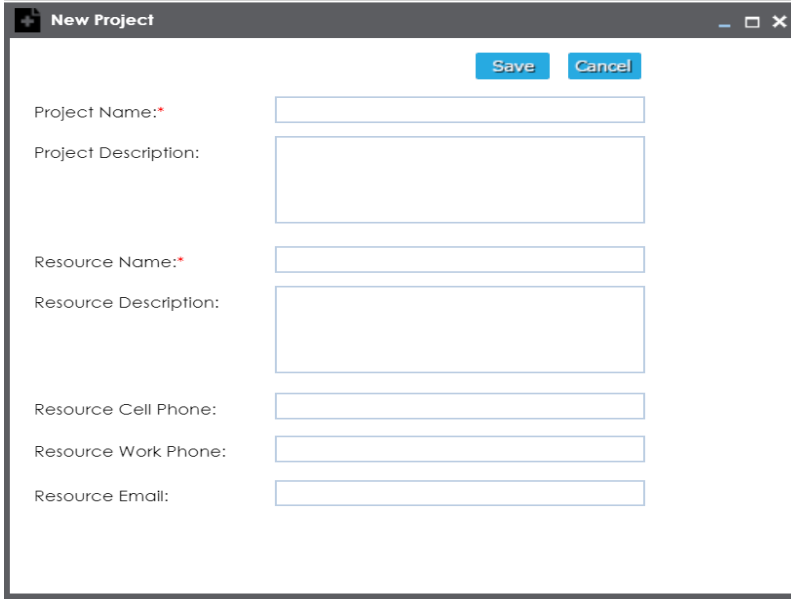
The screenshot displays the Release Manager interface in Project View. It features a navigation bar with tabs for Calendar View, Project View (selected), Release View, and Miscellaneous. The main content area is divided into several sections:

- Project Listing:** A table with columns for #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. It lists two projects: EDW and New_Project.
- Project Details:** A sidebar for the selected project (EDW), showing its description, resource name (Kartik Sridhar), and resource email.
- Release Listing for EDW:** A table with columns for #, Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. It lists four releases, all with a status of PENDING APPROVAL.
- Release Summary - By Status:** A pie chart showing 100% of releases are in the PENDING APPROVAL status.
- Release Summary - By Owner:** A pie chart showing the distribution of releases by owner: 50% Unassigned, 25% janedoe, and 25% ks123.

2. Click **Add Project**.

The New Project page appears.

Creating Projects and Adding Releases



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.

Project Listing :									
#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
1	EDW	Karlik 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									
#	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

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.

The screenshot displays the 'Project Listing' and 'Release Listing' sections. The 'Project Listing' table has columns for Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The 'Release Listing' table has columns for Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. The 'Project Details' sidebar shows the project name, description, resource name, and resource email. The 'Release Summary - By Status' gauge shows 100% PENDING APPROVAL, and the 'Release Summary - By Owner' gauge shows 100% Unassigned.

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 software interface with a 'Project View' tab selected. The 'Project Listing' table has the following data:

#	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		

Below the project listing, the 'Release Listing for: Project_Name' table is shown with 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		

On the right side, the 'Project Details' panel shows 'Project_Name' with a description and resource information. Below it, two 'Release Summary - By Status' and 'Release Summary - By Owner' charts are displayed, both showing 100% completion with a red progress indicator.

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

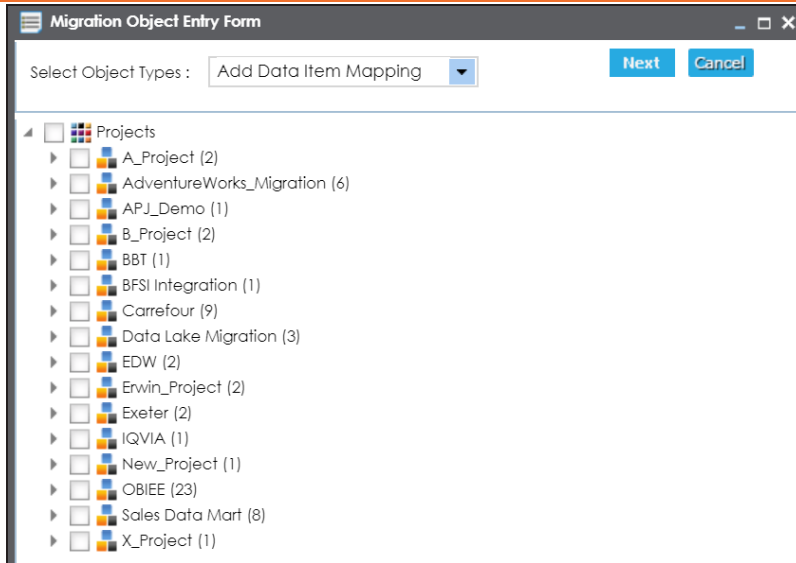
The screenshot shows a window titled "Migration Object Entry Form". At the top, there is a "Select Object Types:" dropdown menu currently set to "Add Miscellaneous Objects", with "Save" and "Cancel" buttons to its right. The form contains the following fields:

- Object Name:*
- Object Description:
- Object Type: DDL Script
- Choose File: Choose File | No file chosen
- Live Date / Time:*
- Migration Date / Time:*
- Migration From: DEV
- DSN:
- IP Address:
- Migration To: DEV
- DSN:
- IP Address:
- Owner/Assignee: -Select-

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

The following page appears.

Adding Data Item Mappings as Release Objects

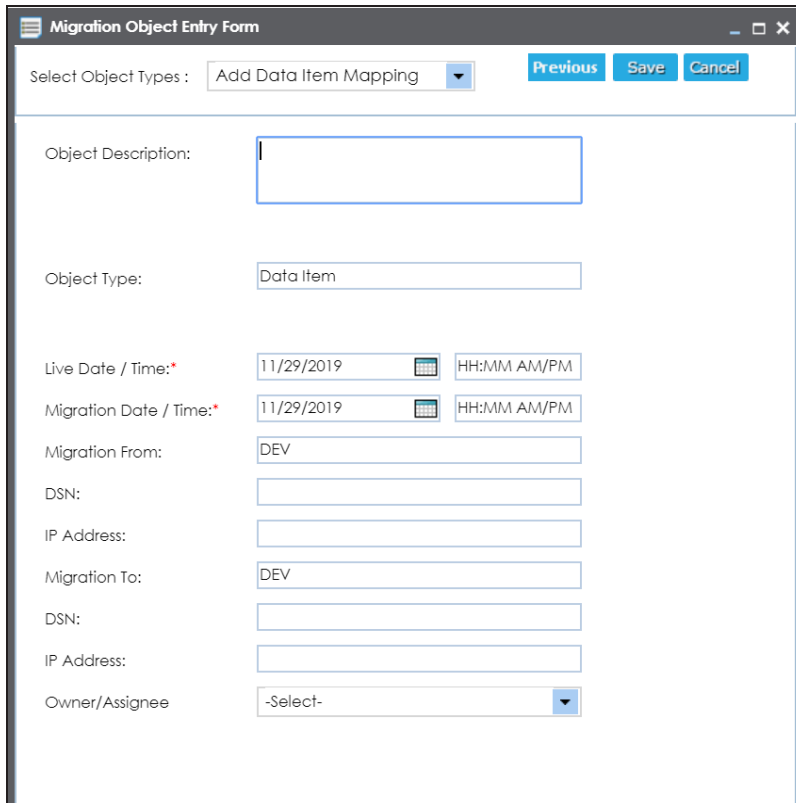


The screenshot shows the "Migration Object Entry Form" window. At the top, there is a "Select Object Types:" dropdown menu set to "Add Data Item Mapping". To the right of this menu are "Next" and "Cancel" buttons. Below the menu is a tree view of projects. The tree is expanded to show a list of projects, each with a checkbox and a small icon. The projects listed are:

- 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 screenshot shows the "Migration Object Entry Form" window after clicking "Next". The "Select Object Types:" dropdown menu is still set to "Add Data Item Mapping". To the right of this menu are "Previous", "Save", and "Cancel" buttons. Below the menu are several input fields for object details:

- Object Description: [Empty text box]
- Object Type: Data Item
- Live Date / Time:* 11/29/2019 [Calendar icon] HH:MM AM/PM
- Migration Date / Time:* 11/29/2019 [Calendar icon] HH:MM AM/PM
- Migration From: DEV
- DSN: [Empty text box]
- IP Address: [Empty text box]
- Migration To: DEV
- DSN: [Empty text box]
- IP Address: [Empty text box]
- Owner/Assignee: -Select- [Dropdown arrow]

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-warehouse project.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.
Migration Date / Time	Specifies the migration date and time of the release object from the DEV release environment. 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 environment 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', and 'Miscellaneous'. Below the tabs, there are several summary charts: 'Release Summary - By Status' (showing 'PENDING APPROVAL-4'), 'Release Summary - By Owner' (showing 'Unassigned - 4'), and 'Release Summary - By Type' (showing 'Code Set - 1', 'Data Item - 2', and 'DDL Script - 1'). Below the charts 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] [Download] [Email] [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] [Download] [Email] [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] [Download] [Email] [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] [Download] [Email] [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. 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 is a 'Release Listing for: Project_Name' section with a table for releases, including Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. The release listing shows one release named 'Release_Name' with a status of 'PENDING APPROVAL'. To the right, there are 'Project Details' and 'Release Summary - By Status' and 'Release Summary - By Owner' sections, each containing a red circular progress indicator at 100%.

2. Click the required <Release_Name>.

The Release View tab appears.

The screenshot shows the 'Release View' tab in the Release Manager. It features a 'Release Name' section with a calendar icon for Nov 29, Fri, and a 'PENDING APPROVAL' status. Below this are three 'Release Summary' charts: 'By Status' (100% PENDING APPROVAL-1), 'By Owner' (100% Unassigned - 1), and 'By Type' (100% Data Item - 1). At the bottom, there is a 'Release Object Details' table with columns for Object Name, Object Status, Type, Version, Date/Time (Live Date, Migration Date), Migration Details (From, To), Owner, Created By, Create Date, and Options. The table lists one object named 'Erwin_Map' with a status of 'PENDING APPROVAL' and a type of 'Data Item'.

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.

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

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

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.

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

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

Version Label: [Empty]

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	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 Item Repository

- Data Mapping Objects
- Erwin_Map

Promotion Details

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

Version Label: [Empty]

Publish Notes*
The data item mappings can be promoted to Test environment.

Change Description*
The mappings will be moved to corresponding test environment.

Success Message

Promote Environments Successfully Assigned

9. Click **Validate**.

The promotion is successfully validated.

Promoting Data Item Mappings

The screenshot shows the 'Promote' dialog in the Data Mapping Manager. On the left, a tree view shows 'Data Mapping Objects' and 'Erwin_Map'. The main area contains the following fields and controls:

- Promote To:** A dropdown menu set to 'TEST'.
- Effective Date:** A date field set to '11/29/2019'.
- Version Label:** An empty text input field.
- Publish Notes*:** A rich text editor with a toolbar (Bold, Italic, Underline, Undo) and the text: 'The data item mappings can be promoted to Test environment.'
- Change Description*:** A rich text editor with a toolbar (Bold, Italic, Underline, Undo) and the text: 'The mappings will be moved to corresponding test environment.'

At the top right, there are two buttons: 'Validate' (highlighted in red) and 'Promote' (green). At the bottom right, the text 'Successfully Validated' is displayed.

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 is a 'Release Listing for: Project_Name' section with a table for releases, including columns for Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. The release table shows one release named Release_Name with a status of 'PENDING APPROVAL'. To the right of the tables are two circular progress indicators: 'Release Summary - By Status' showing 100% for 'PENDING APPROVAL' and 'Release Summary - By Owner' showing 100% for 'Unassigned'. The interface also includes navigation tabs (Calendar View, Project View, Release View, Miscellaneous) and various action buttons like 'Add Project', 'Export to Excel', and 'Share'.

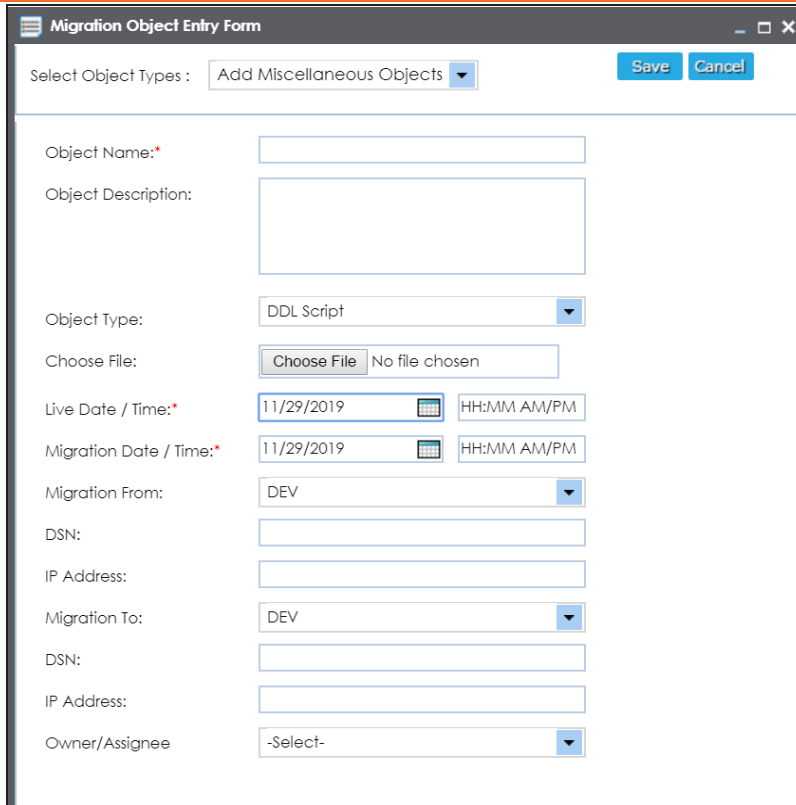
2. Click the required <Release_Name>.

The Release View page appears.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Adding Codeset as Release Objects



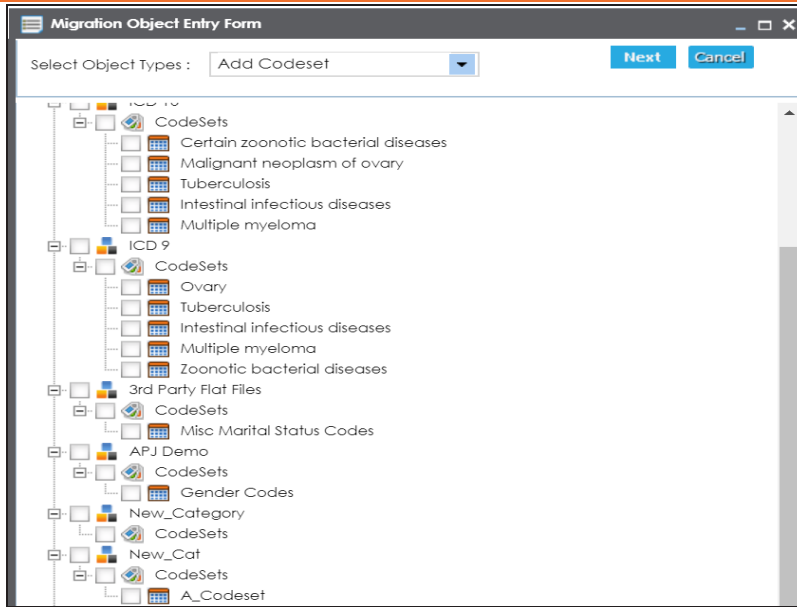
The screenshot shows a window titled "Migration Object Entry Form". At the top, there is a "Select Object Types:" dropdown menu currently set to "Add Miscellaneous Objects", and "Save" and "Cancel" buttons. The form contains the following fields:

- Object Name:*
- Object Description:
- Object Type: DDL Script
- Choose File: Choose File | No file chosen
- Live Date / Time:*
- Migration Date / Time:*
- Migration From: DEV
- DSN:
- IP Address:
- Migration To: DEV
- DSN:
- IP Address:
- Owner/Assignee: -Select-

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

The following page appears.

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 with the following fields and values:

- Select Object Types:** Add Codeset (dropdown menu)
- Buttons:** Previous, Save, Cancel
- Object Description:** (empty text box)
- Object Type:** Code Set (text box)
- Live Date / Time:** 11/29/2019 (calendar icon), HH:MM AM/PM (time picker)
- Migration Date / Time:** 11/29/2019 (calendar icon), HH:MM AM/PM (time picker)
- Migration From:** DEV (dropdown menu)
- DSN:** (empty text box)
- IP Address:** (empty text box)
- Migration To:** DEV (dropdown menu)
- DSN:** (empty text box)
- IP Address:** (empty text box)
- Owner/Assignee:** -Select- (dropdown menu)

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	Specifies the description about the release object being added to the release. For example: The release object is a codeset under the 3rd Party Flat Files category.
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

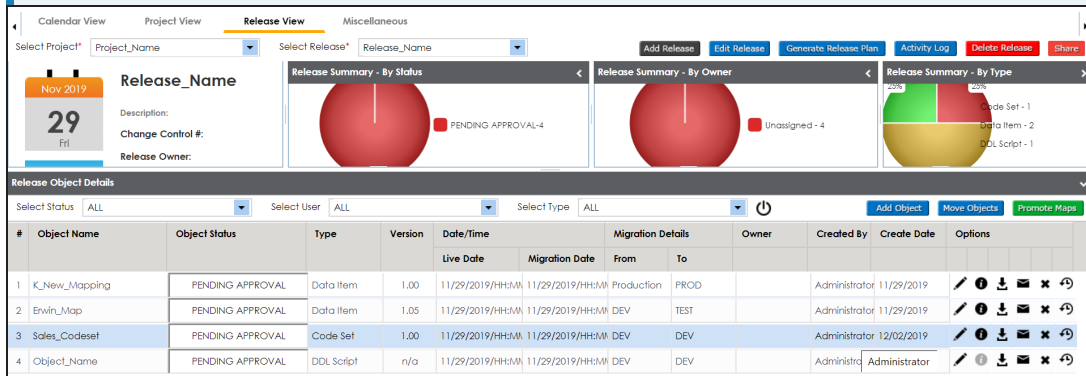
Adding Codeset as Release Objects

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. At the top, there are tabs for Calendar View, Project View, Release View (selected), and Miscellaneous. Below the tabs, there are dropdown menus for 'Select Project*' and 'Select Release*'. The main area displays 'Release Summary - By Status', 'Release Summary - By Owner', and 'Release Summary - By Type'. Below this is the 'Release Object Details' section, which includes 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	    
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST		Administrator	11/29/2019	    
3	Sales_Codeset	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	    
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	Administrator	    

8. Use the following options:

Edit

To edit the release object, click .

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

Information


To view the mapping information, click .

Download

To download the release object details, click .

Email

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. 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 is a 'Release Listing for: Project_Name' section with a table showing release details like 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, there are two pie charts: 'Release Summary - By Status' showing 100% PENDING APPROVAL, and 'Release Summary - By Owner' showing 100% Unassigned. The interface also includes navigation buttons like 'Add Project', 'Export to Excel', and 'Share'.

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

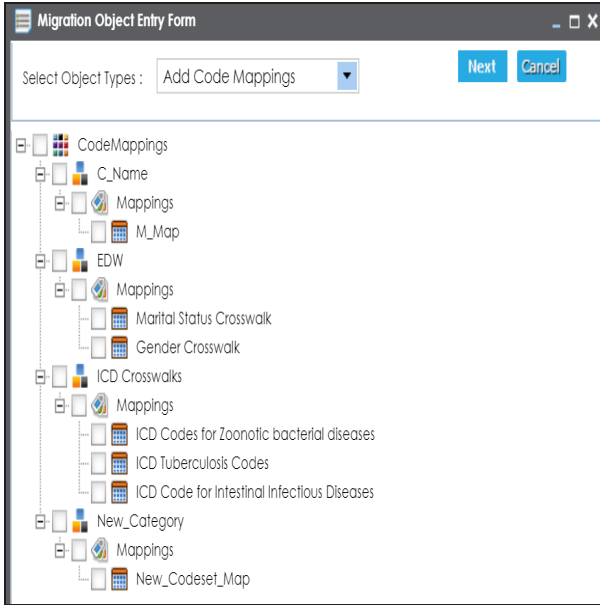
The screenshot shows a window titled "Migration Object Entry Form". At the top, there is a "Select Object Types:" dropdown menu with "Add Miscellaneous Objects" selected. To the right of this menu are "Save" and "Cancel" buttons. The form contains the following fields:

- Object Name:*
- Object Description:
- Object Type: DDL Script
- Choose File: Choose File | No file chosen
- Live Date / Time:*
- Migration Date / Time:*
- Migration From: DEV
- DSN:
- IP Address:
- Migration To: DEV
- DSN:
- IP Address:
- Owner/Assignee: -Select-

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

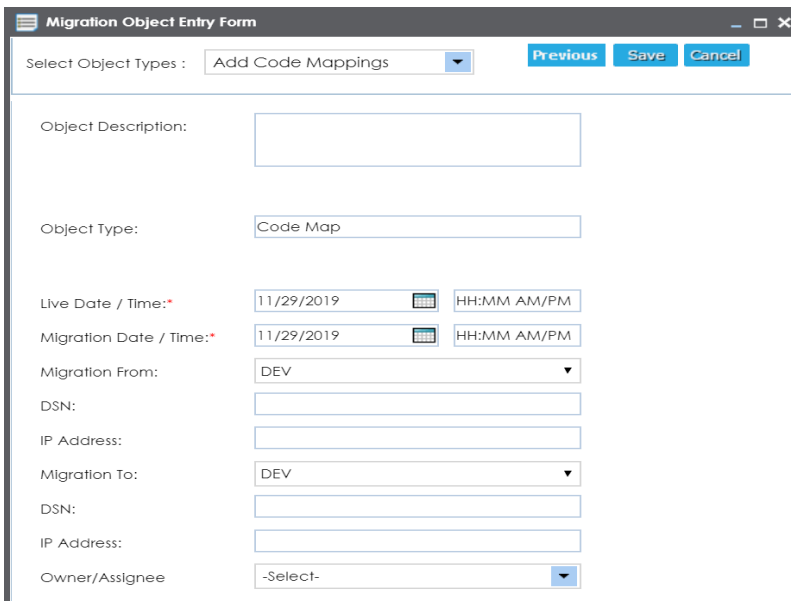
The following page appears.

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 with the 'Add Code Mappings' dropdown selected. The 'Next' button is replaced by 'Previous', 'Save', and 'Cancel' buttons. The form contains several input fields: 'Object Description:' (empty text box), 'Object Type:' (text box containing 'Code Map'), 'Live Date / Time:*' (date and time pickers, both showing '11/29/2019'), 'Migration Date / Time:*' (date and time pickers, both showing '11/29/2019'), 'Migration From:' (dropdown menu showing 'DEV'), 'DSN:' (empty text box), 'IP Address:' (empty text box), 'Migration To:' (dropdown menu showing 'DEV'), 'DSN:' (empty text box), 'IP Address:' (empty text box), and 'Owner/Assignee' (dropdown menu showing '-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	Specifies the description about the release object being added to the release. For example: The release object is a code map under the EDW category.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.
Migration Date / Time	Specifies the migration date and time of the release object from a release environment. For example, 04/30/2020 9:30 PM. Use  to enter the migration date. Enter the migration time in the HH : MM format. The Migration Date cannot exceed the Live Date.
Migration From	Specifies the current release environment of the release object. For example, DEV. You can create release environments in the Release Manager Settings .
DSN	Specifies the DSN name from where the release object is being migrated. For example, ErwinDIS931.
IP Address	Specifies the IP Address from where the release object is being migrated. For example, 10.32.445.21
Migration To	Specifies the release environment to which the release object is being migrated. For example, TEST. You can create release environments in the Release Manager Settings .
DSN	Specifies the DSN name to which the release object is being migrated. For example, ErwinDIS932.
IP Address	Specifies the IP address to which the release object is being migrated. For example, 10.31.447.22
Owner /	Specifies the User ID of the release object's owner.

Adding Code Mappings as Release Objects

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', and 'Miscellaneous'. Below the tabs, there are dropdown menus for 'Select Project*' and 'Select Release*'. The main area displays 'Release Name' with a description, change control number, and release owner. To the right, there are three summary charts: 'Release Summary - By Status' (showing 'PENDING APPROVAL' - 5), 'Release Summary - By Owner' (showing 'Unassigned' - 5), and 'Release Summary - By Type' (a pie chart showing 'Code Map - 1', 'Code Set - 1', 'DDL Script - 1', and 'Item - 2'). Below the charts is a 'Release Object Details' section with filters for 'Select Status', 'Select User', and 'Select Type'. The main part of the screenshot 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	[Edit] [Download] [Email] [Delete] [Refresh]
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST		Administrator	11/29/2019	[Edit] [Download] [Email] [Delete] [Refresh]
3	Sales_Codese1	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	[Edit] [Download] [Email] [Delete] [Refresh]
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV		Administrator	12/02/2019	[Edit] [Download] [Email] [Delete] [Refresh]
5	New_Codese1_Map	PENDING APPROVAL	Code Map	1.01	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST		Administrator	12/02/2019	[Edit] [Download] [Email] [Delete] [Refresh]

8. Use the following options:

Edit (✎)

To edit the release object, click ✎.

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

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 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 contains three rows: 1. EDW (Owner: Karik Sridhar, Last Activity: 11/29/2019, # of Releases: 4, # of Release Objects: 6, Created By: Administrator, Create Date: 10/18/2018), 2. New_Project (Owner: Resource_Name, Last Activity: 10/17/2019, # of Releases: 2, # of Release Objects: 1, Created By: Administrator, Create Date: 09/11/2019), and 3. Project_Name (Owner: Joe Villers, Last Activity: 11/28/2019, # of Releases: 1, # of Release Objects: 0, Created By: Administrator, Create Date: 11/28/2019). Below the table is a 'Release Listing for: Project_Name' section with columns: #, Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. It shows one row: 1. Release_Name (Release Date: 11/28/2019, Release Status: PENDING APPROVAL, Created By: Administrator, Create Date: 11/28/2019). The right sidebar shows 'Project Details' for Project_Name, including Description, Resource Name (Joe Villers), and Resource Email. Below this are two pie 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.

3. Click **Add Object**.


The Migration Object Entry Form page appears.

Adding Miscellaneous Objects

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', and 'Miscellaneous'. Below the tabs, there are dropdown menus for 'Select Project*' and 'Select Release*'. The main area displays 'Release Name', 'Description', 'Change Control #', and 'Release Owner'. There are three summary charts: 'Release Summary - By Status' (showing 'PENDING APPROVAL - 4'), 'Release Summary - By Owner' (showing 'Unassigned - 4'), and 'Release Summary - By Type' (showing 'Code Set - 1', 'Data Item - 2', and 'DDL Script - 1'). Below the charts is a 'Release Object Details' section with filters for 'Select Status', 'Select User', and 'Select Type'. The main table lists the 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] [Download] [Email] [Delete] [Refresh]
2	Erwin_Map	PENDING APPROVAL	Data Item	1.05	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	TEST	Administrator	11/29/2019	[Edit] [Download] [Email] [Delete] [Refresh]
3	Sales_Codesset	PENDING APPROVAL	Code Set	1.00	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV	Administrator	12/02/2019	[Edit] [Download] [Email] [Delete] [Refresh]
4	Object_Name	PENDING APPROVAL	DDL Script	n/a	11/29/2019/HH:MM	11/29/2019/HH:MM	DEV	DEV	Administrator	12/02/2019	[Edit] [Download] [Email] [Delete] [Refresh]

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 in a software interface. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. Below the tabs is a 'Project Listing' table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. Three projects are listed: EDW, New_Project, and Project_Name. The 'Project_Name' project is selected. Below the table, there is a 'Release Listing for: Project_Name' section with a table of releases. The first release is selected. To the right of the release listing, there are two pie charts: 'Release Summary - By Status' showing 100% PENDING APPROVAL, and 'Release Summary - By Owner' showing 100% Unassigned.

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

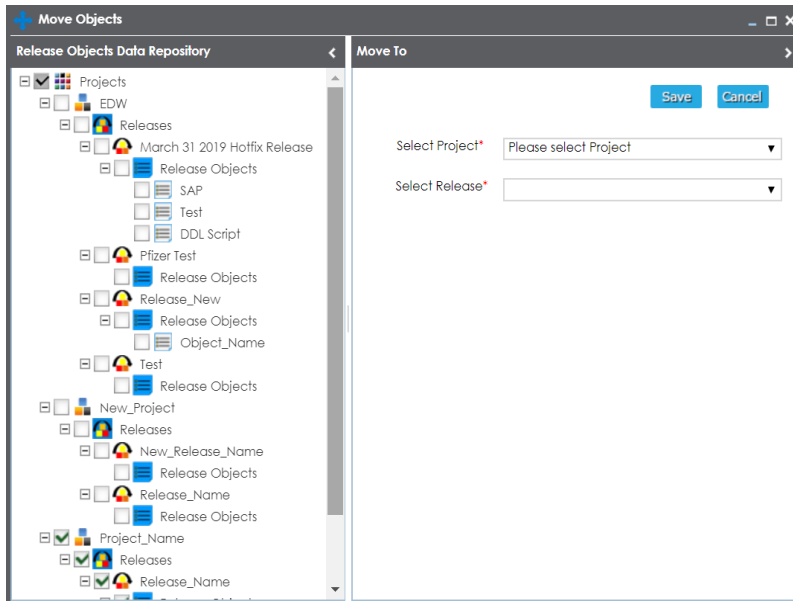
The Release View page appears showing the release object details.

The screenshot shows the 'Release View' tab. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. Below the tabs, there are dropdown menus for 'Select Project*' (Project_Name) and 'Select Release*' (Release_Name). There are buttons for 'Add Release', 'Edit Release', 'Generate Release Plan', 'Activity Log', 'Delete Release', and 'Share'. The main area shows 'Release Name' details, including a calendar icon for Nov 29 Fri, a 'PENDING APPROVAL' status, and fields for 'Description:', 'Change Control #:', and 'Release Owner:'. Below this are three pie charts: 'Release Summary - By Status' (100% PENDING APPROVAL - 5), 'Release Summary - By Owner' (100% Unassigned - 5), and 'Release Summary - By Type' (20% Code Map - 1, 20% Code Set - 1, 20% Item - 2, 40% ZDL Script - 1). Below the charts is a 'Release Object Details' section with dropdowns for 'Select Status' (ALL), 'Select User' (ALL), and 'Select Type' (ALL). There are buttons for 'Add Object', 'Move Objects', and 'Promote Maps'. At the bottom is a table of release objects with columns: #, Object Name, Object Status, Type, Version, Date/Time (Live Date, Migration Date), Migration Details (From, To), Owner, Created By, Create Date, and Options. Three objects are listed: K_New_Mapping, Erwin_Map, and Sales_Codeset.

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.

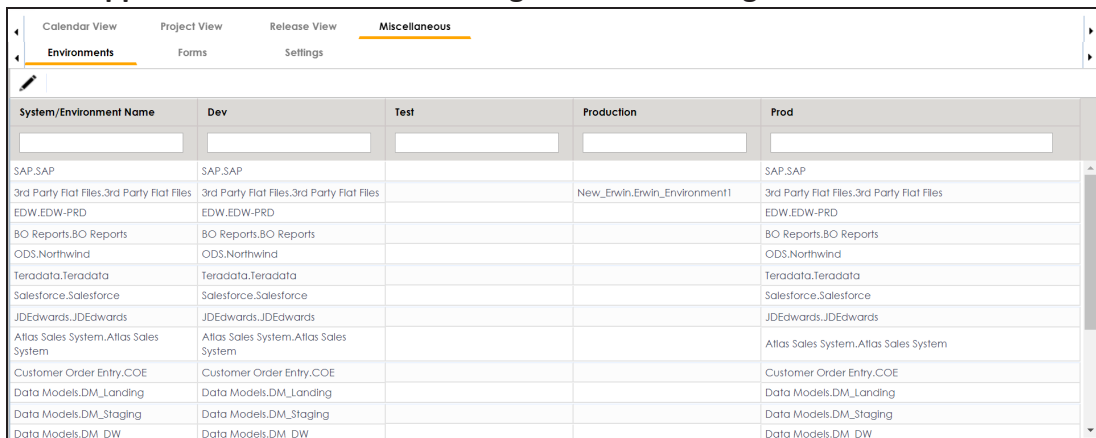
Sorting Projects and Releases

You can sort project listing in the Project View by:

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

To sort projects, follow these steps:

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



The screenshot shows the 'Miscellaneous' view in the Release Manager. The table below represents the data shown in the interface.

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

2. Click **Settings**.

The following page appears.

Sorting Projects and Releases

The screenshot shows the 'Settings' page in the 'Miscellaneous' section. It is divided into two main sections: 'Project Sorting By' and 'Release Sorting By'. Each section has a 'Sorting On' dropdown menu.

Project Sorting By:

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

Sorting On:


- Asc
- Desc

Release Sorting By:

- Release Name
- Owner
- Release Status
- Release Date
- Created Date
- Last Modified Date

Sorting On:

- Asc
- Desc

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

The project listings are sorted in the Project View.

You can sort release listings by:


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

To sort release listings, follow these steps:

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

Sorting Projects and Releases

The screenshot shows the 'Settings' page in the 'Miscellaneous' section. The page has a navigation menu at the top with 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. Below the menu, there are sub-sections: 'Environments', 'Forms', and 'Settings'. A pencil icon is visible on the left. 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.