erwin Data Intelligence

Life Cycle Management Guide

Release v15.0

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Contents

Manage Life Cycles

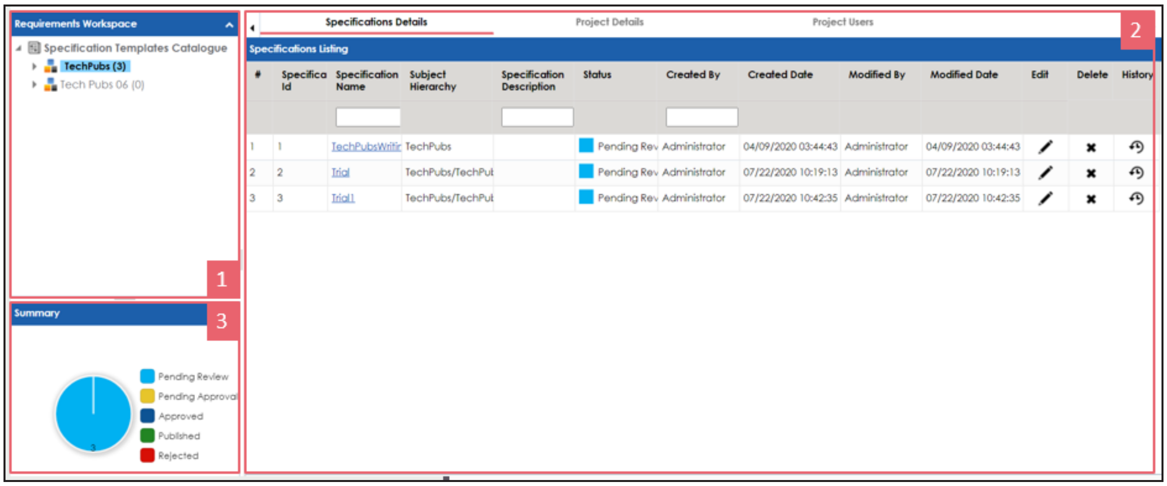
This section walks you through life cycle management in a data integration project. It involves requirements, release, and test management.

- 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.

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:

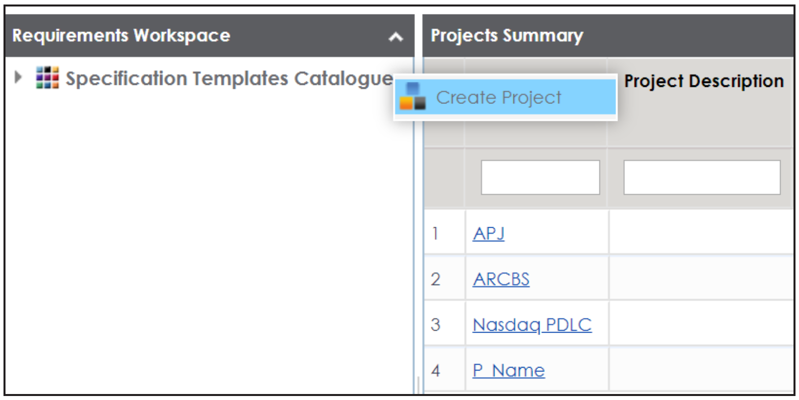
- Creating and managing projects
- Creating and managing specifications
- Linking the requirements to mappings

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.

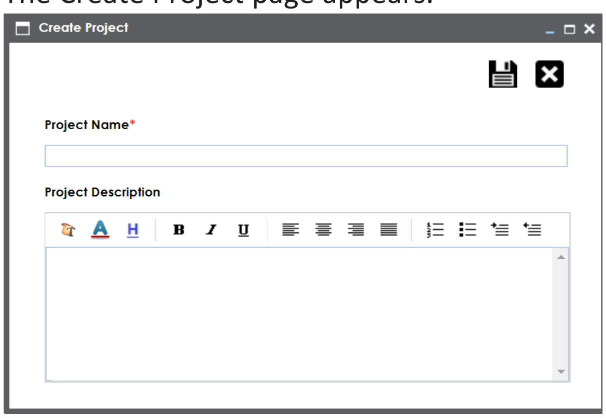
To create projects, follow these steps:

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:

- **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

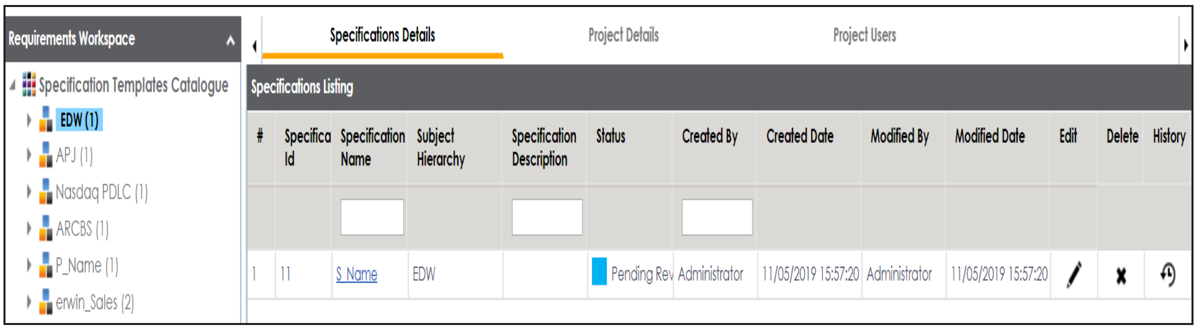
Configure Users

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.

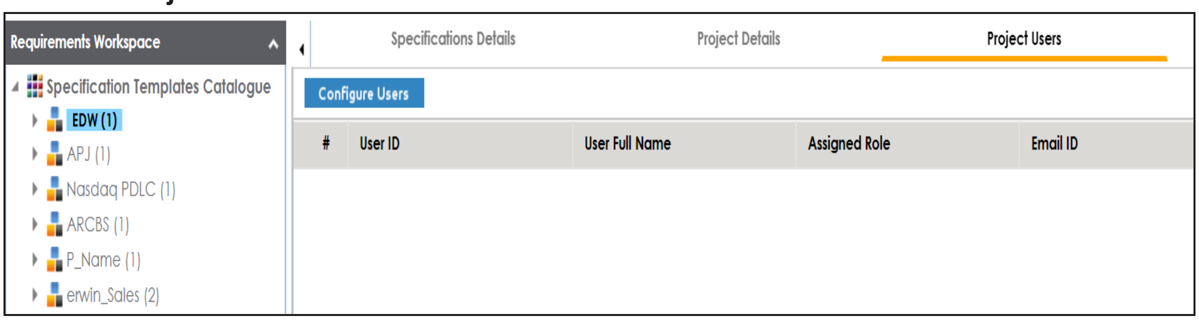
To configure users, follow these steps:

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

   The following page appears.

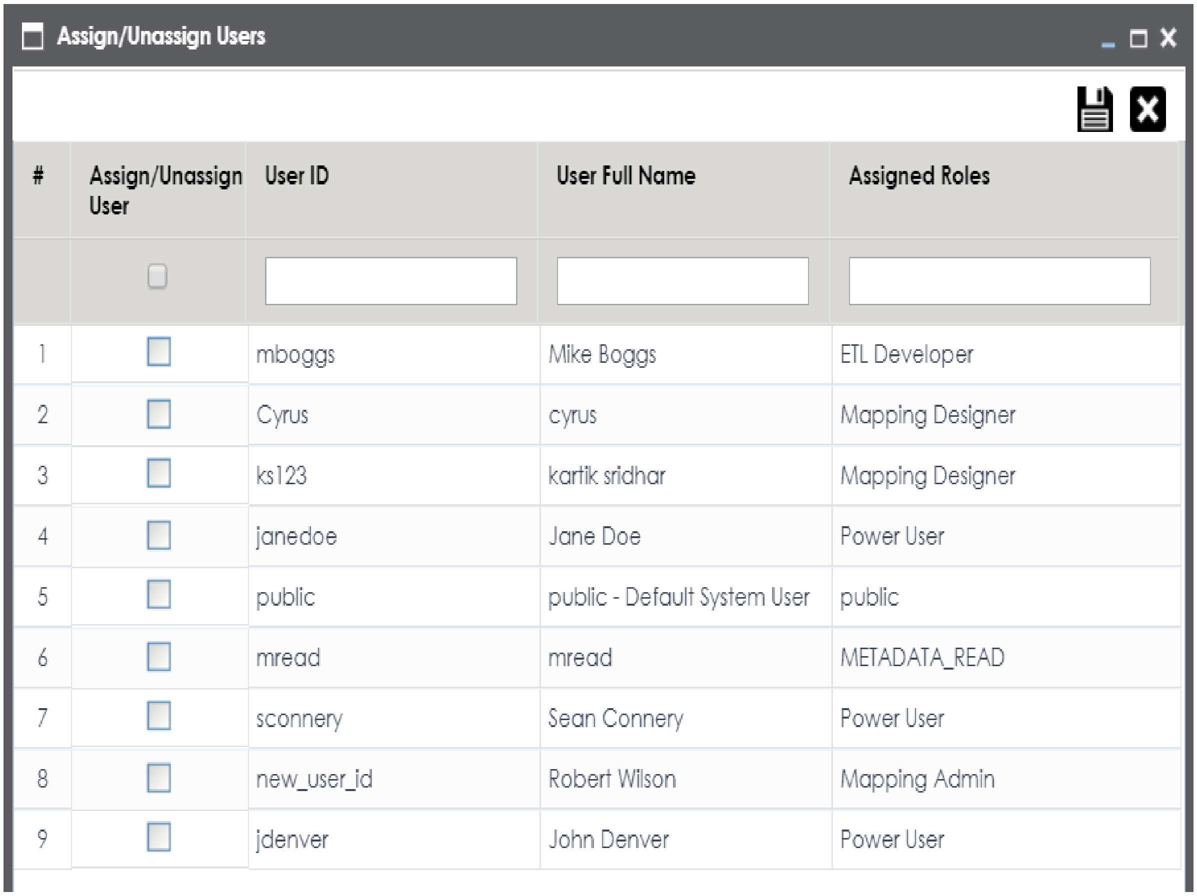


2. Click the **Project Users** tab.



3. Click **Configure Users**.

   The Assign/Unassign Users page appears.



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

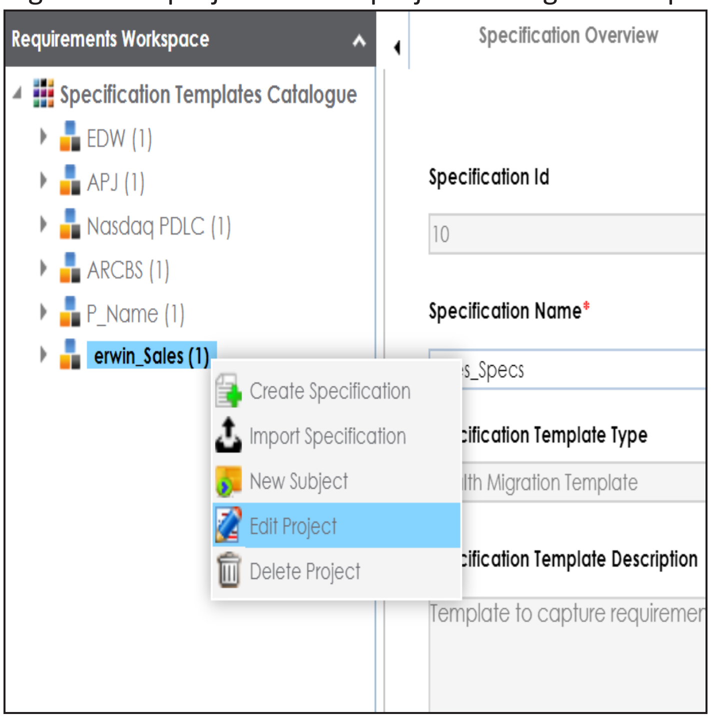
Managing Projects

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

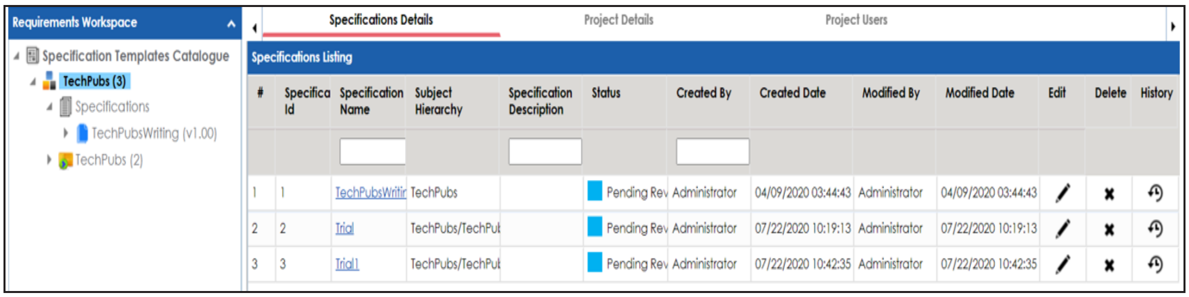
Use this option to update project name and its description. Alternatively, you can follow these steps:

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

Delete Project

Use this option to delete the project.

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



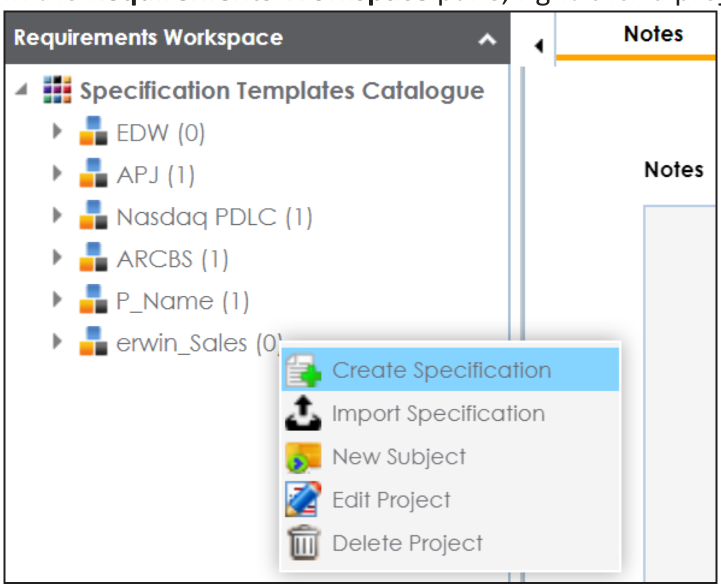
Creating Specifications

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

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

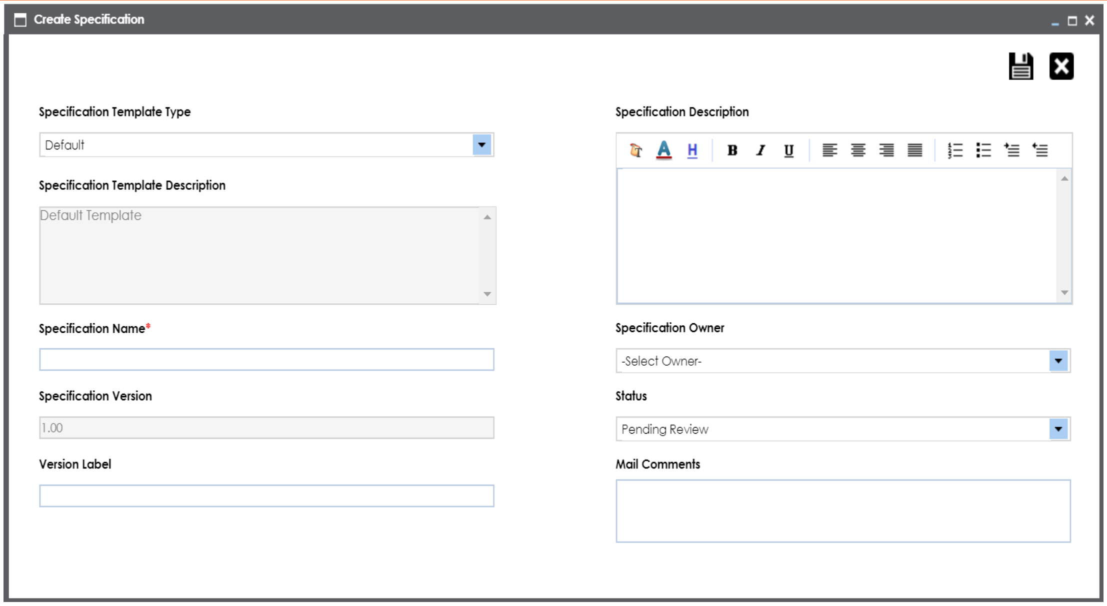
To create specifications, follow these steps:

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



3. Click **Create Specification**.

   The Create Specification page appears.



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.

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 specificationsinvolves:

- Editing specifications
- Creating specification version

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

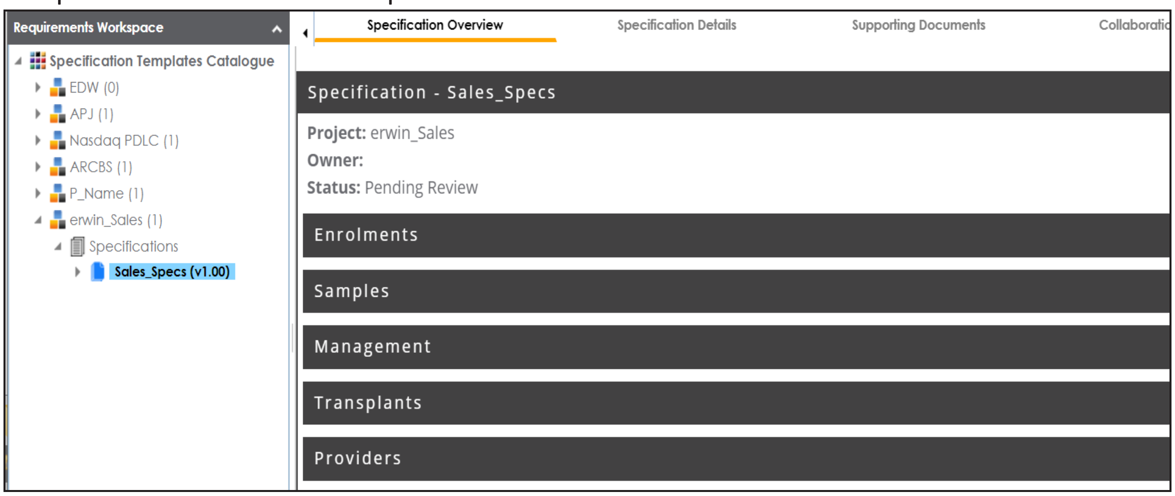
Documenting Requirements

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

To document requirements, follow these steps:

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

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



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 Artifactstopic.

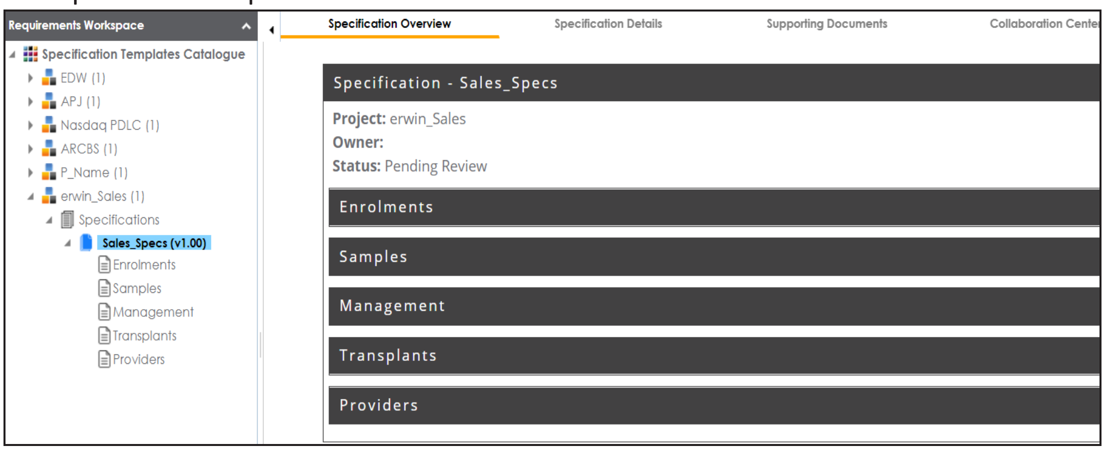
Adding Supporting Documents

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:

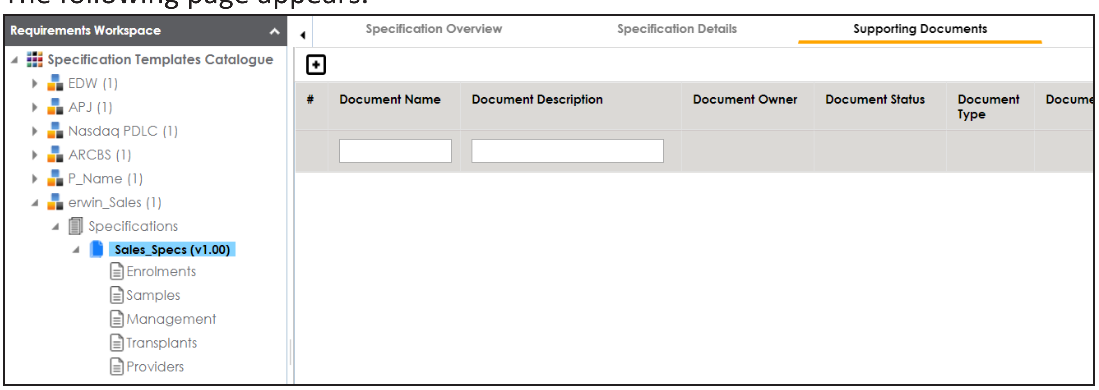
1. In the **Requirements Workspace** pane, select a specification.

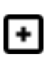
   The specification opens in a detailed view.



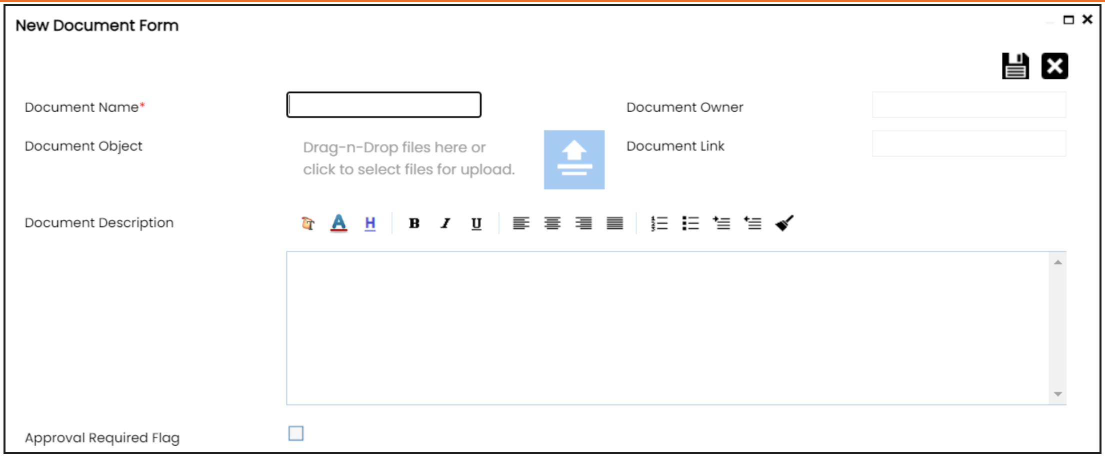
2. Click the **Supporting Documents** tab.

   The following page appears.



3. Click .

   The New Document Form page appears.



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/l/2sC2_SZIyeFKI7OOn-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.

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 you requirement. By default, you can create to-do tasks, access requests, or issues. Apart from these task types, you can configure custom task types via Task Type Configuration.

To add tasks, follow these steps:

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

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

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:

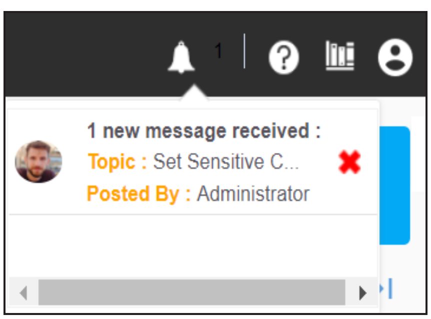
Assigned

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.



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

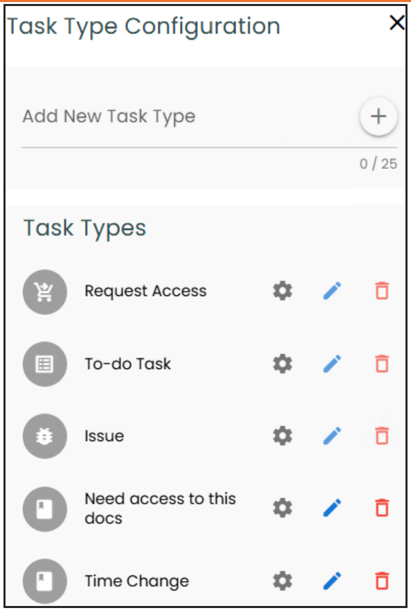
Configuring Task Types

You can 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. Additionally, you can create custom task types depending on your requirements.

To add custom task types, follow these steps:

1. In the utility section, click .

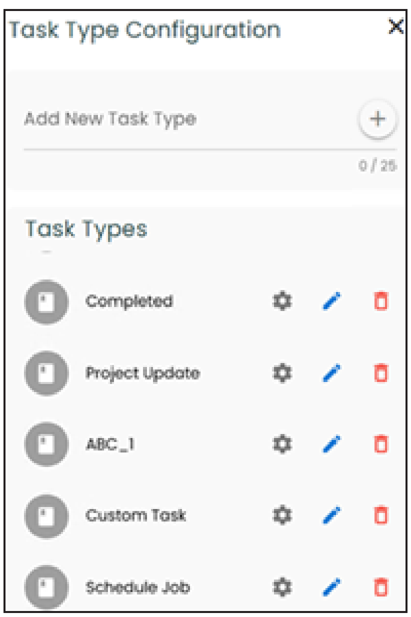
   The Task Type Configuration pane appears and displays a list of available task types.



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

Configure Task Type ( )

Use this option to configure task types.

Edit ( )

Use this option to edit task types.

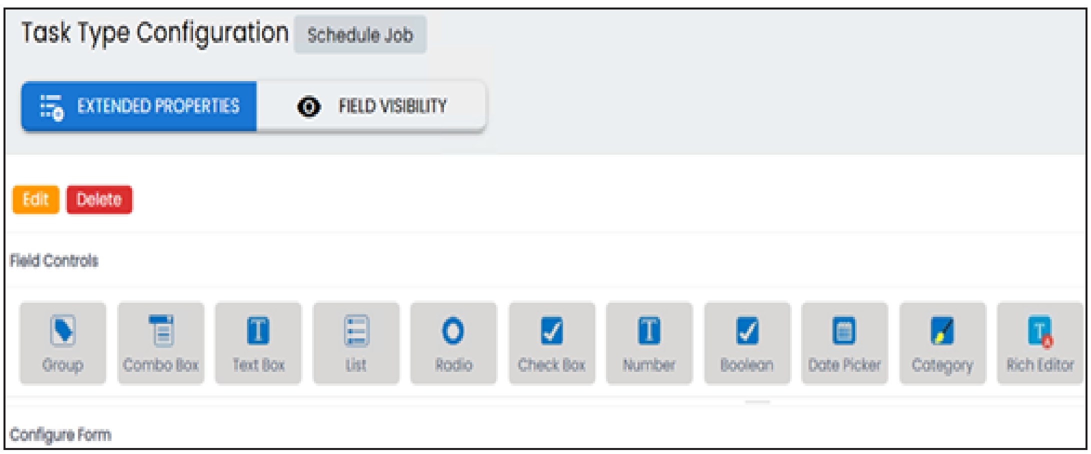
Delete ( )

Use this option to delete task types.

To configure task types, follow these steps:

1. Click .

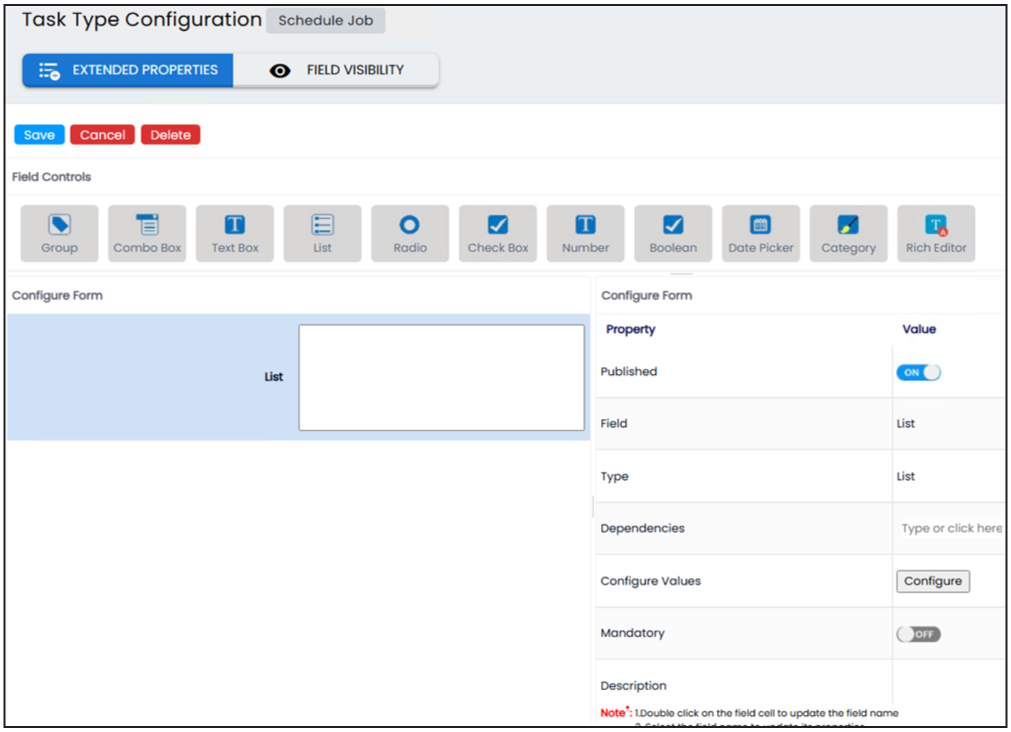
   The Task Type Configuration page appears. By default, the Extended Properties tab opens.



   The Extended Properties tab contains the following sections:

   - **Field Controls**: This pane displays the available UI elements.
   - **Configure Form**: Use this pane to design forms using the UI elements available in the Field Controls pane.
   - **Configure Form**: Use this pane to view and edit the properties of the UI element selected in the Configure Form pane.

2. Click **Edit**.
3. Double-click or drag and drop the required UI elements from the Field Controls pane to the Configure Form pane.
4. Select the required UI element one at a time and edit their properties in the Properties pane.



The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description
Published	Switch the **Published** option to ON to publish the field.
Field	Specifies the field label. To change the field labels, double-click the corresponding Value cell. For example, List.
Type	Specifies the type of the field.

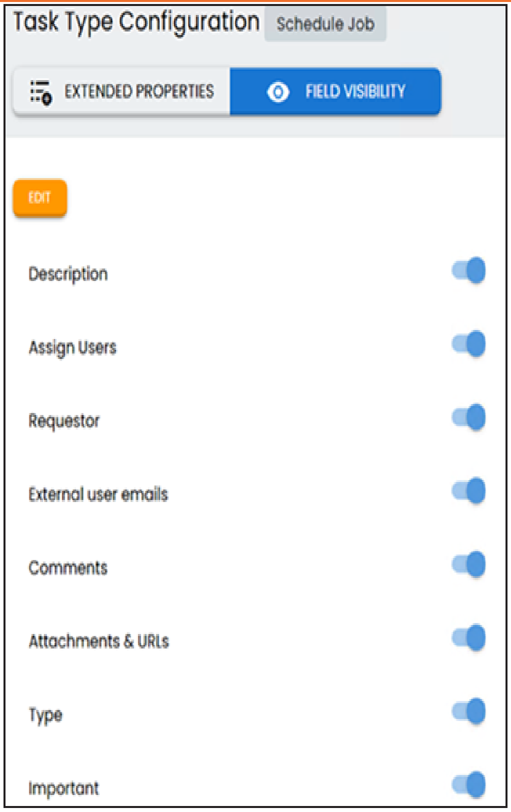
Property	Description
	To select field types, double-click the corresponding Value cell. For example, List.
Dependencies	Defines the pick list fields that can be used as controlling fields. It works only with the Reference Data Manager connector. To define pick list fields, select the fields from the drop down list.
Configure Values	Specifies the connectors for the field. To enter option values, click **Configure**. Use the following options: ▪ Default Connector: Use this option to enter option values manually or using an MS Excel file. ▪ Reference Data Manager: Use this option to pull option values from reference tables in the Reference Data Manager.
Mandatory	Specifies whether the field is mandatory. Switch the **Mandatory** option to ON to make this field mandatory in a form.
Description	Specifies the field description. To enter field descriptions, double-click the corresponding Value cell.
Order	Specifies the order of the field on the Extended Properties tab. To enter the order number, double-click the corresponding Value cell. You can also drag and move fields in the Configure Form pane to change their order.

3. Click **Save**.

   The form is saved and available on the Extended Properties tab.

   To configure field visibility, follow these steps:

   1. Click the **Field Visibility** tab. It displays the default fields available for the task type.



2. Click **Edit**.
3. To make fields visible, switch on the required fields.
4. Click **Save**.

   The fields are configured.

Default Connector

When you configure extended properties using UI elements, such as combo box, radio button, and list, you also need to configure their option values. You can use the default connector to import option values from an MS Excel file or enter them manually.

To configure option values using the default connector, follow these steps:

1. In the **Configure Form** section, click the required UI element.

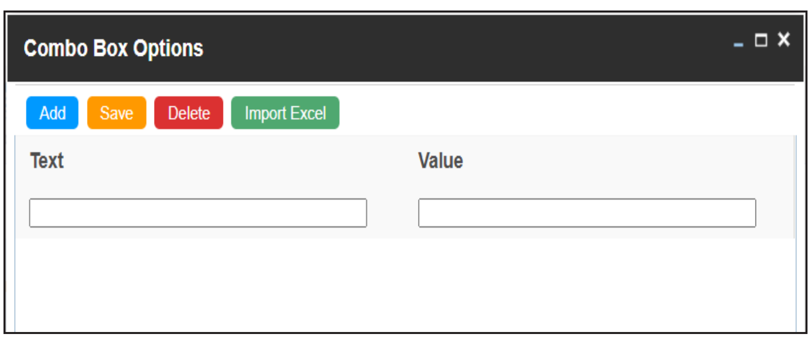
   Ensure that you are in edit mode.

2. In the **Properties** section, click **Configure**.

   The Connectors page appears.

3. On the **Connectors** page, ensure that the Default Connector option is selected. Then, click **Next**.

   The <UI_Element> Options page appears. For example, if the UI element is Combo Box, the Combo Box Options page appears.



4. Use the following options:

   Add

   Use this option to enter text and value manually.

   Import Excel

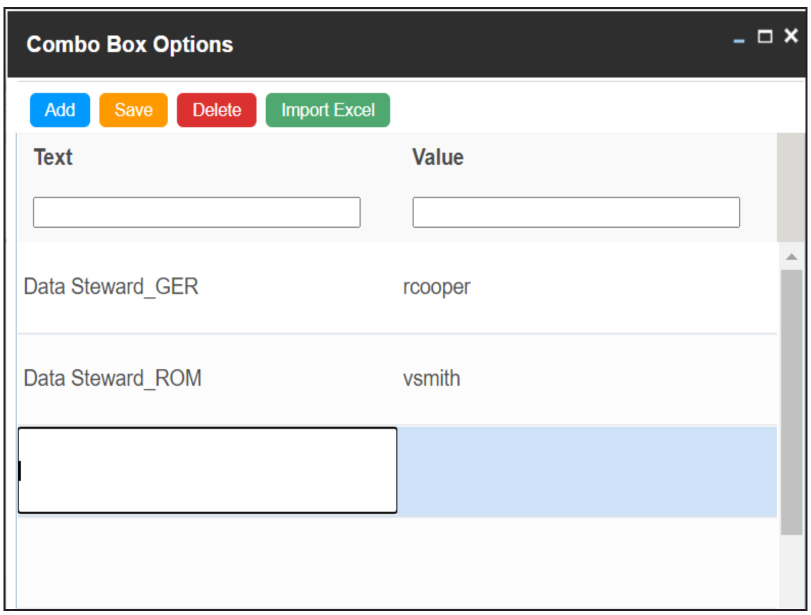
   Use this option to import options from MS Excel files.

5. After configuring option values, click **Save**.

To add option values manually, follow these steps:

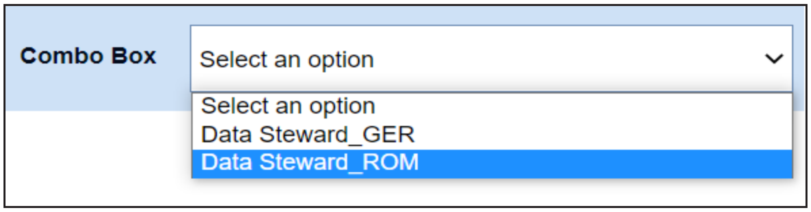
1. Click **Add**.
2. Enter values in the Text and Value fields.

   The Text corresponds to options whereas the Value corresponds to underlying value of an option. You can add as many values as needed.

3. Click **Save**.

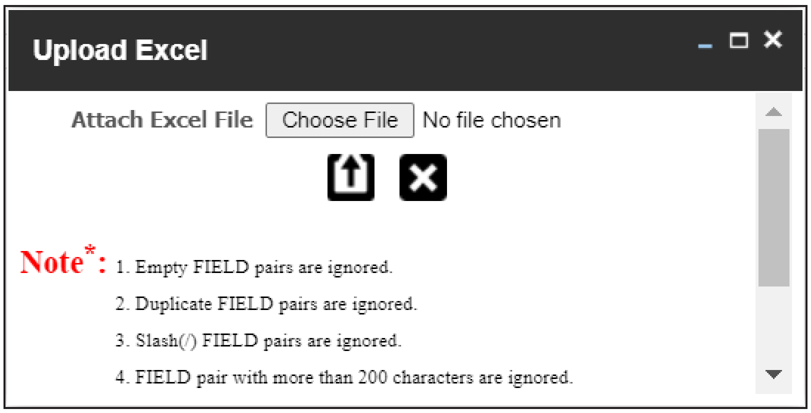
The option values appear in the UI element under the Configure Form section.



To import option values from MS Excel files, follow these steps:

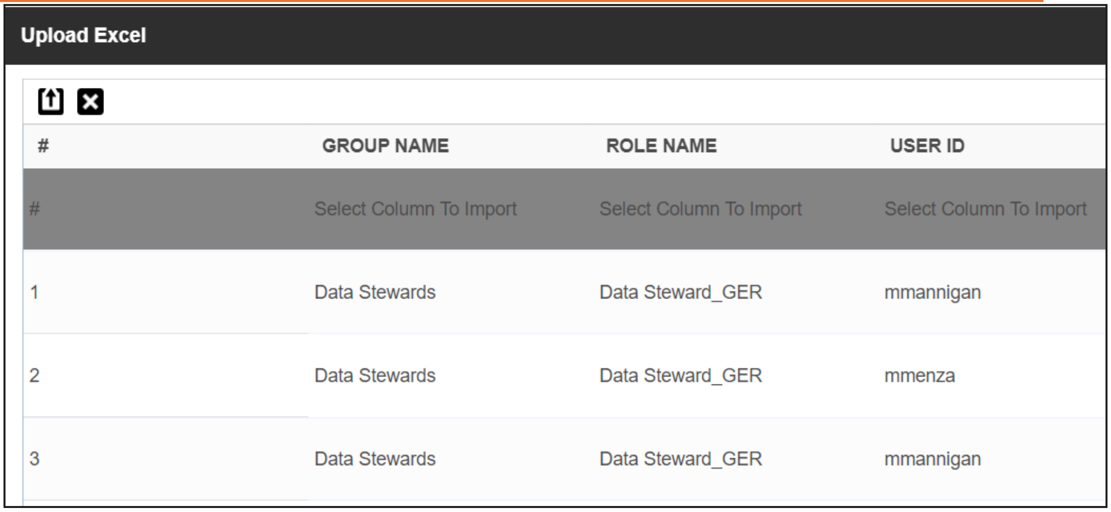
1. Click **Import Excel**.

   The Upload Excel page appears.



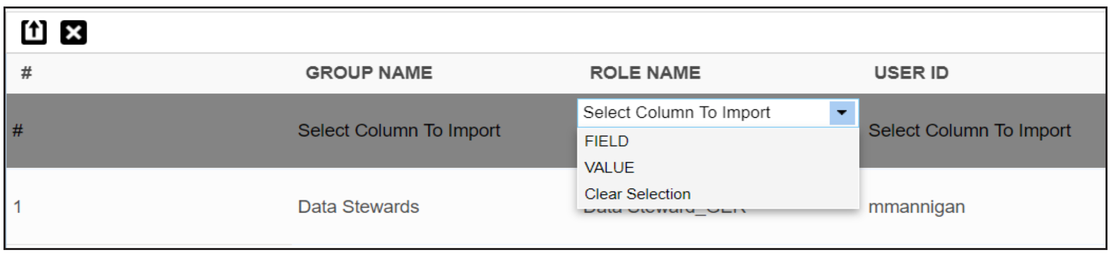
2. Click **Choose File** and select the required MS Excel file.

   The Upload Excel page appears. It displays the data in the MS Excel file.



3. Double-click the **Select Column To Import** cell in the required column.

   The available options appear.

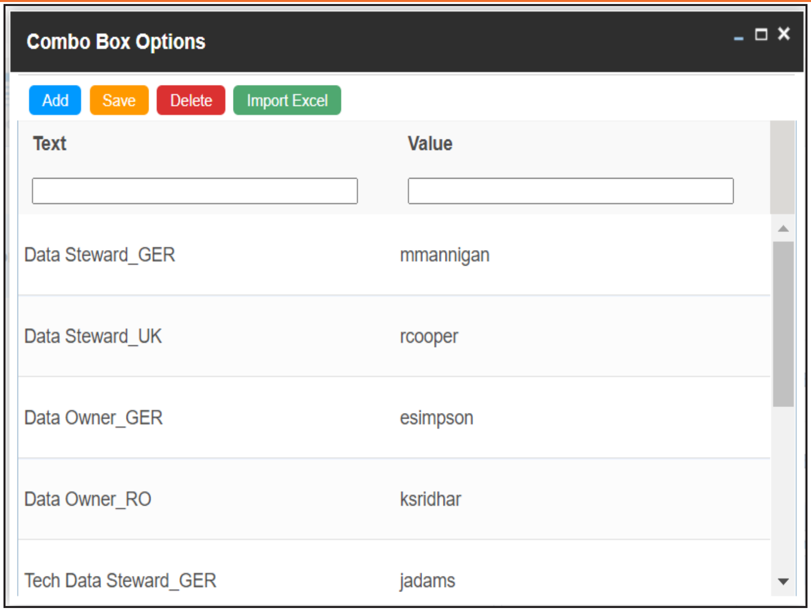


4. Select the appropriate option.

   Field corresponds to options and Value corresponds to value of an option. You can import multiple columns. Use Clear Selection to undo the selection.

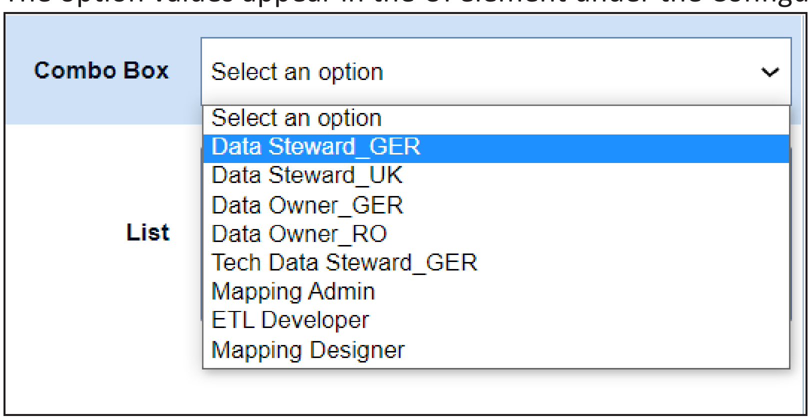
5. Click .

   The <UI_Element> Options page appears. It displays the imported columns. You can delete a row that is not required. To delete rows, click a row and then click **Delete**.



6. Click **Save**.

   The option values appear in the UI element under the Configure Form section.



Reference Data Manager

When you configure extended properties using UI elements, such as combo box, radio button, and list, you also need to configure their option values. You can use the Reference Data Manager connector to import option values from tables in the Reference Data Manager.

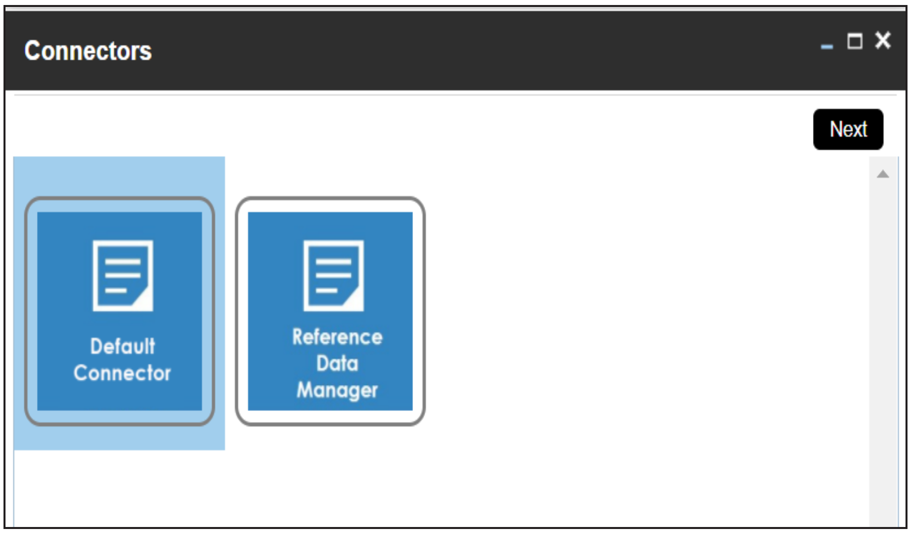
To configure option values using reference data manager connector, follow these steps:

1. In the **Configure Form** section, click the required UI element.

   Ensure that you are in edit mode.

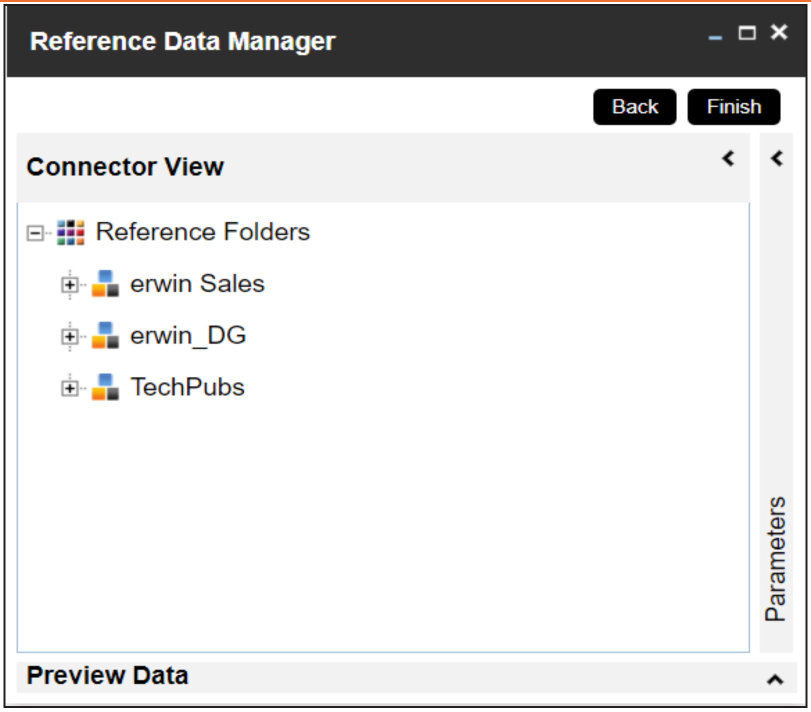
2. In the **Properties** section, click **Configure**.

   The Connectors page appears.

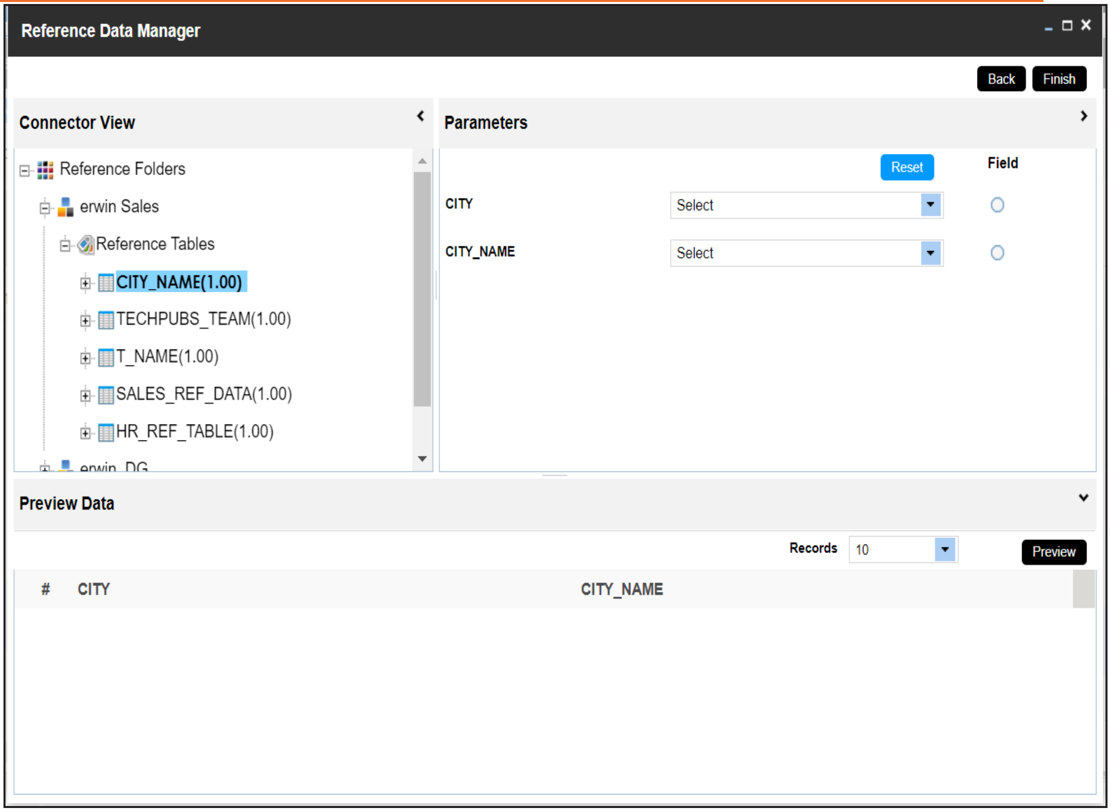
3. On the **Connectors** page, click **Reference Data Manager** and then click **Next**.

   The Reference Data Manager page appears. It displays the reference folders in the Connector View pane.



4. In the **Connector View** pane, expand a reference folder and select a reference table.

   The Parameters pane displays the columns in the reference table. You can also click Preview to view the data in the reference table.

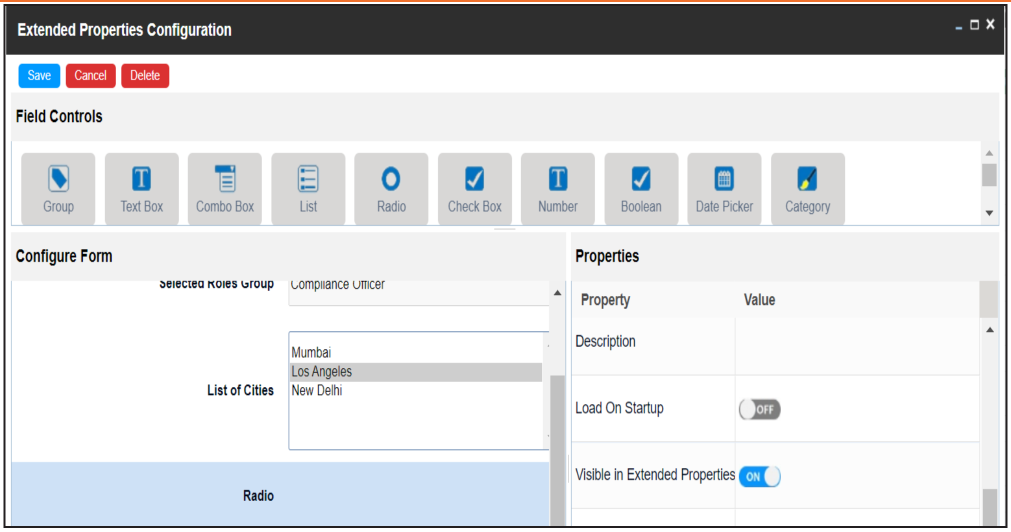


5. In the **Parameters** pane, click the radio button next to the required column.

   You can select the controlling field from the drop down option. Ensure that you define the required dependencies in the Properties pane and that the option values for controlling field are configured using the same reference column.

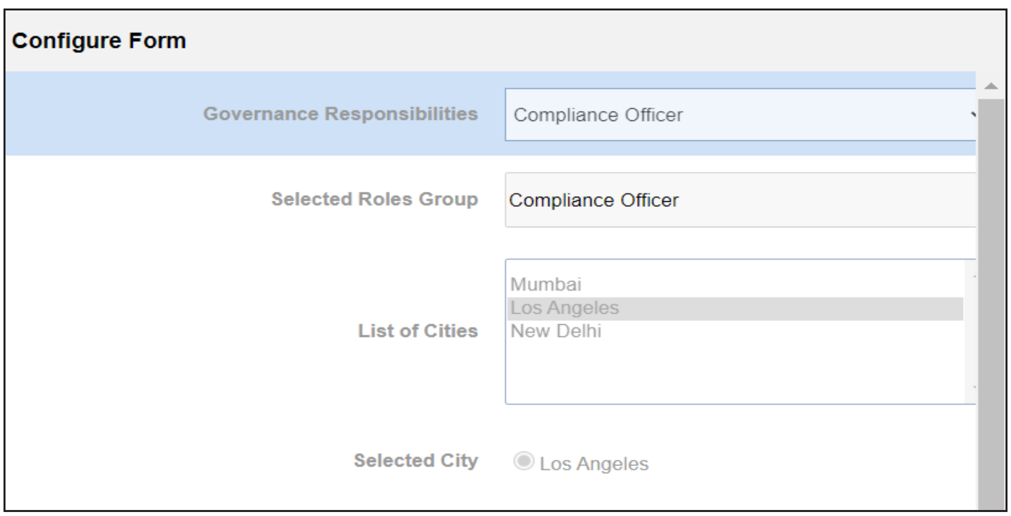
6. Click **Finish**.

   The Extended Properties Configuration page appears.



7. Under the **Properties** section, switch **Load on Startup** to **ON**.
8. Click **Save**.

   The option values are configured. For example, in the following form the List of Cities is the controlling field for Selected City. Both the fields get their option values from the same reference column.



Managing Tasks

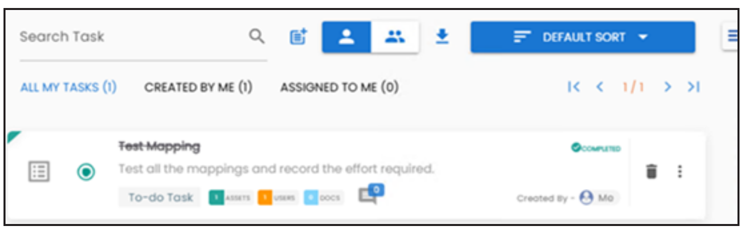
Managing tasks involves:

- 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.

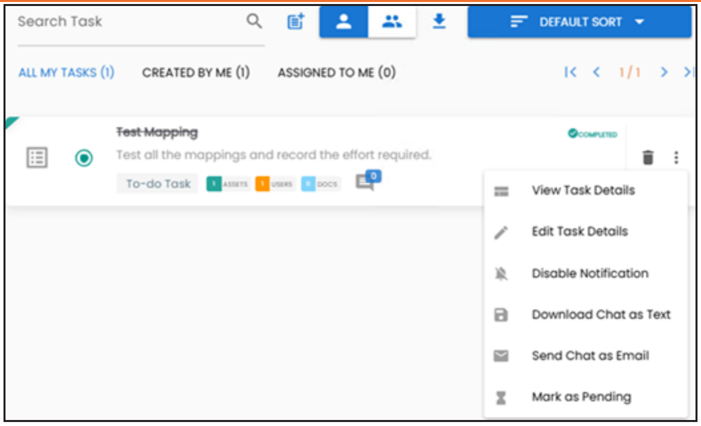
For example, in the following image, the task, Test Mapping is marked complete.



To further manage tasks, follow these steps:

1. On a task tile, click ⋮.

   The available options appear.



2. Use the following options to work on tasks:

View Task Details

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

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

Edit Task Details

Use this option to update task details.

Disable Notification

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

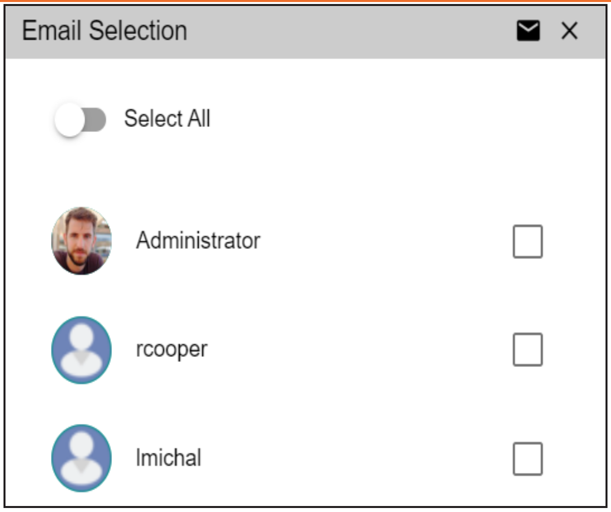
Download Chat as Text

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

Send Chat as Email

Use this option to share the chat related to a task via an email. Click **Send Chat as Email**.

The Email Selection page appears. It displays a list of users assigned to the task.



Select the required users, and then click . An email is sent to the selected users.

Mark as Pending

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

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

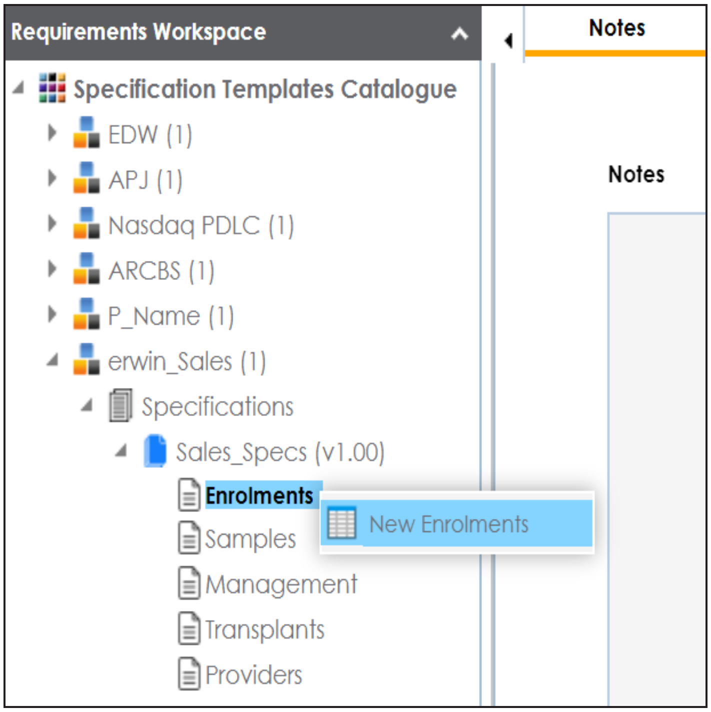
> You can delete a task only if you have created it.

Creating Child Artifacts

To create better structured specifications and to enrich them further, you can create multiple child artifacts under an artifact.

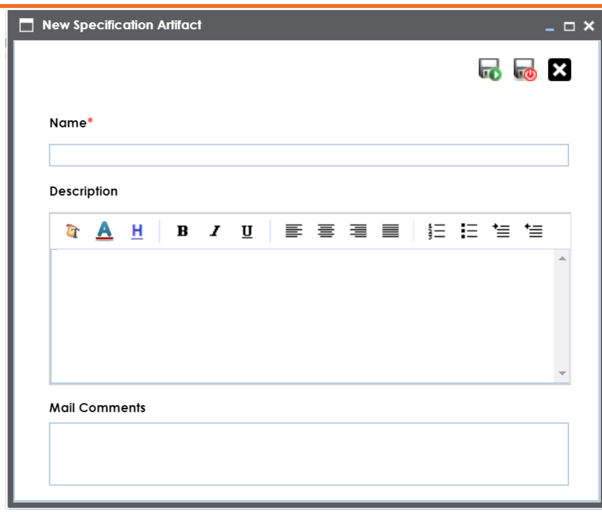
To create child artifacts, follow these steps:

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



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

   The New Specification Artifact page appears.



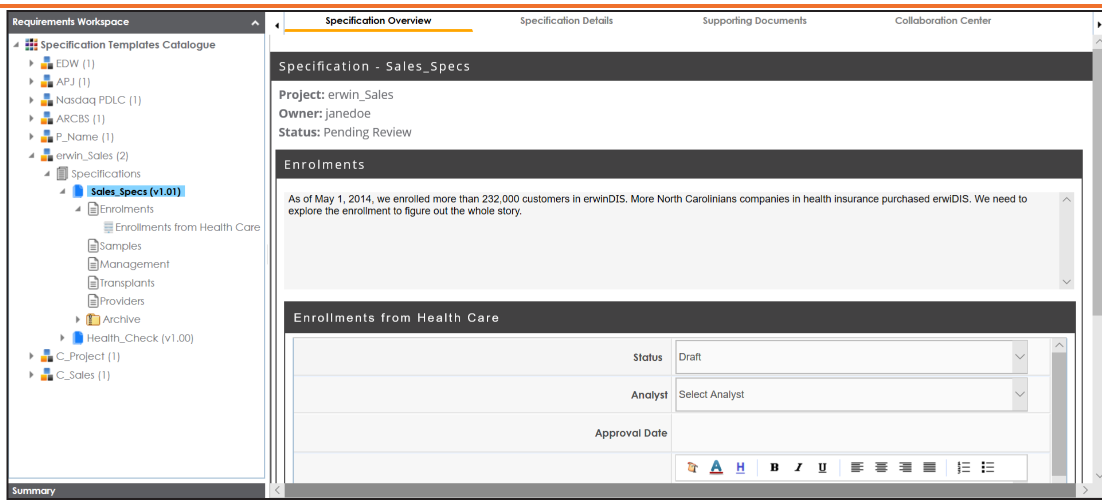
3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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

4. Click .

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

Creating Child Artifacts



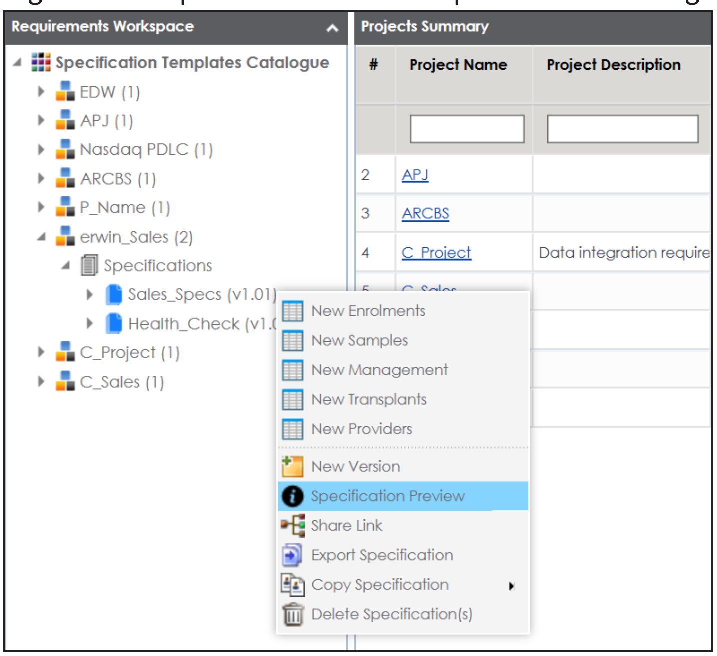
Managing Specifications

You can preview the specifications and manage them. Managing specifications involves:

- Editing specifications
- Creating specification version
- Sharing specification link
- Exporting and importing specifications
- Copying specifications
- Deleting specifications

To manage specifications, follow these steps:

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



2. Use the following options:

   New Version

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

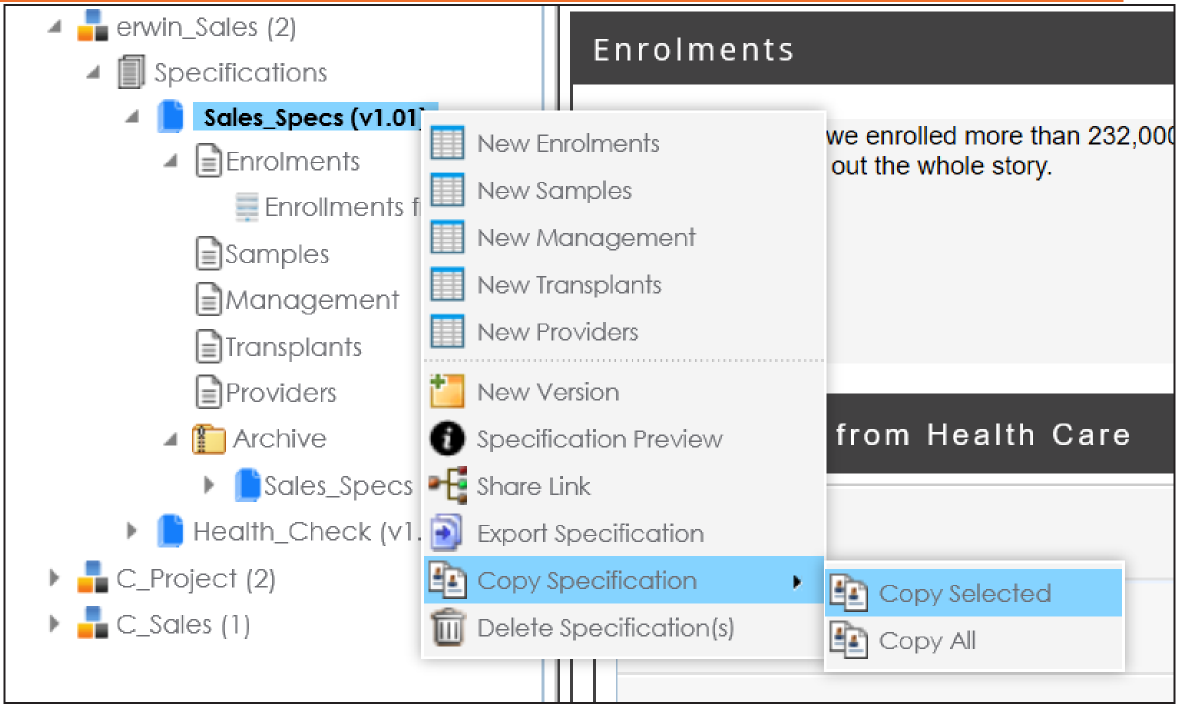
Use this option to generate a shareable specification URL. You can copy the URL to share or send the URL through an email using an email client.

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

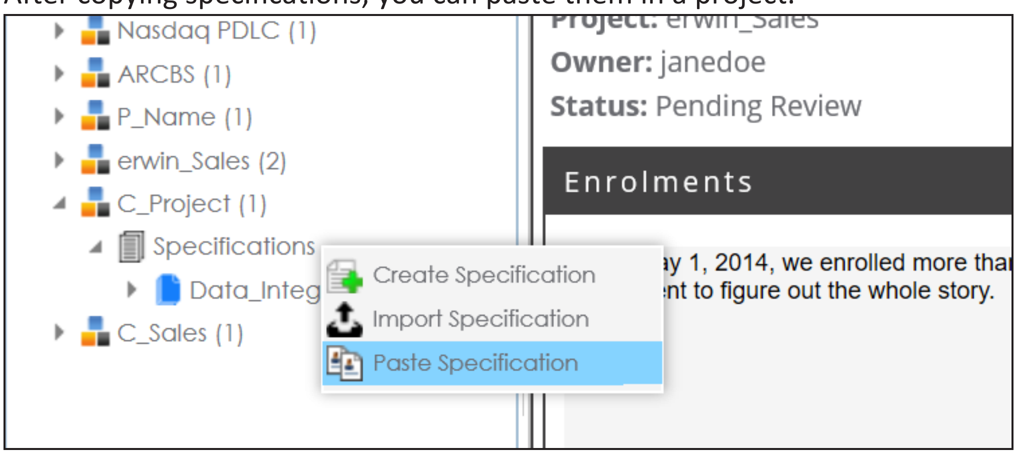
Use this option to copy specifications.



Use one of the following options:

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

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



Delete Specification

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

Edit Specifications

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

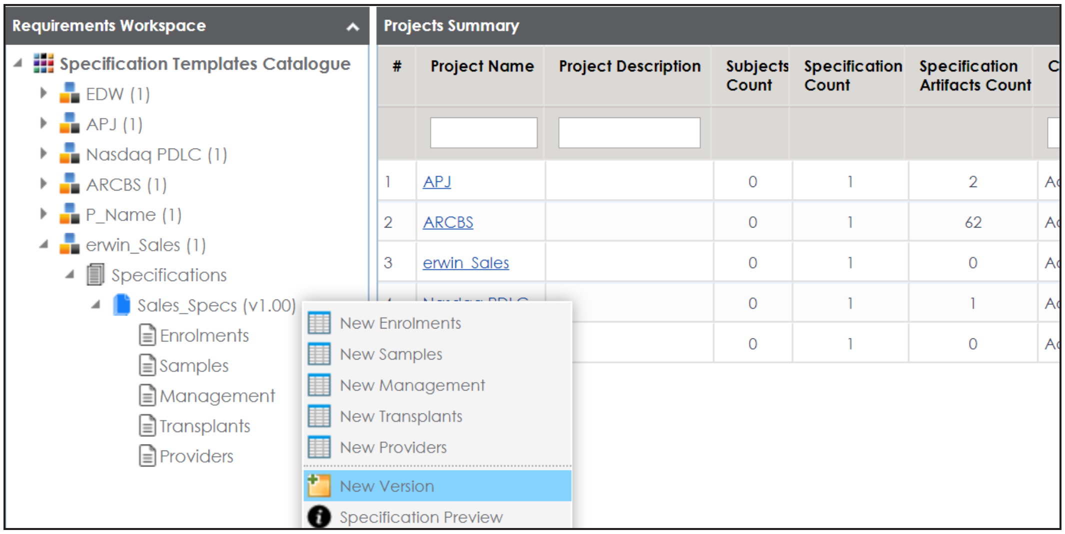
1. Click the **Specifications** node.
   The specification Listing pager appears.
2. Click .
   The Specification Details page appears in edit mode.
3. Update the required fields and click .
   The specification is updated.

Creating Specification Versions

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

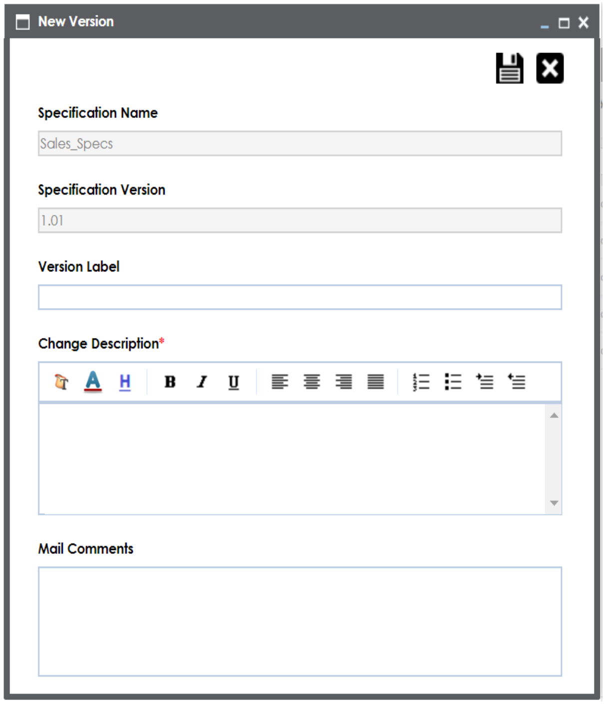
To create specification versions, follow these steps:

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



2. Click **New Version**.

   The New Version page appears.



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

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.

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.

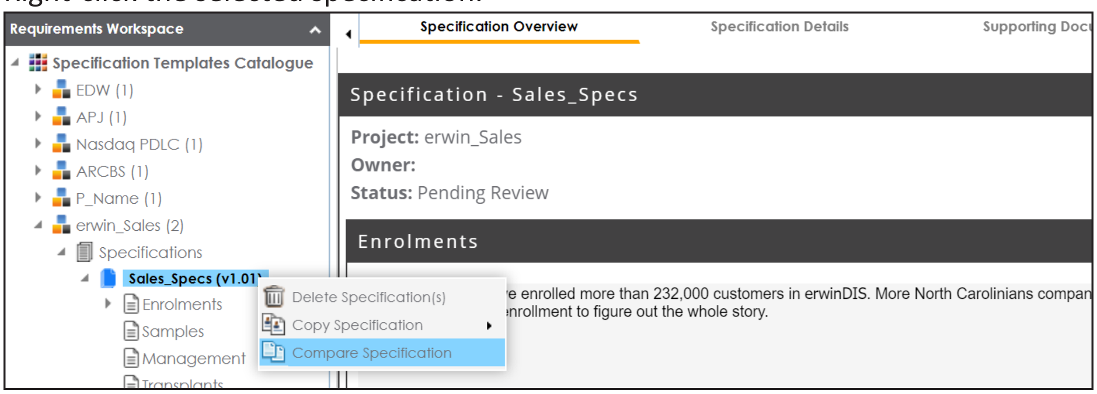
4. Click .

   A version of the specification is created and added to the Specifications tree.

   The older specification version is archived and cannot be edited.

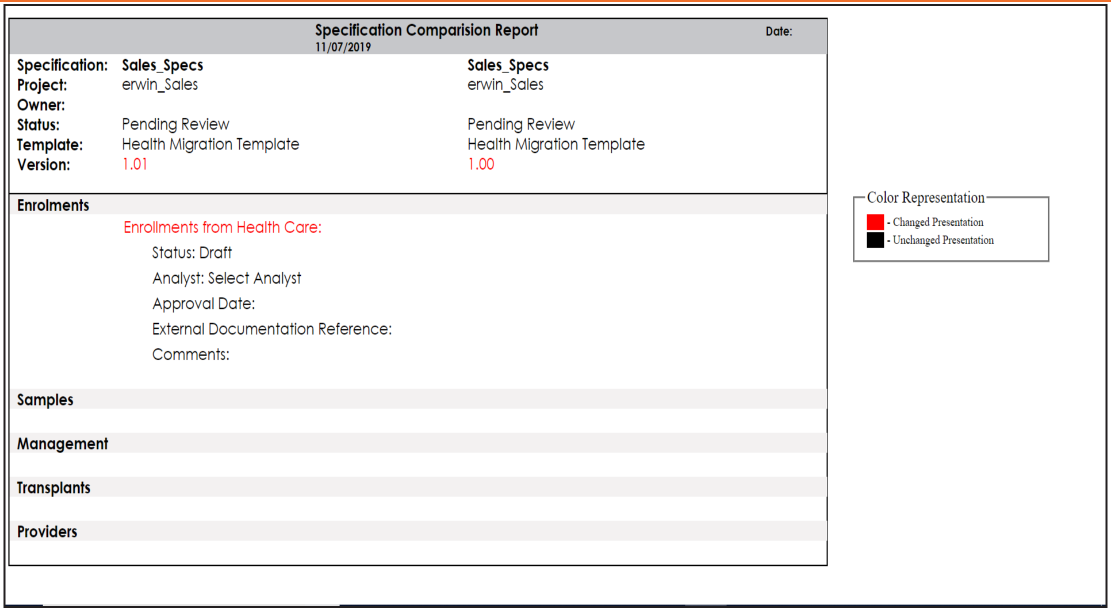
To compare the two versions of a specification, follow these steps:

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.



Specification Comparision Report Date:
11/07/2019

Specification:	**Sales_Specs**	**Sales_Specs**
Project:	erwin_Sales	erwin_Sales
Owner:		
Status:	Pending Review	Pending Review
Template:	Health Migration Template	Health Migration Template
Version:	1.01	1.00

Enrolments

Enrollments from Health Care:

Status: Draft

Analyst: Select Analyst

Approval Date:

External Documentation Reference:

Comments:

Samples

Management

Transplants

Providers

Color Representation

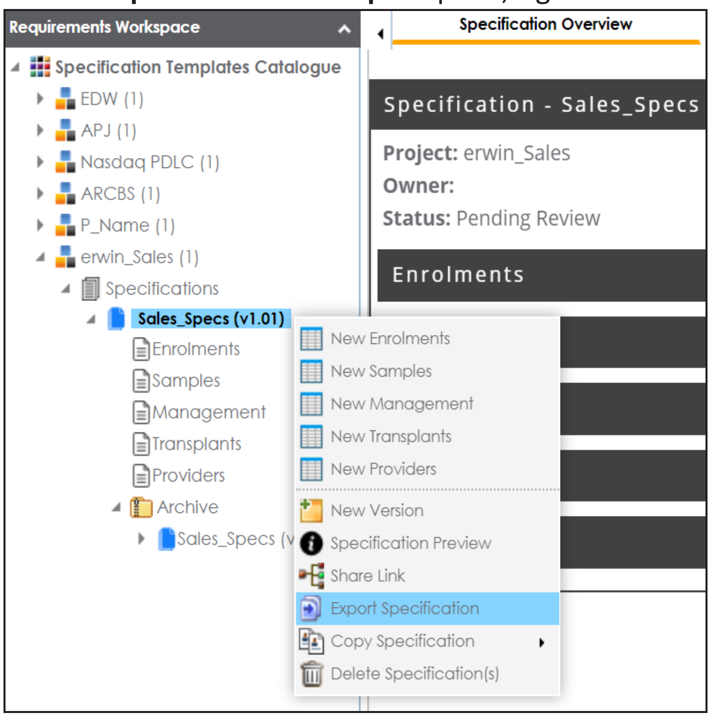
- Changed Presentation
- Unchanged Presentation

Exporting and Importing Specifications

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

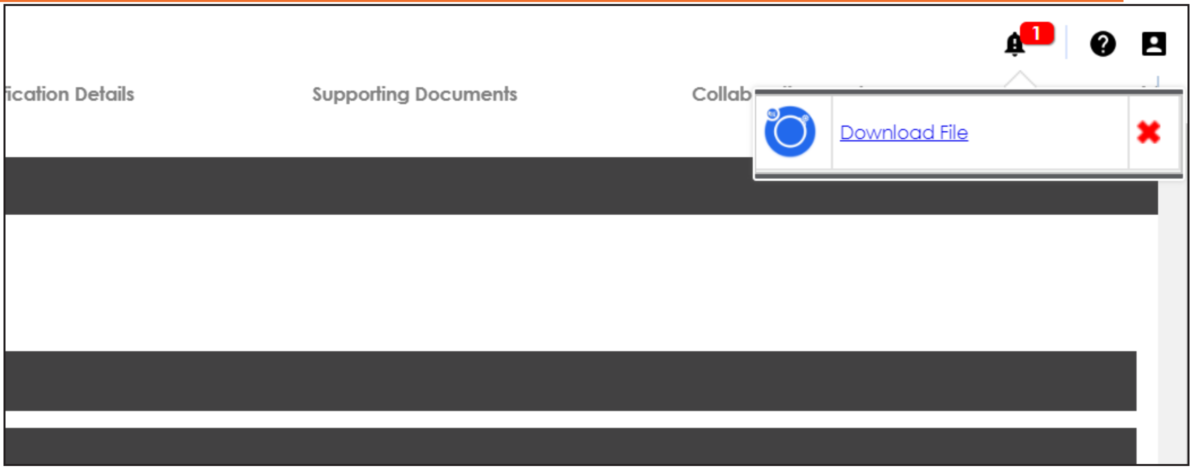
To export specifications, follow these steps:

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



2. Click **Export Specification**.

   The Download File hyperlink appears in the notification area.



3. Click **Download File**.

   The specification is downloaded as a .zip file.

You can create a specification by importing the exported specification.

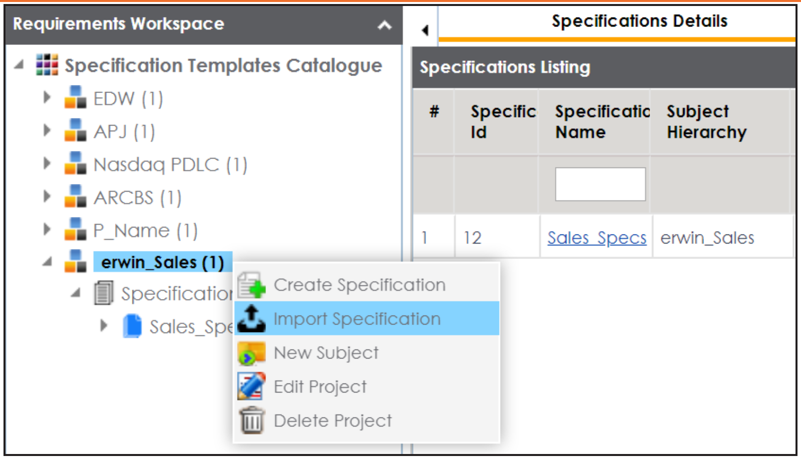
To import a specification, follow these steps:

1. Unzip the exported specification.

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

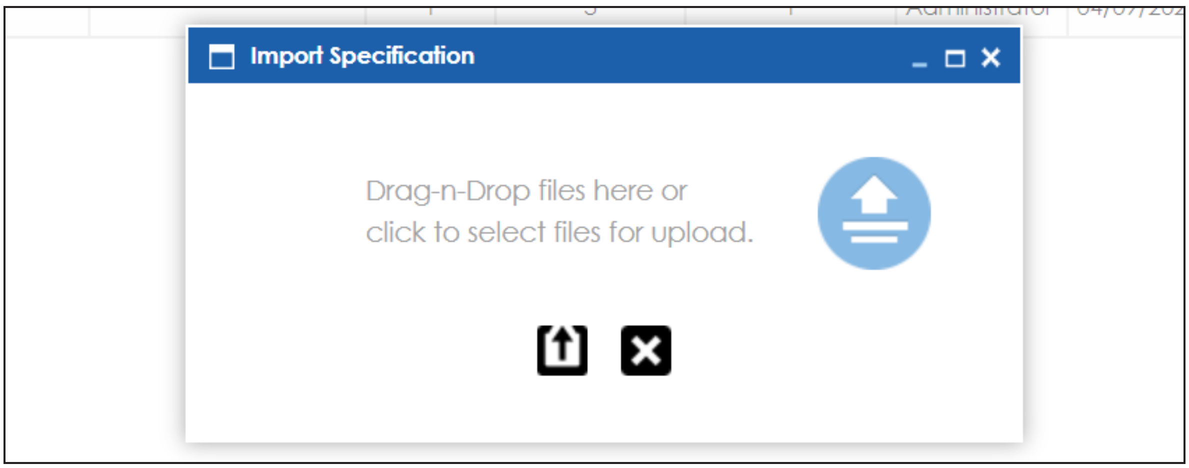
   > If you are importing the specification to the same project, then change the Specification Name and the Template Name in the .xml file. If you are importing the specification to a different project, you can import the .xml file as it is.

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



4. Click **Import Specification**.

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



6. Click .

   The specification is created and added to the Specifications tree.

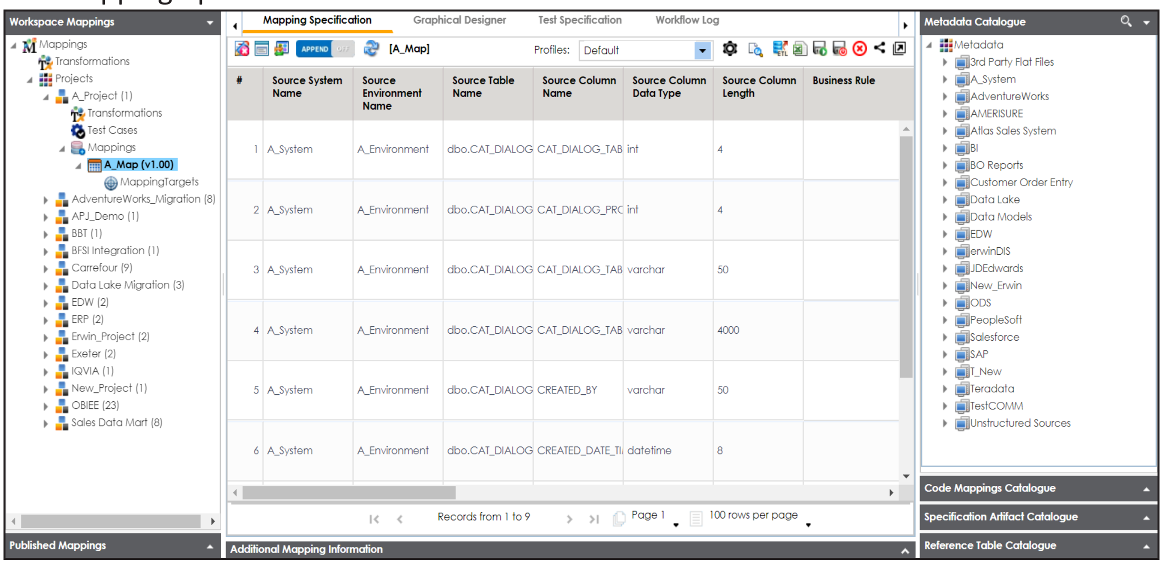
Linking Requirements to Data Mappings

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

To link functional requirements to mappings, follow these steps:

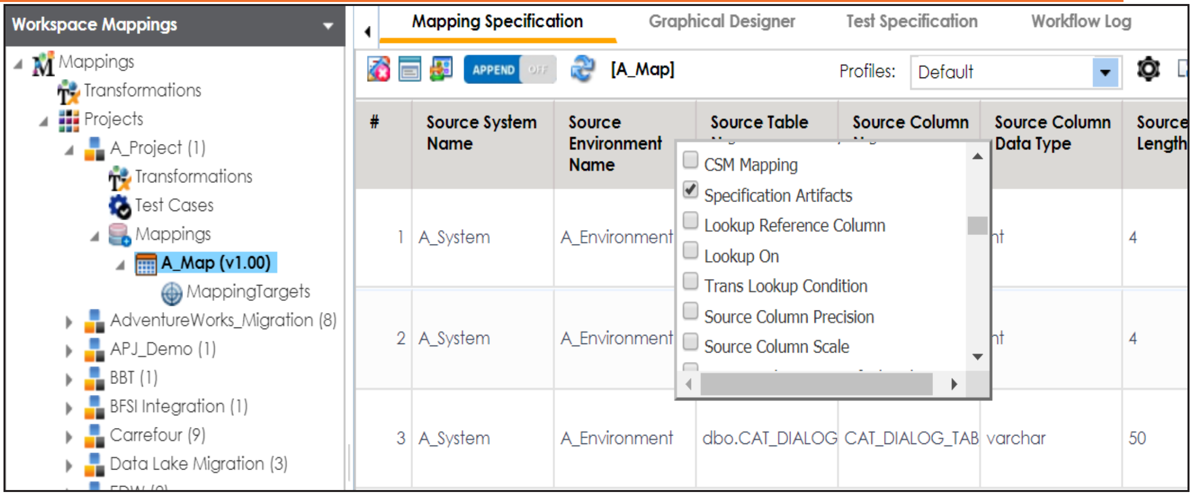
1. Go to **Application Menu** > **Data Catalog** > **Mapping Manager**.
2. Click a mapping.

   The mapping opens in the detailed view.

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

   A list of header columns appears.



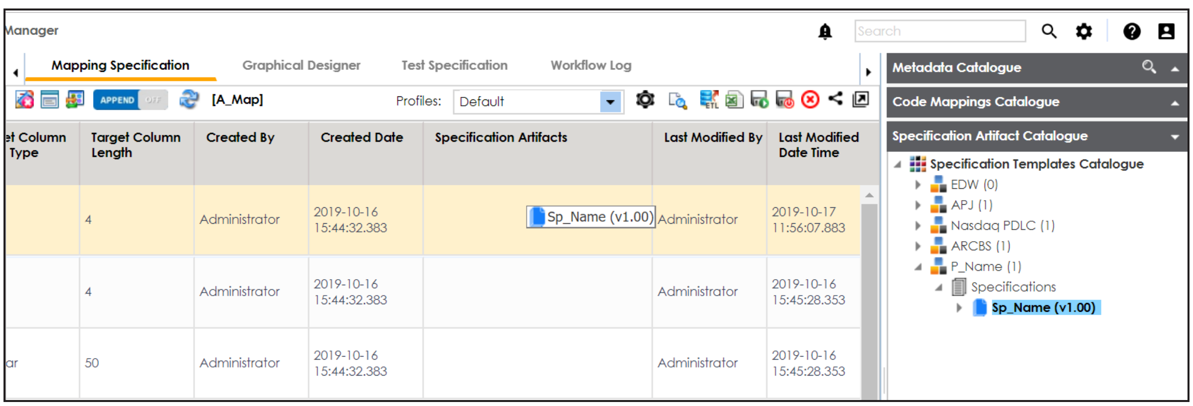
4. Scroll down the list and select the **Specification Artifact** check box.

   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 .

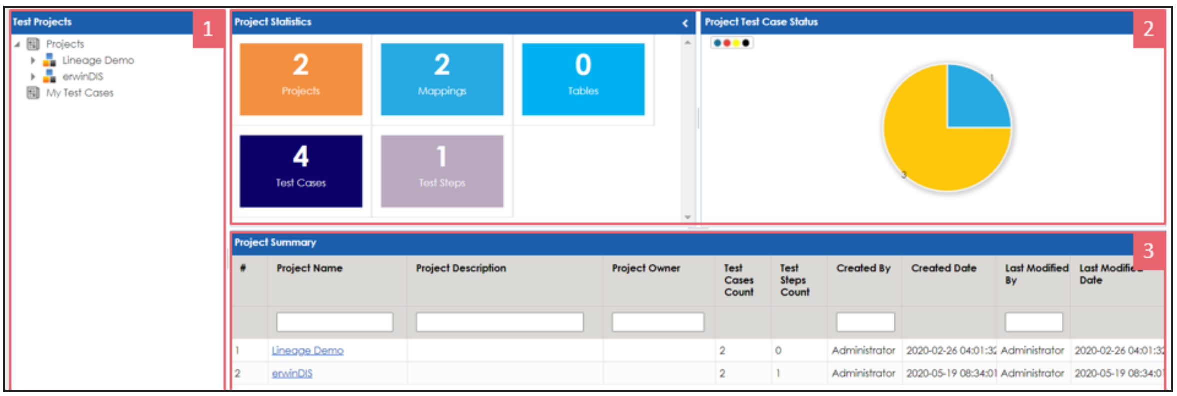
   Requirements are linked to the selected mapping.

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:

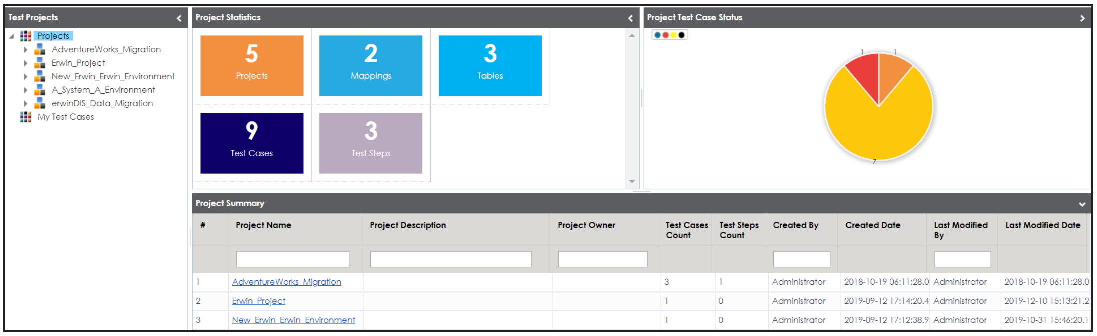
- Creating and Managing Test Cases for Mappings
- Creating and Managing Test Cases for Tables

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:

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

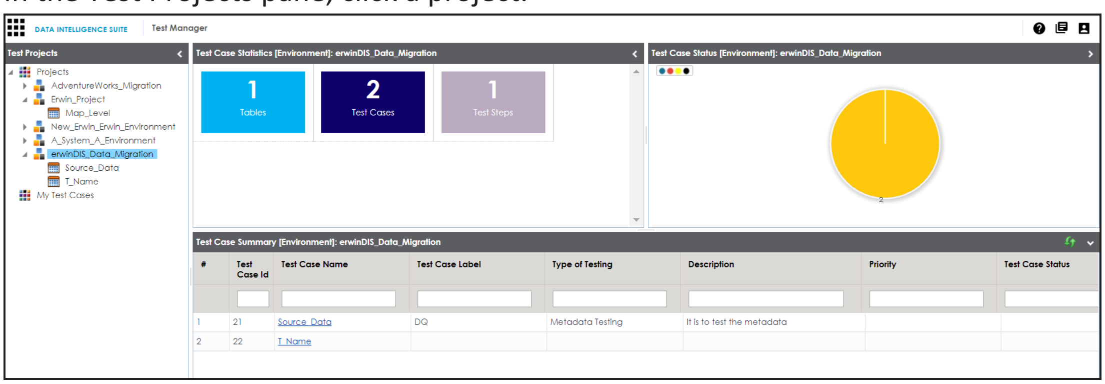
Project Summary

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

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

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

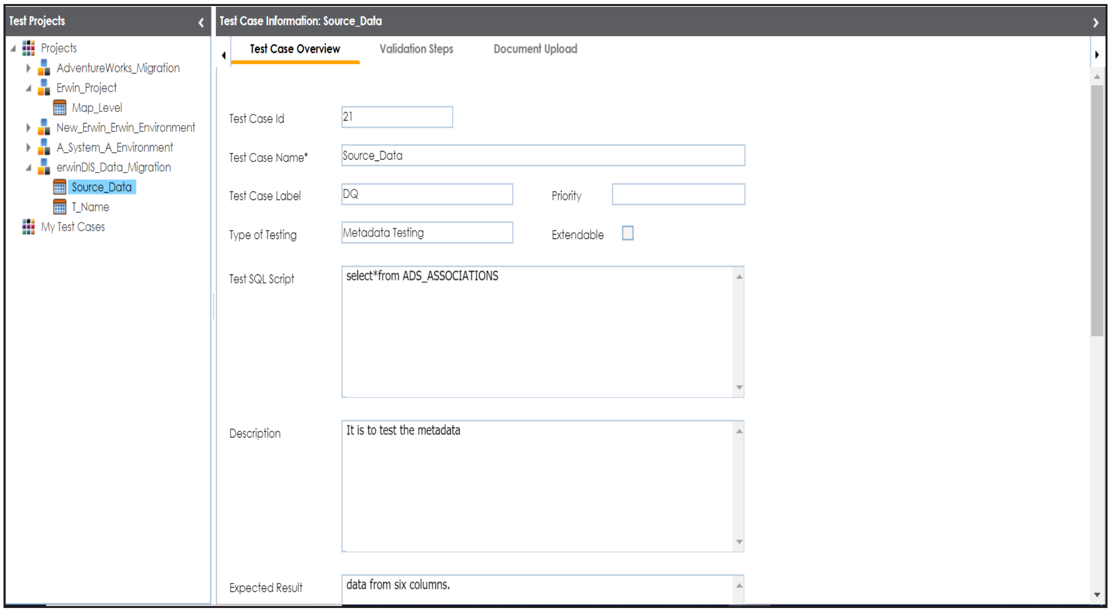
2. In the Test Projects pane, click a project.



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

3. Click a test case to view its details.

   The test case opens in a detailed view.



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

Test Case Overview

Use this tab to view the test case details.

Validation Steps

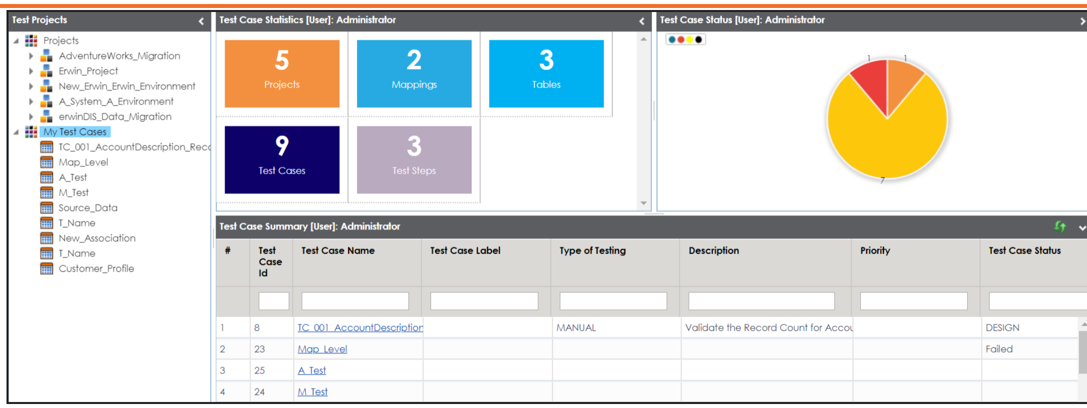
Use this tab to view the validation steps in the test case.

Document Upload

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

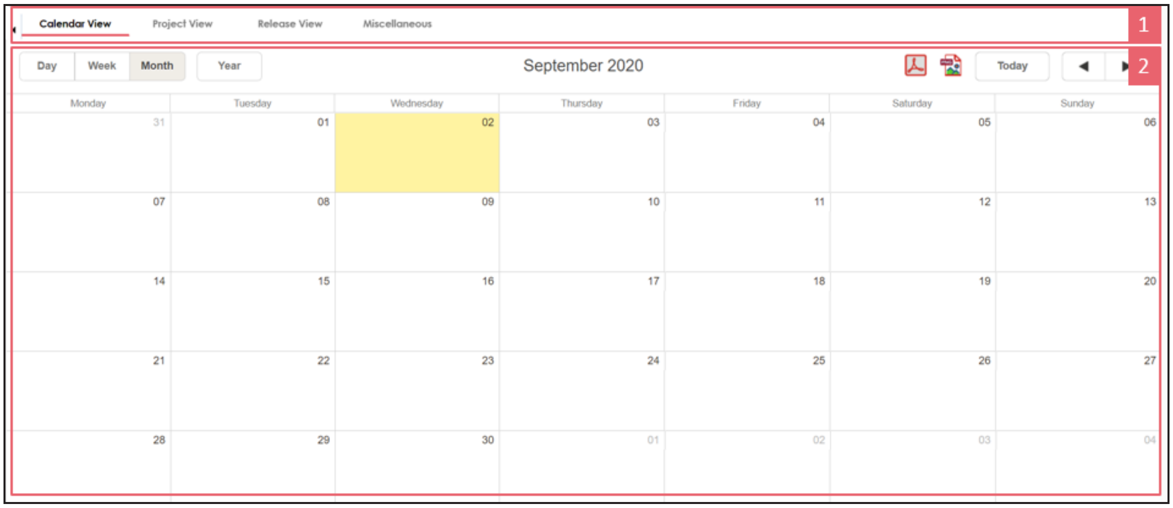
Expand **My Test Cases** node to browse the test cases you (logged in user) created.

Viewing and Analyzing Test Cases



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: • **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:

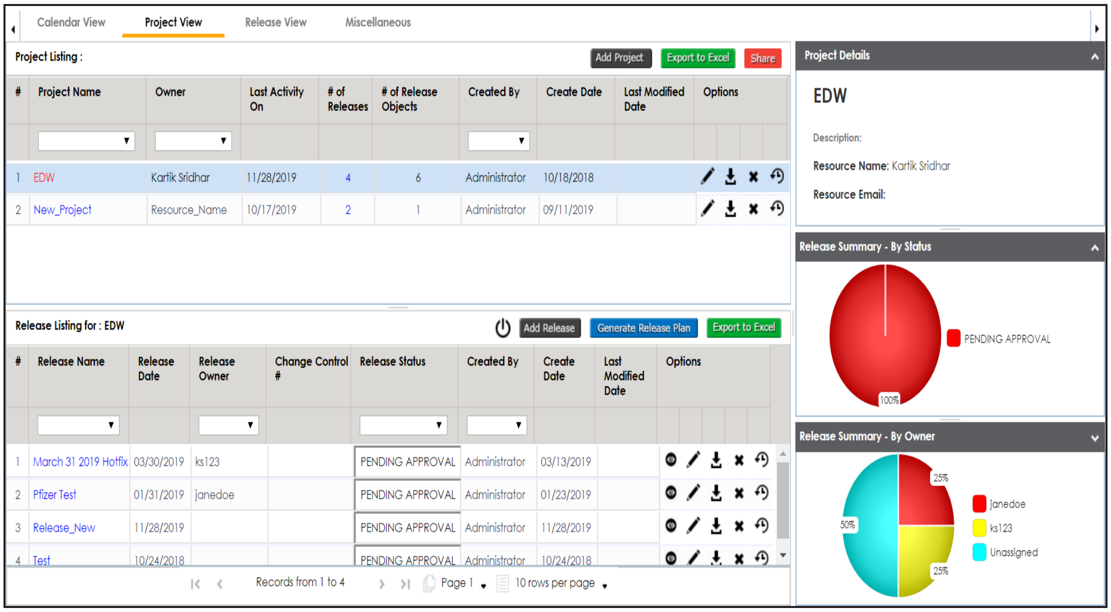
- Creating projects and adding releases
- Adding release objects to releases
- Moving release objects
- Sorting projects and releases

Creating Projects and Adding Releases

You can create projects and add releases to these projects.

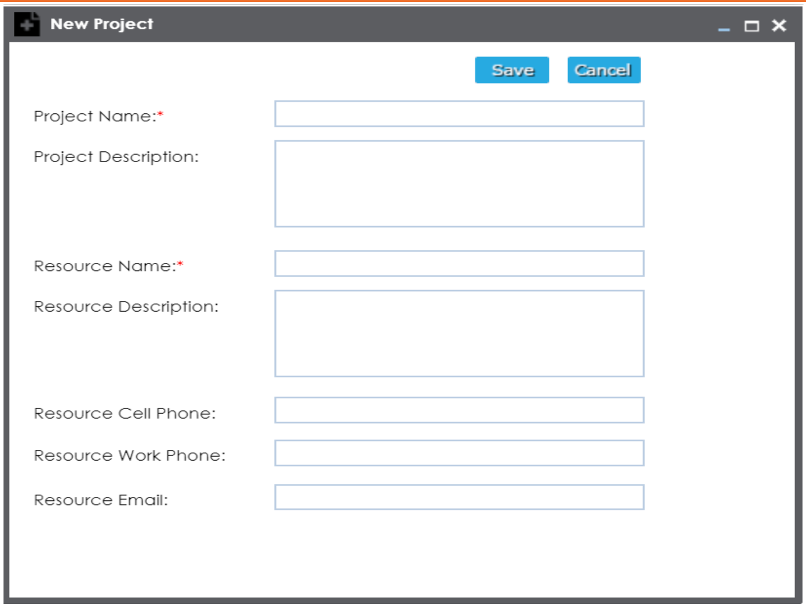
To create projects, follow these steps:

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



2. Click **Add Project**.

   The New Project page appears.



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

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.

Field Name	Description
	For example, jane.doe@mauris.edu

4. Click **Save**.

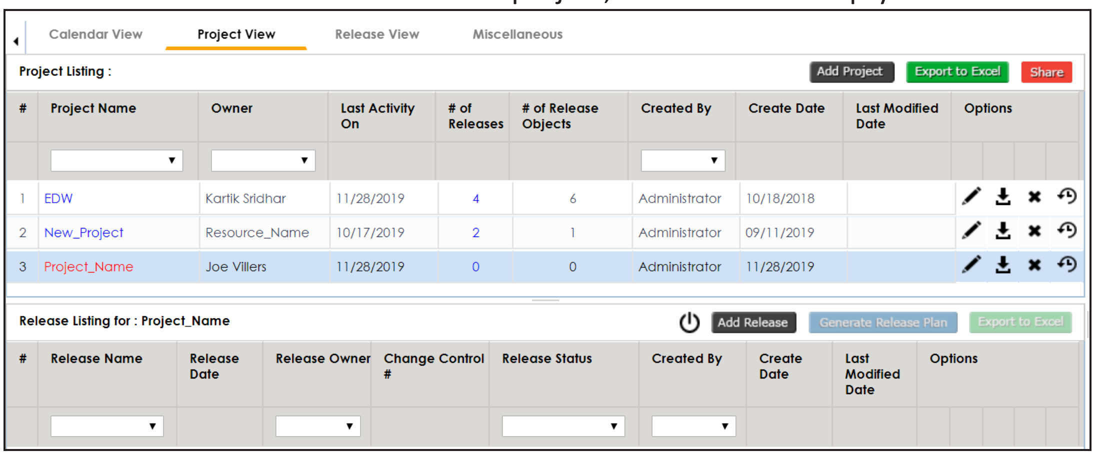
   The project is created and saved in the Project Listing.

To add releases to the project, follow these steps:

1. Under the **Project Listing** section, select a project.

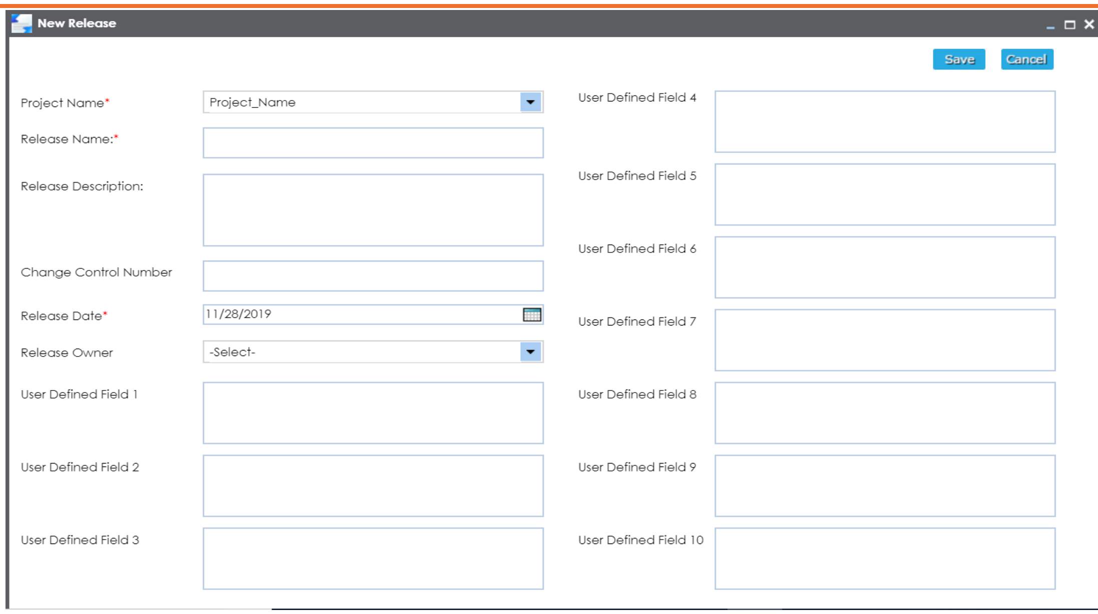
   The Release Listing for the project appears under the **Release Listing for:** section.

   If there are not release associated to a project, the list will be empty.

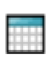


2. Click **Add Release**.

   The New Release page appears.



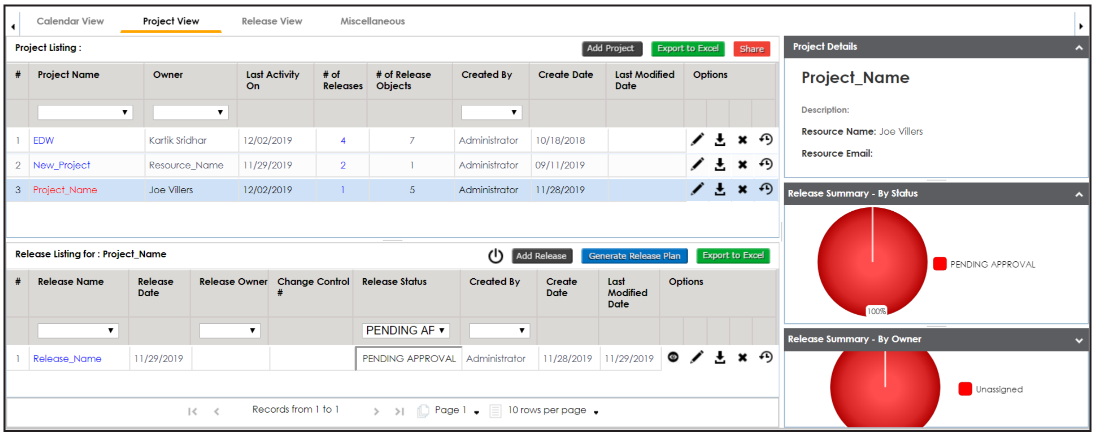
3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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.

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

4. Click **Save**.

   The release is added to the selected project.



5. Use the following options:

   View ()

   To view the release details, click .

   Edit ()

   To edit, the release, click .
   You can update the release status only by editing a release.

   Download ()

   To download the release details, click .

   Delete (✖)

   To delete the release, click ✖.

Once a release is created, you can add release objects to it.

Adding Release Objects to Releases

You can add following release objects to releases:

- Data item mappings
- Codesets
- Code mappings
- Miscellaneous objects

You can add new release object types under the Miscellaneous Objects list in the Release Manager Settings.

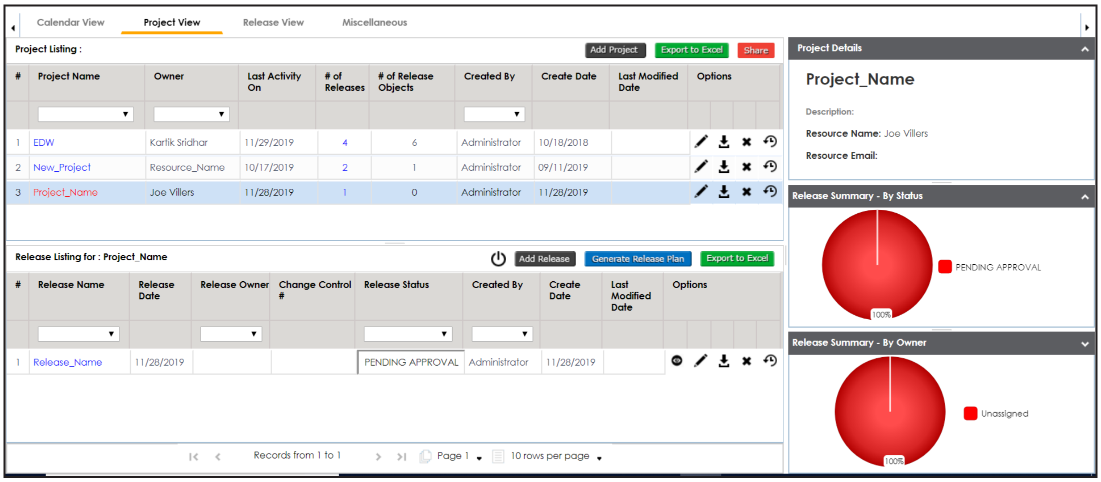
Adding Data Item Mappings as Release Objects

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

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

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

   The release listing of the project appears.



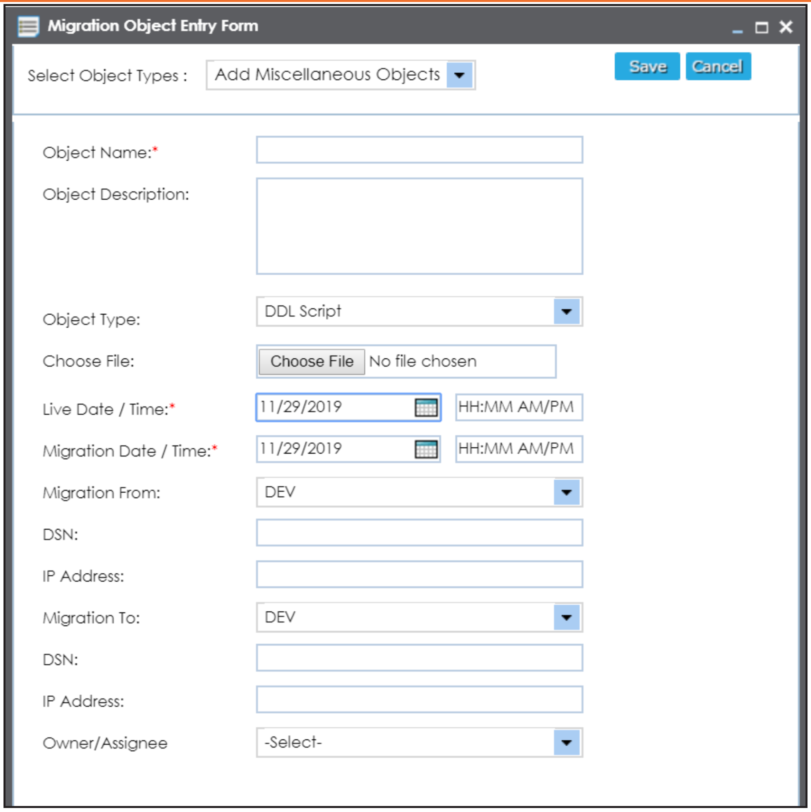
2. Click the required <Release_Name>.

   The Release View page appears showing the release object details.

3. Click **Add Object**.

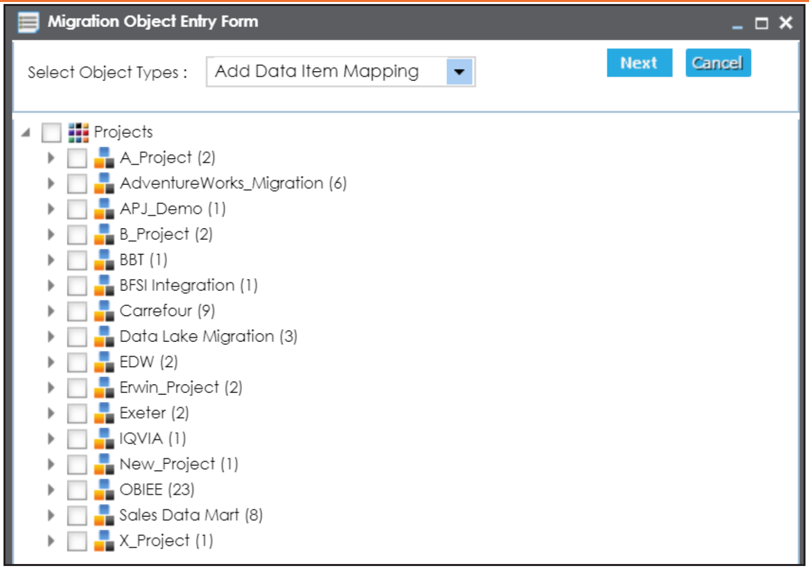
   The Migration Object Entry Form page appears.

Adding Data Item Mappings as Release Objects



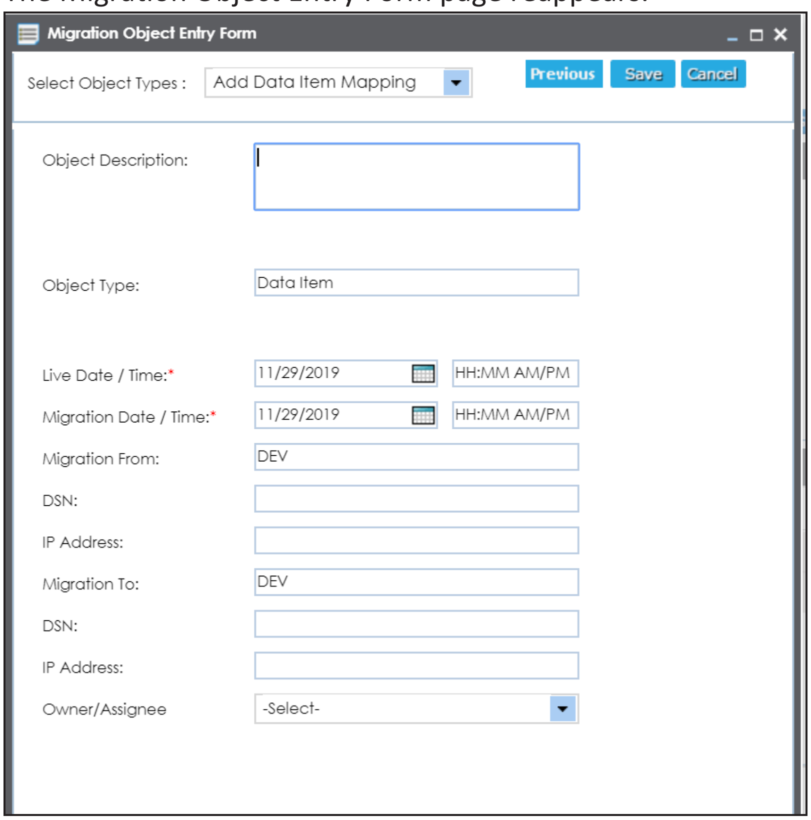
4. In **Select Object Types**, select **Add Data Item Mapping**.

   The following page appears.



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

   The Migration Object Entry Form page reappears.



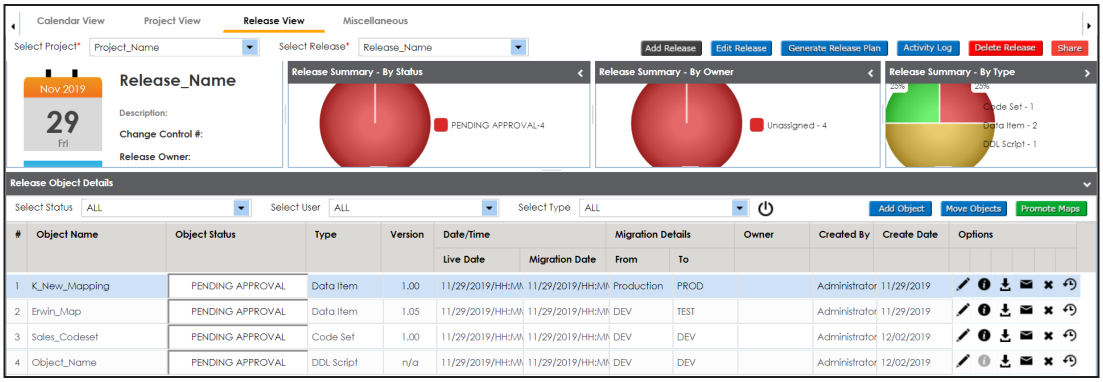
6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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 Datawarehouse 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

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.



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 ( )

   To view the mapping information, click .

   Download ( )

   To download the release object details, click .

   Email ( )

To send email notification about the release object click ✉.

Delete (✖)

To delete the release object, click ✖.

Promoting Data Item Mappings

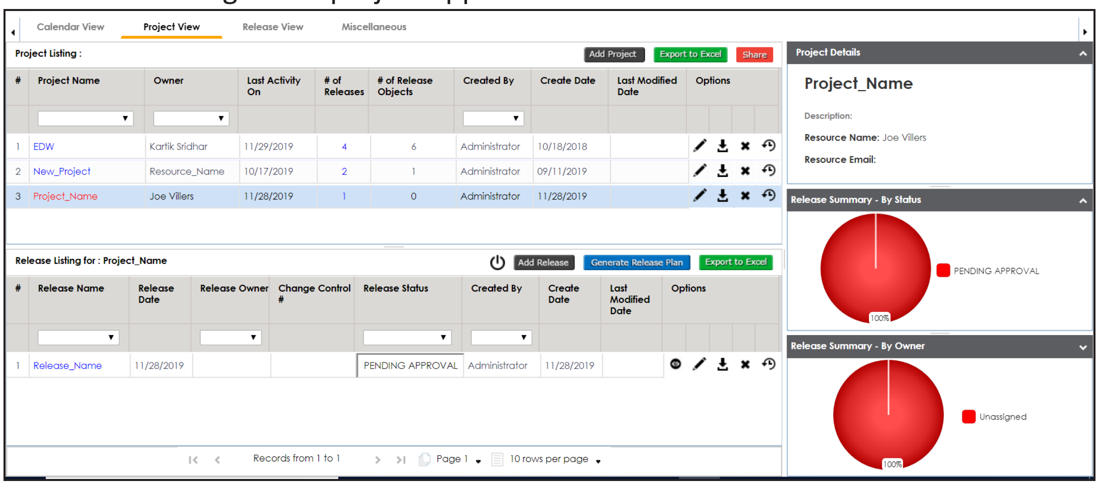
You can promote data item mappings to different release environments in the Release Manager.

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

To promote data item mappings, follow these steps:

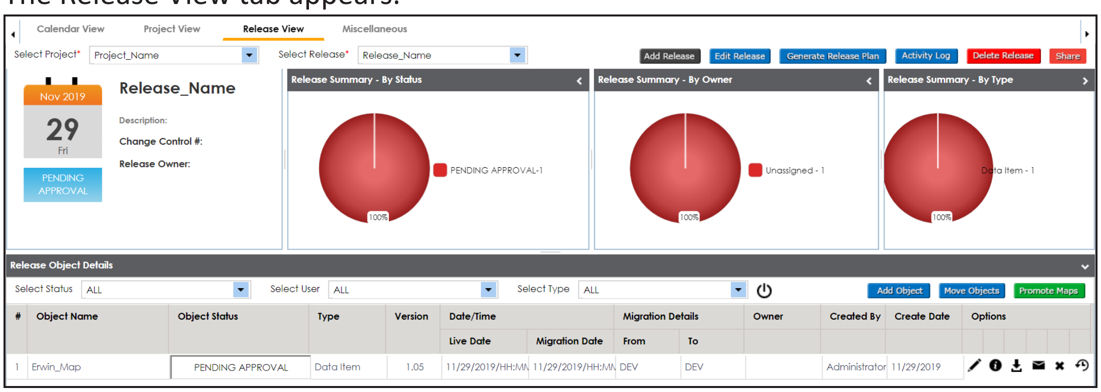
1. Under the **Project View** tab, click the required project.

   The release listing of the project appears.



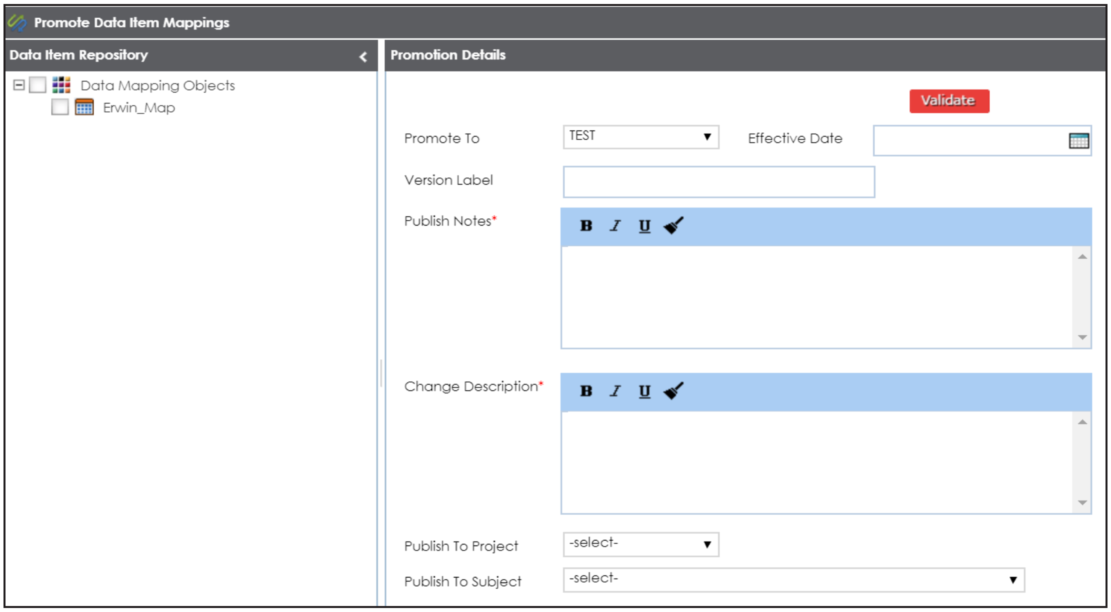
2. Click the required <Release_Name>.

   The Release View tab appears.



3. In the **Release Object Details** section, click the required <Data_Item_Mapping_ Object> and click **Promote Maps**.

   The Promote Data Item Mappings page appears.



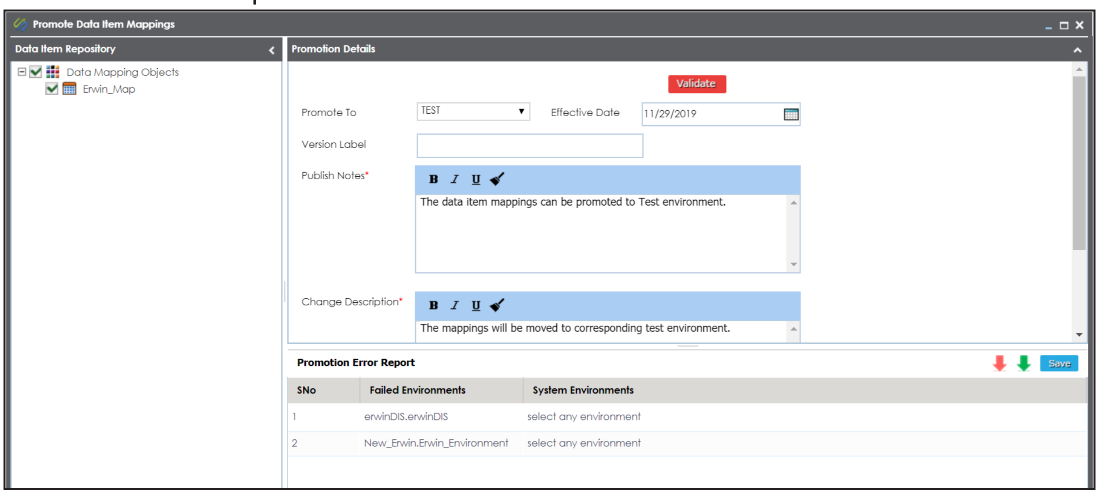
4. In **Data Item Repository**, select the required **<Map_Name>** check box.
5. In **Promotion Details**, enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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.

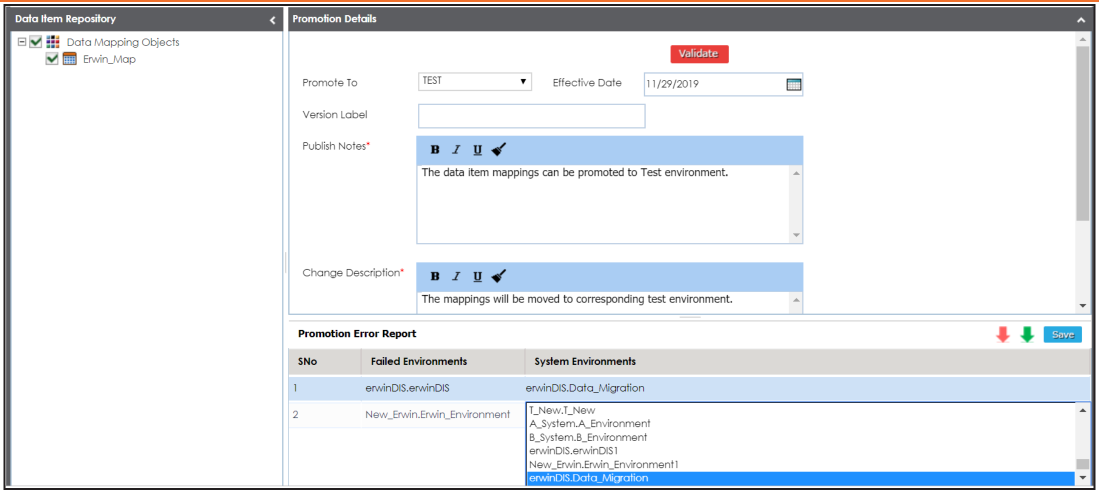
Field Name	Description
Publish Notes	Specifies the notes about the publishing of the data item mapping. For example: The data item mappings should be promoted to the Adventureworks_Migration.
Change Description	Specifies the description about the changes in the data item mapping. For example: The business 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.

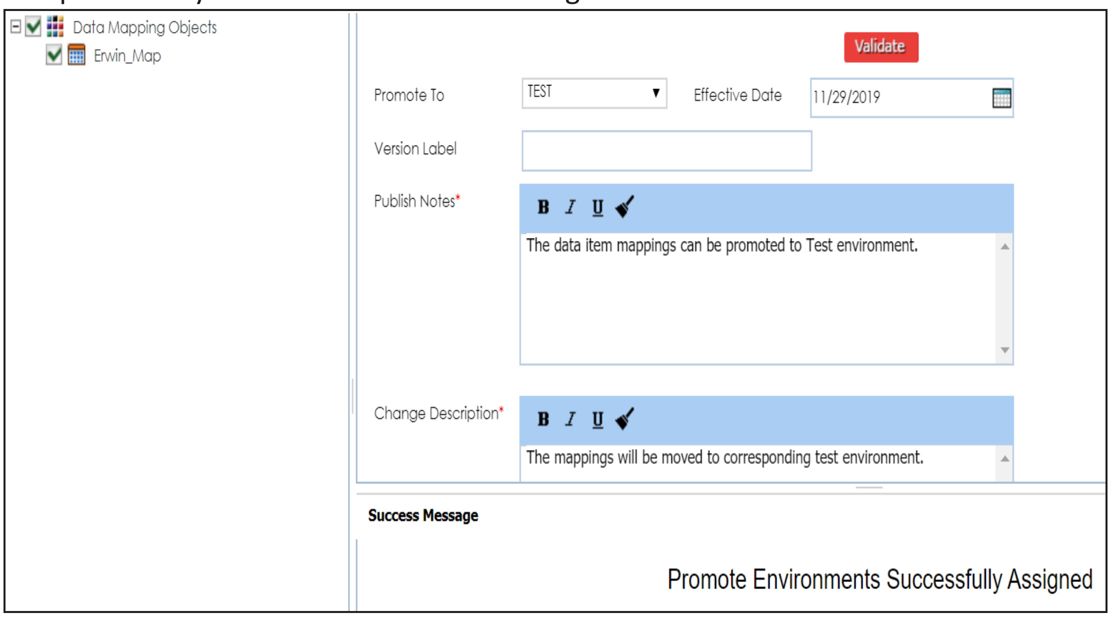


7. Double-click the corresponding cells to select the promote system environment for the mappings.



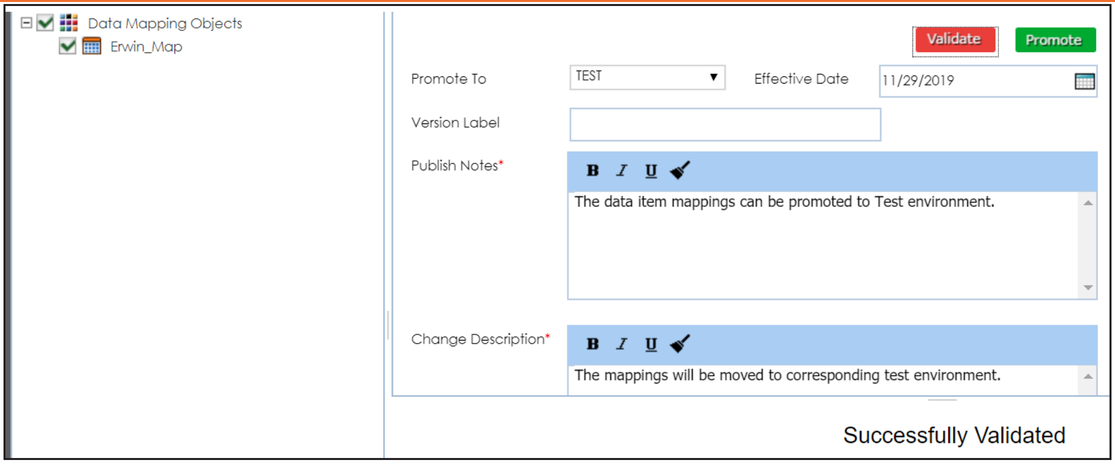
8. Click **Save**.

   The promote system environments are assigned.



9. Click **Validate**.

   The promotion is successfully validated.



10. Click **Promote**.

    The object is promoted to the selected project.

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

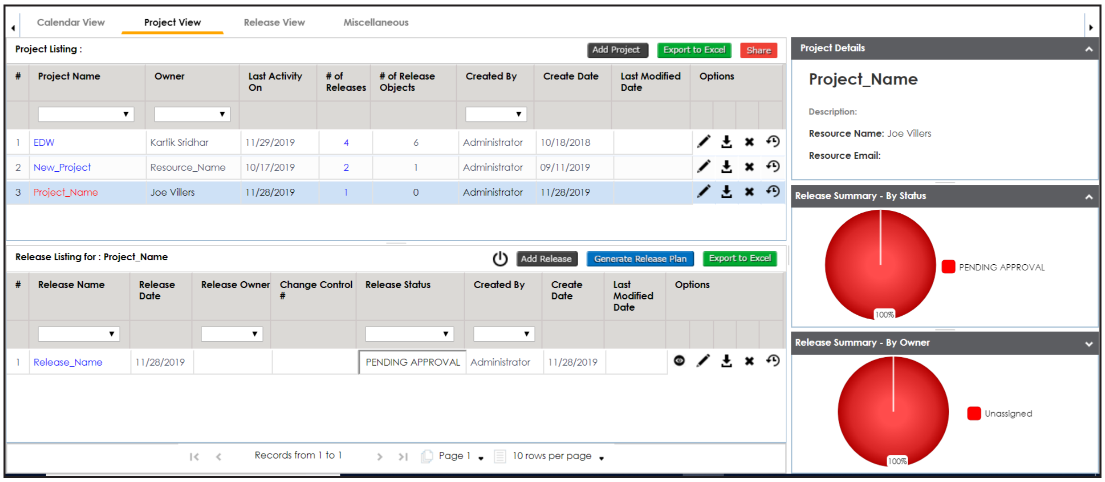
Adding Codeset as Release Objects

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

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

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

   The release listing of the required project appears.



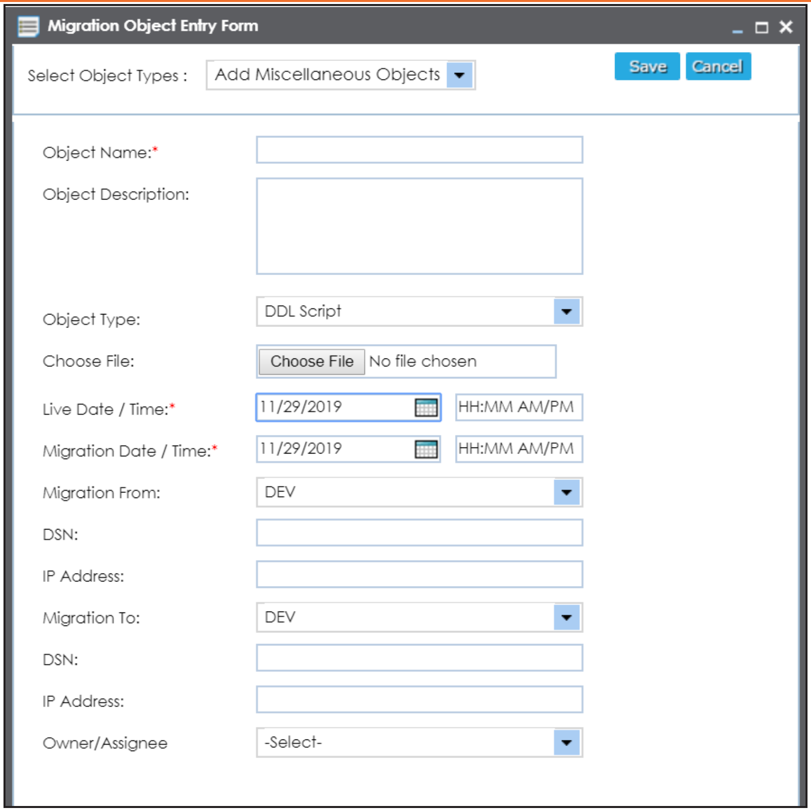
2. Click the required <Release_Name>.

   The Release View page appears.

3. Click **Add Object**.

   The Migration Object Entry Form page appears.

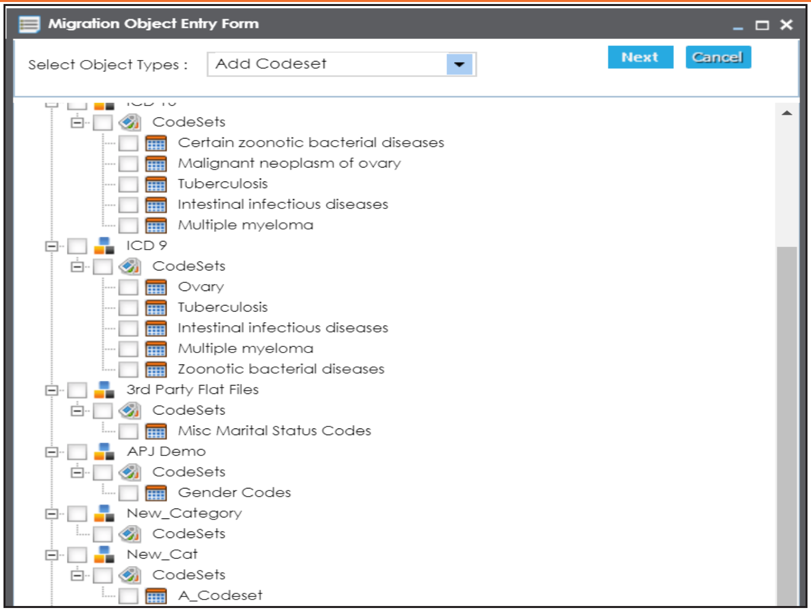
Adding Codeset as Release Objects



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

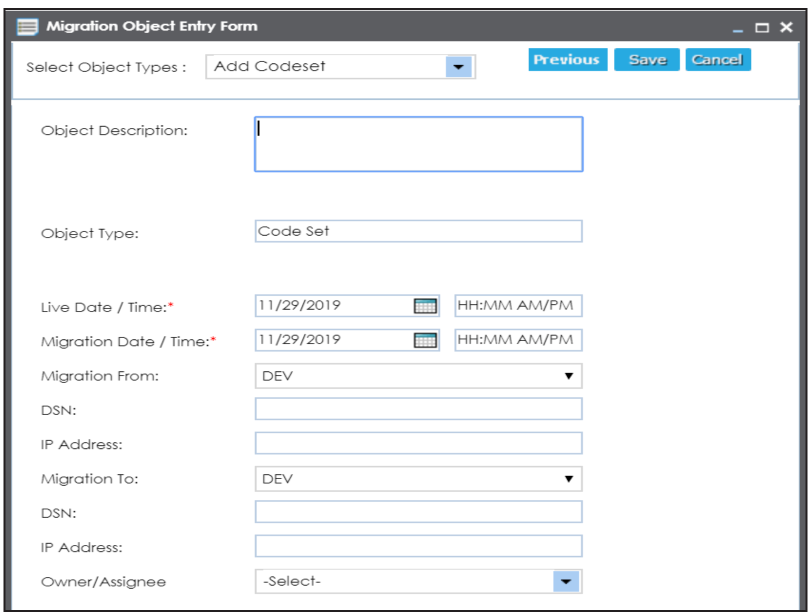
   The following page appears.

Adding Codeset as Release Objects



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

   The Migration Object Entry Form page reappears.



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

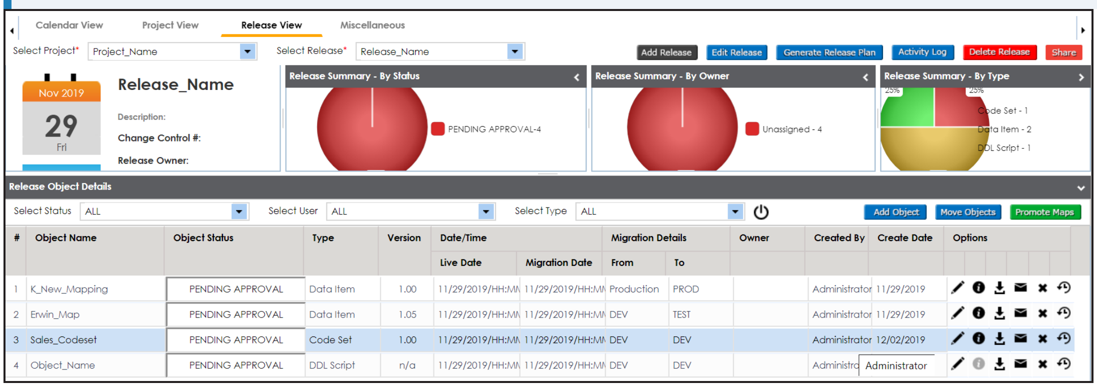
Field Name	Description
Object Description	Specifies the description about the release object being added to the release. For example: The release object is a codeset under the 3rd Party Flat Files category.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020 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

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 selected codesets are added as release objects to the release.

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



8. Use the following options:

   Edit ( )

   To edit, the release object, click .
   You can update the release object status only by editing a release object.

   Information ( )

   To view the mapping information, click .

   Download ( )

   To download the release object details, click .

   Email ( )

To send email notification about the release object click ✉.

Delete (✖)

To delete the release object, click ✖.

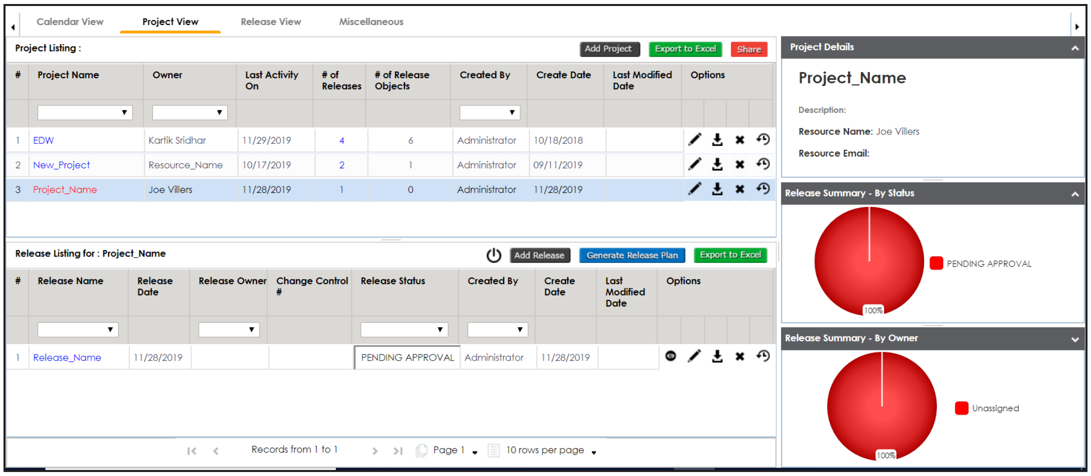
Adding Code Mappings as Release Objects

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

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

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

   The release listing of the required project appears.



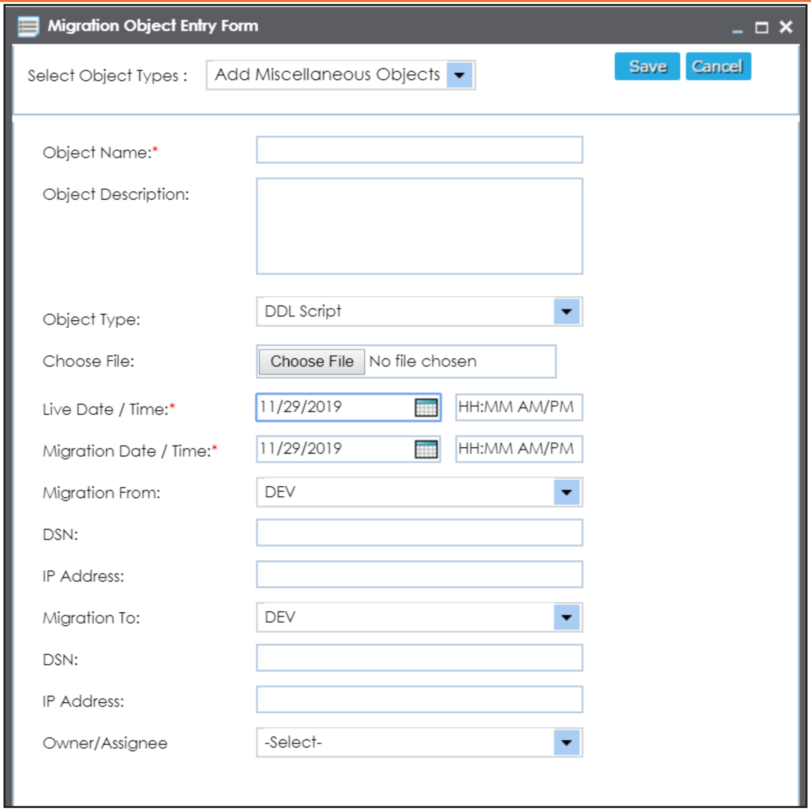
2. Click the required <Release_Name>.

   The Release View page appears showing the release object details.

3. Click **Add Object**.

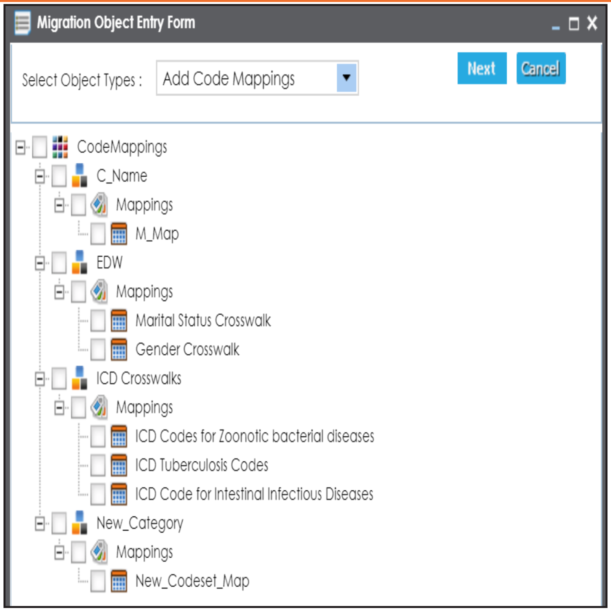
   The Migration Object Entry Form page appears.

Adding Code Mappings as Release Objects



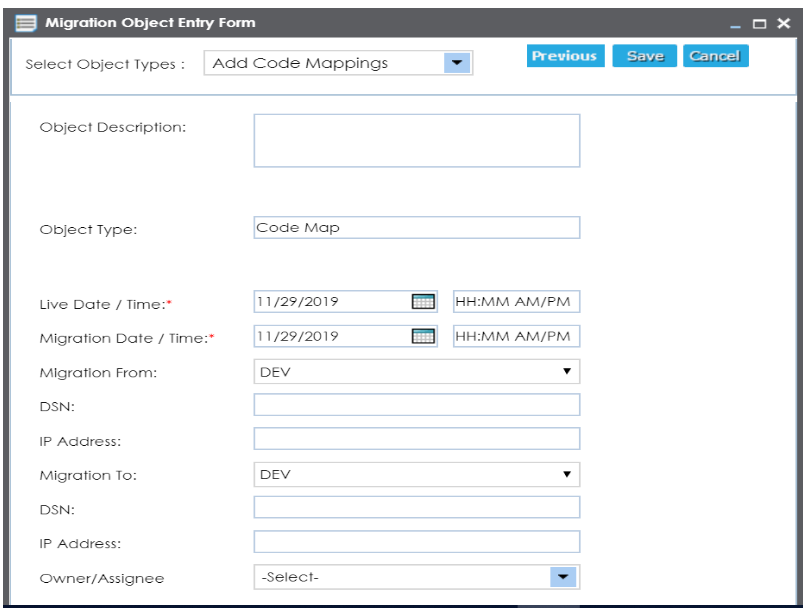
4. In **Select Object Types**, select **Add Code Mappings**.

   The following page appears.



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

   The Migration Object Entry Form page reappears.



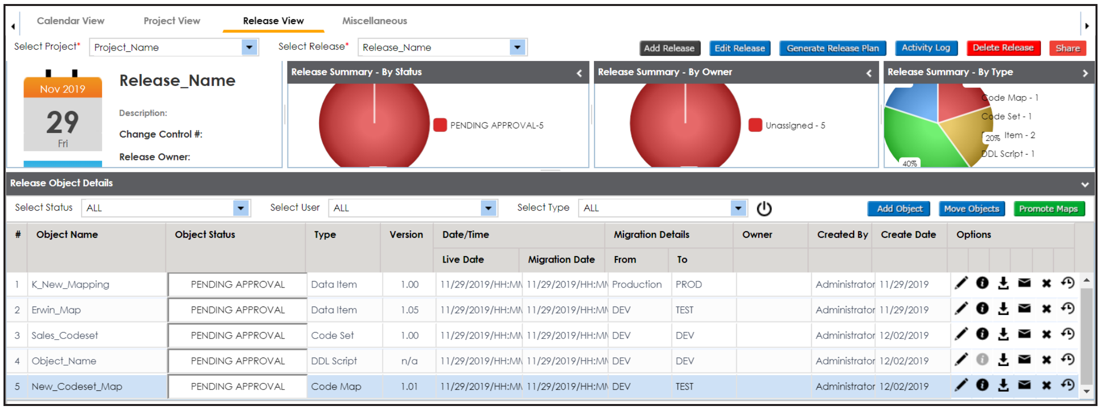
6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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.

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.



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 ✖.

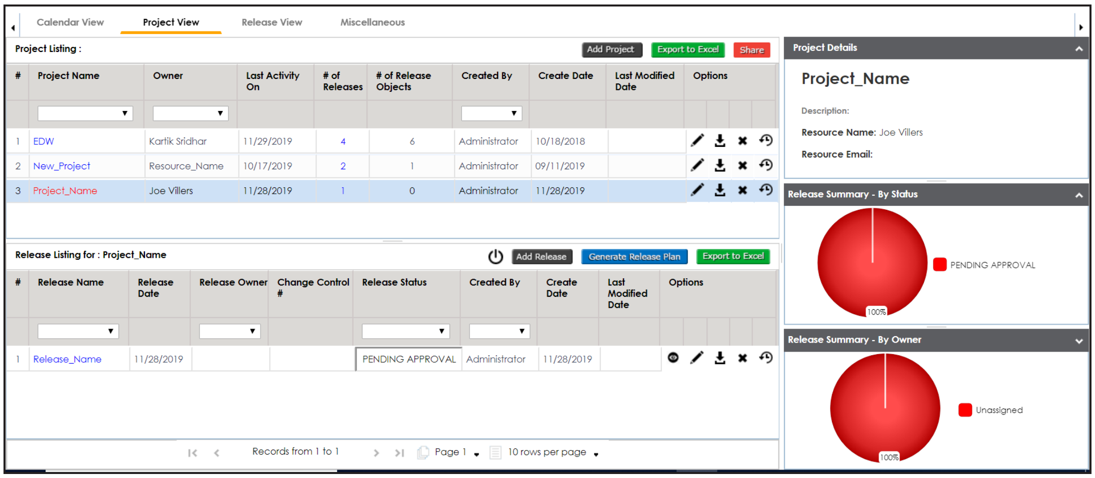
Adding Miscellaneous Objects

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.

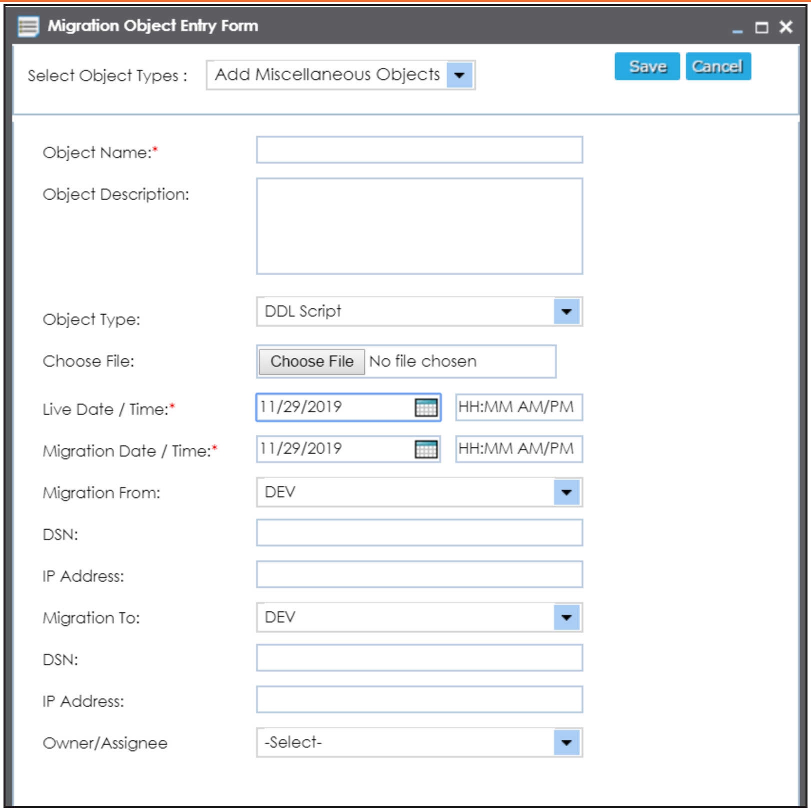


2. Click the required <Release_Name>.

   The Release View page appears.

3. Click **Add Object**.

   The Migration Object Entry Form page appears.



4. In **Select Object Types**, select **Add Miscellaneous Objects**.
5. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

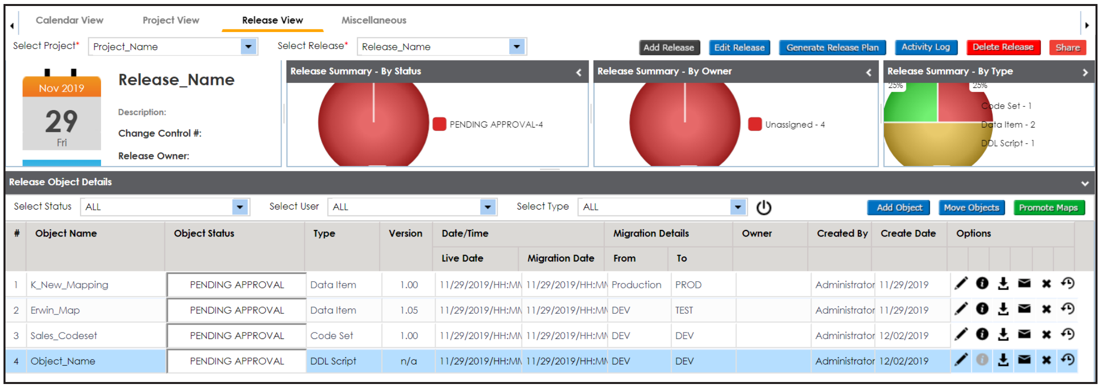
Field Name	Description
Object Name	Specifies the name of the release object being added to the release. For example, AdventureWorks_DDL.
Object Description	Specifies the description about the release object. For example: The release object is the DDL script of the AdventureWorks environment.
Object Type	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.

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-

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.



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 ()

To view the mapping information, click .

Download ()

To download the release object details, click .

Email ()

To send email notification about the release object click .

Delete ()

To delete the release object, click .

Moving Release Objects

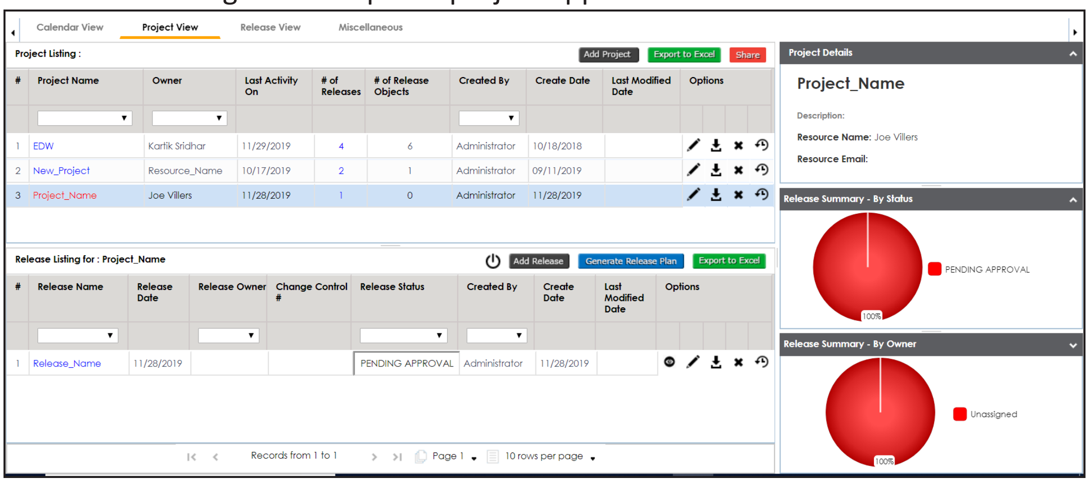
You can move release objects to a different release within the same project or to a release in a different project.

> You cannot move a data item mapping object.

To move release objects, follow these steps:

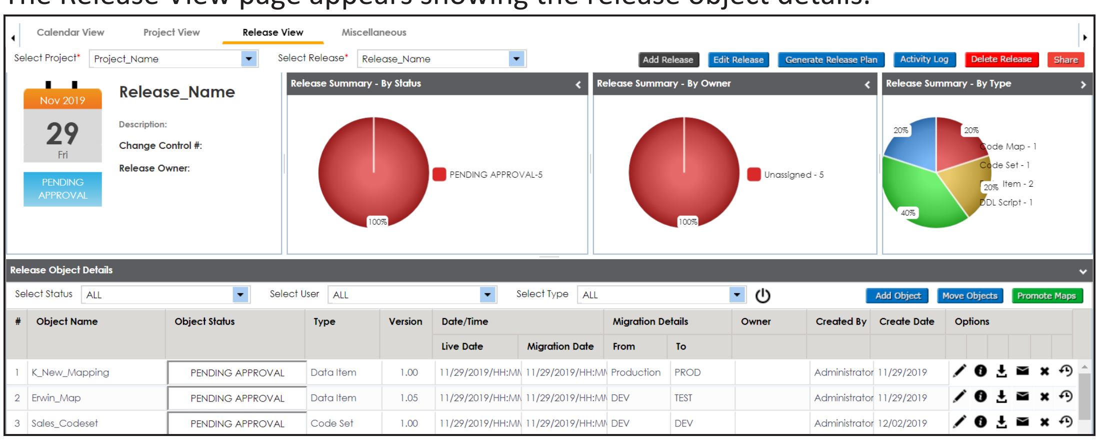
1. Under the **Project View** tab, click the required project.

   The release listing of the required project appears.



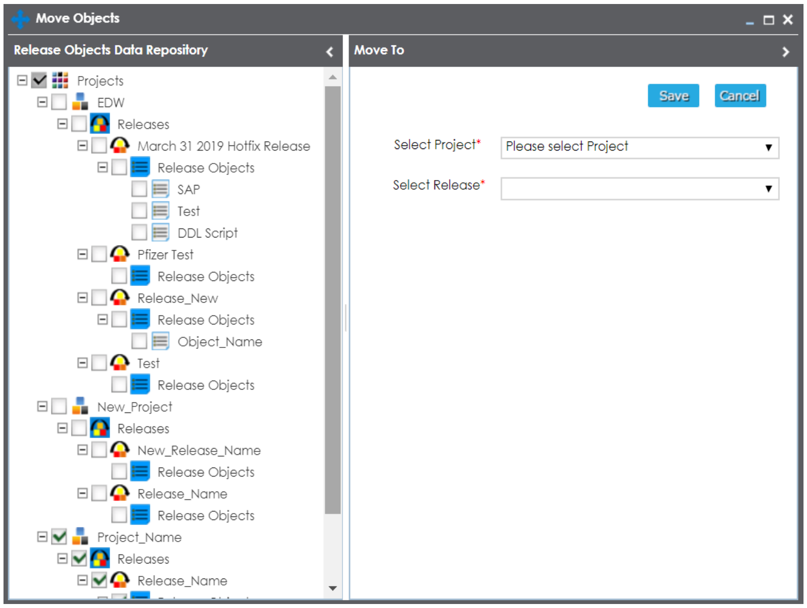
2. Click the required **<Release Name>**.

   The Release View page appears showing the release object details.



3. Click **Move Object**.

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



4. In the Release Objects Data Repository tab, select the release objects.

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

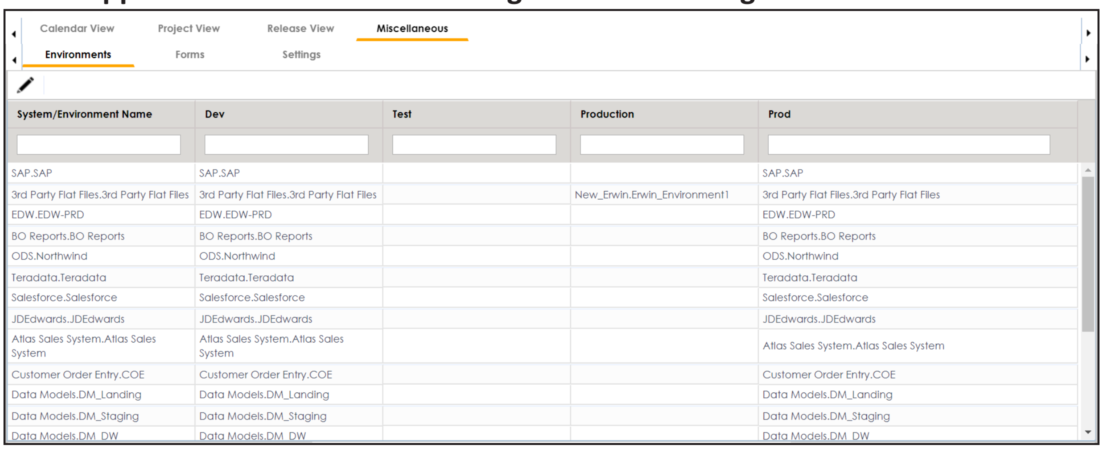
b. Owner

c. Created Date

d. Last Modified Date

To sort projects, follow these steps:

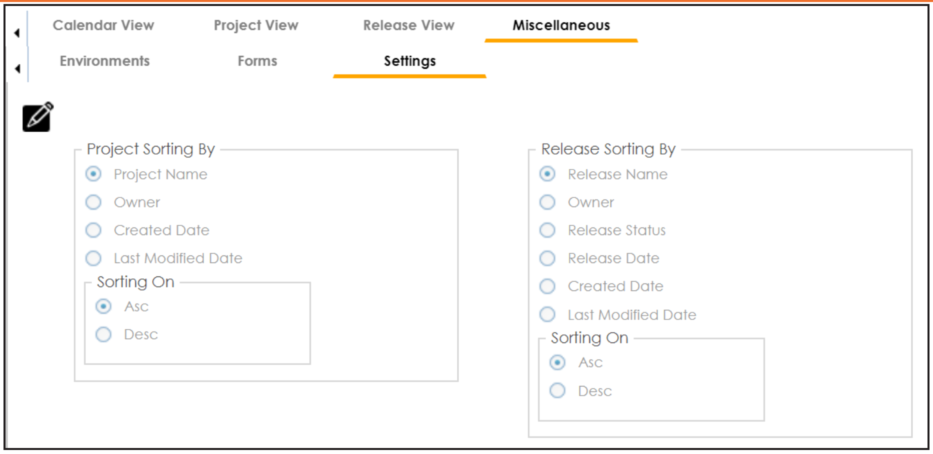
1. Go to **Application Menu** > **Data Catalog** > **Release Manager** > **Miscellaneous**.



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.



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

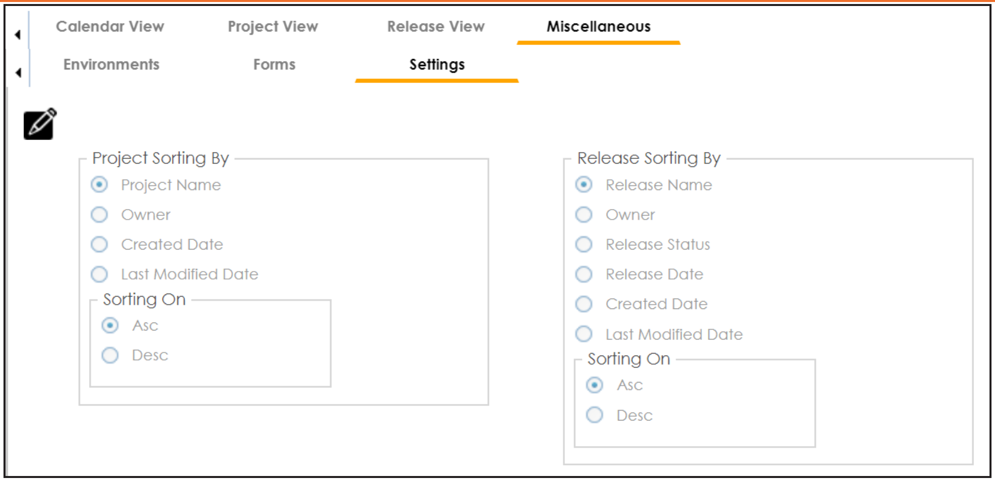
   The project listings are sorted in the Project View.

You can sort release listings by:

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

To sort release listings, follow these steps:

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



2. Click .
3. Select the appropriate **Release Sorting By** option.
4. Select the appropriate **Sorting On** option.
5. Click **Save**.

   The release listings are sorted in the Project View.