

GUIDE

Quest Data Intelligence

Life Cycle Management Guide 16.0



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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:

The screenshot displays the Requirements Manager dashboard. On the left, the 'Requirements Workspace' pane shows a tree structure with 'TechPubs (3)' and 'Tech Pubs 06 (0)'. Below it is a 'Summary' section with a pie chart and a legend: Pending Review (blue), Pending Approval (yellow), Approved (green), Published (red), and Rejected (orange). The main area, 'Specifications Listing', contains a table with the following data:

#	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	1	TechPubsWitiz	TechPubs		Pending Rev	Administrator	04/09/2020 03:44:43	Administrator	04/09/2020 03:44:43			
2	2	Tital	TechPubs/TechPut		Pending Rev	Administrator	07/22/2020 10:19:13	Administrator	07/22/2020 10:19:13			
3	3	Tital1	TechPubs/TechPut		Pending Rev	Administrator	07/22/2020 10:42:35	Administrator	07/22/2020 10:42:35			

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

Managing requirements involves the following:

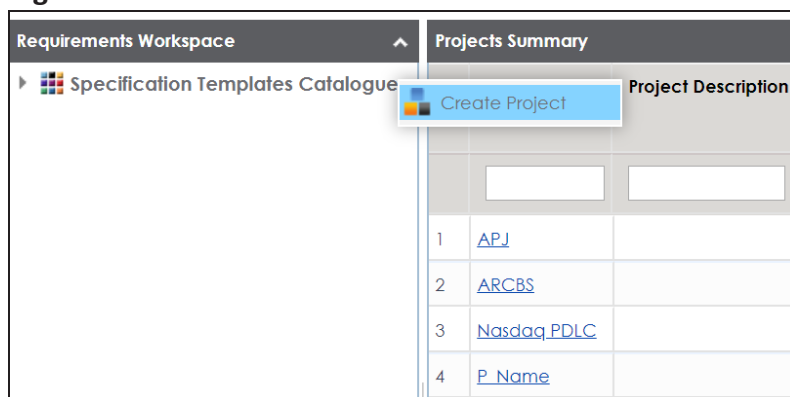
- [Creating and managing projects](#)
- [Creating and managing specifications](#)
- [Linking the requirements to mappings](#)

Creating Projects

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

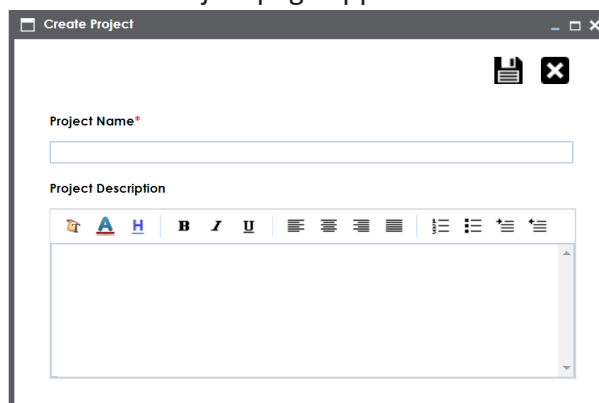
To create projects, follow these steps:

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



3. Click **Create Project**.

The Create Project page appears.



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

For example:

Creating Projects

- **Project Name:** Nasdaq PDLC
- **Project Description:** This project captures functional and business requirements of the data migration project

5. Click .

The project is created and added under Specification Templates Catalogue.



You can also create subjects under projects to group specifications by their functions.

Once a project is created you can:

- [Configure users](#)
- [Create specifications](#)

Right-click or select a project in the Requirements Workspace pane to manage it. Managing projects involves:

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

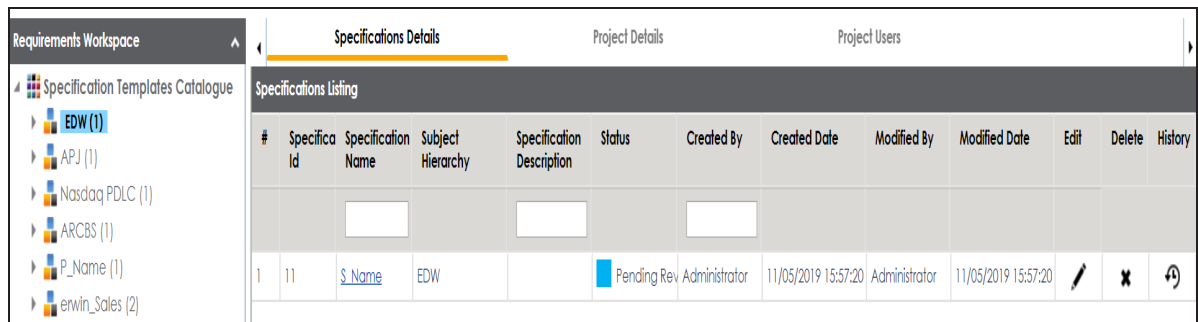
Configure Users

Once you have created a project, you can configure users to access and work on the project. These users will have Write access to all subjects and specifications under a project.

To configure users, follow these steps:

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

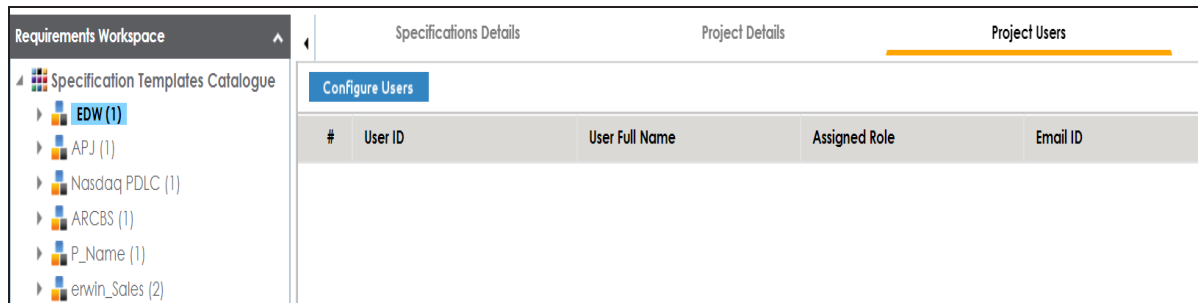
The following page appears.



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

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

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



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

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

3. Click **Configure Users**.

The Assign/Unassign Users page appears.

Configure Users

Assign/Unassign Users

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

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

5. Click .

The selected users are assigned to the project.

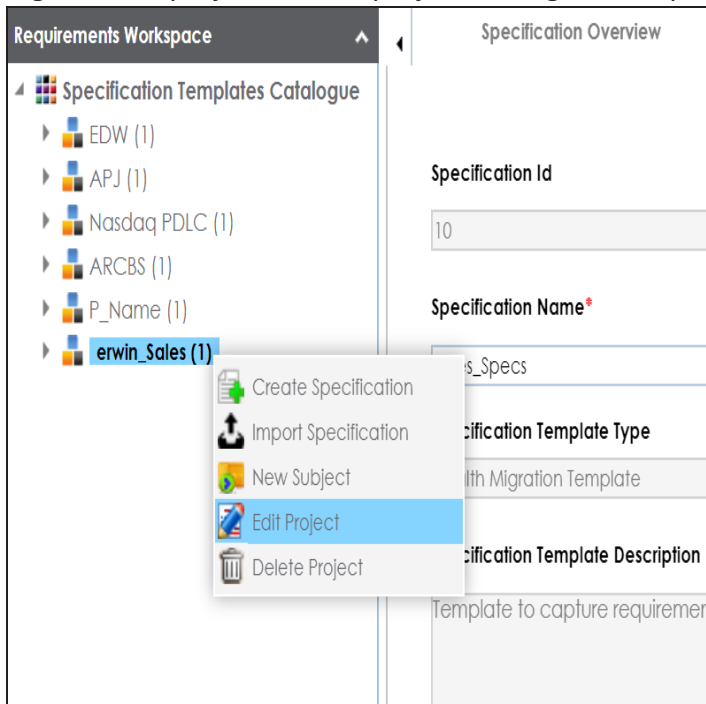
Managing Projects

Managing projects involves:

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

To manage project, follow these steps:

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



2. Use the following options:


New Subject

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

Edit Project

Managing Projects

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

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

Delete Project

Use this option to delete the project.

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

Requirements Workspace

Specifications Templates Catalogue

TechPubs (3)

Specifications

TechPubsWriting (v1.00)

TechPubs (2)

Specifications Details

Project Details

Project Users

Specifications Listing

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

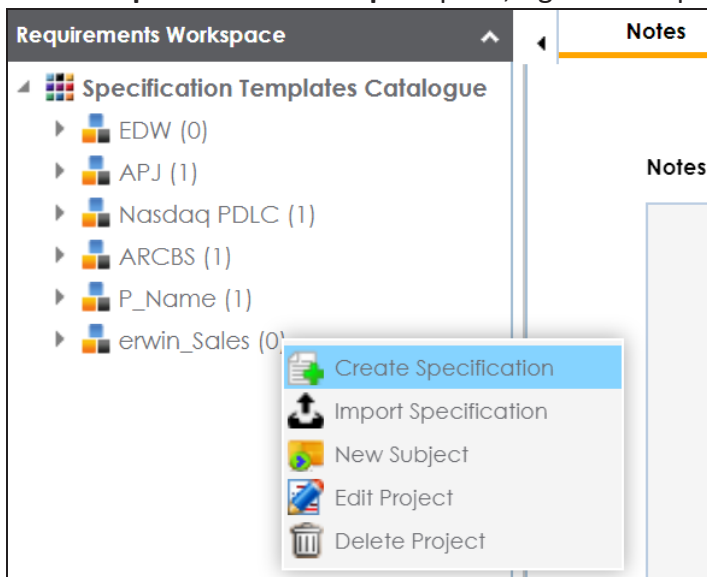
Creating Specifications

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.

Creating Specifications

Field Name	Description
Version Label	Specifies the version label of the specification. 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:

Creating Specifications

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

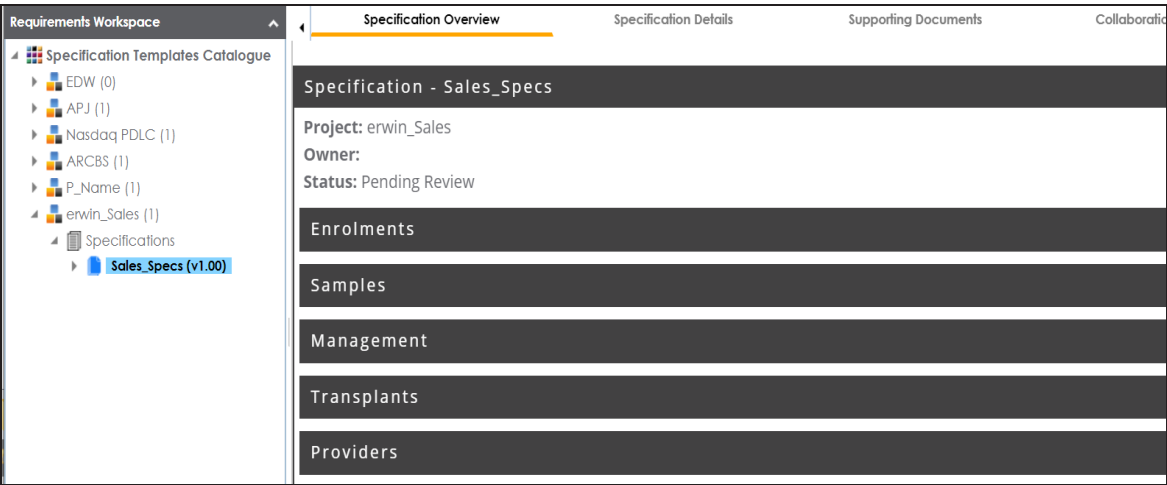
Documenting Requirements



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 Artifacts](#) topic.

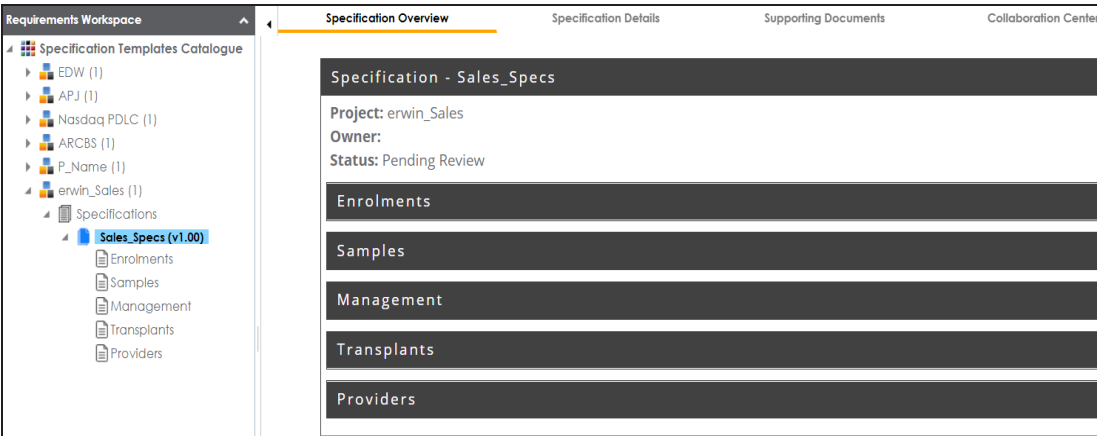
Adding Supporting Documents

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

To add supporting documents, follow these steps:

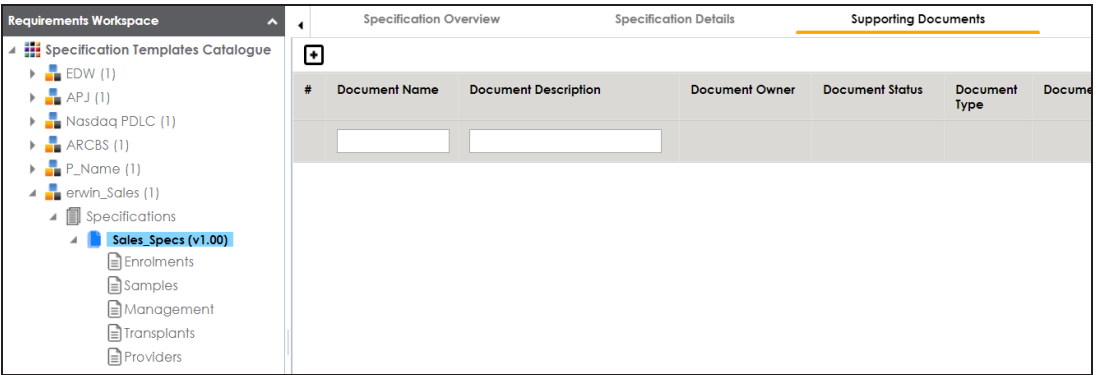
1. In the **Requirements Workspace** pane, select a specification.

The specification opens in a detailed view.



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

The following page appears.




3. Click .

The New Document Form page appears.

Adding Supporting Documents

New Document Form


Document Name*

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

Document Owner


Document Link

Document Description



Approval Required Flag ☐

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

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

Adding Supporting Documents

Field Name	Description
Document Status	<p>Specifies the status of the document.</p> <p>For example, In Progress.</p> <p>This field is available only when the Approval Required Flag check box is selected.</p>


5. Click .

The document is added to the Supporting Documents list.

Adding Tasks


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

To add tasks, follow these steps:


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

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

Adding Tasks

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

6. Click .

The task is created and saved. Use  to edit the task details and attach relevant documents.

Chat

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

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

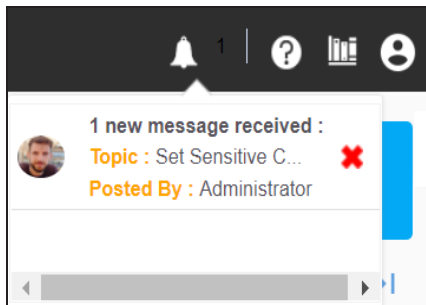
Assigned

Use this option to send messages to the assigned users.

External Users

Use this option to send messages to external users.

Users are notified via Messaging Center.



Adding Tasks

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

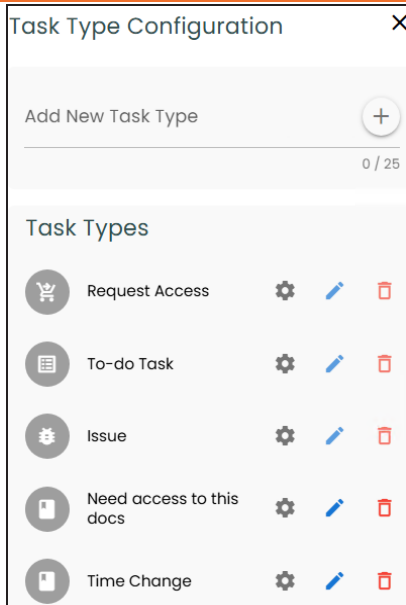
You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue, are available. You cannot edit or delete these task types. Additionally, you can create custom task types depending on your requirements.

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.

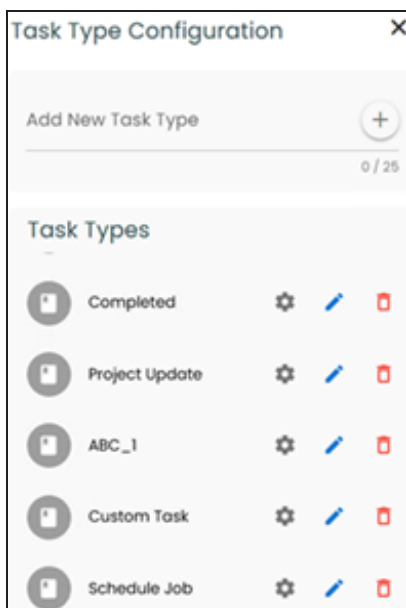
Adding Tasks



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.



Adding Tasks

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.

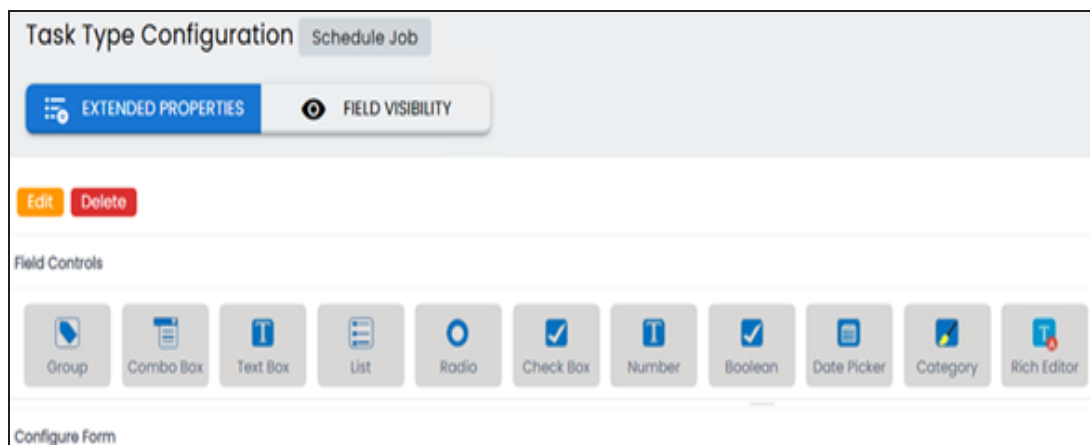
Delete (🗑️)

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.

Adding Tasks

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 screenshot displays the 'Task Type Configuration' window with the 'Schedule Job' tab selected. It features two main panes: 'Field Controls' and 'Configure Form'. The 'Field Controls' pane contains icons for various UI elements: Group, Combo Box, Text Box, List, Radio, Check Box, Number, Boolean, Date Picker, Category, and Rich Editor. The 'List' element is selected and dragged into the 'Configure Form' pane. The 'Configure Form' pane is divided into two sections: a visual representation of the 'List' field and a 'Configure Form' table. The table lists properties and their values:

Property	Value
Published	<input checked="" type="checkbox"/>
Field	List
Type	List
Dependencies	Type or click here
Configure Values	<button>Configure</button>
Mandatory	<input type="checkbox"/>
Description	

A red note at the bottom states: 'Note: 1. Double click on the field cell to update the field name. 2. Select the field controls to edit the properties.'



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.

Adding Tasks

Property	Description
	For example, List.
Type	Specifies the type of the field. 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: <ul style="list-style-type: none">▪ 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.

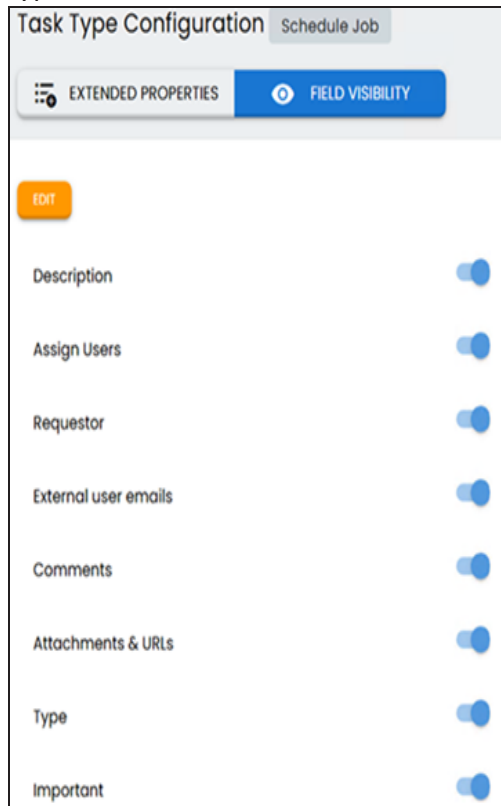
3. Click **Save**.

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

To configure field visibility, follow these steps:

Adding Tasks

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:

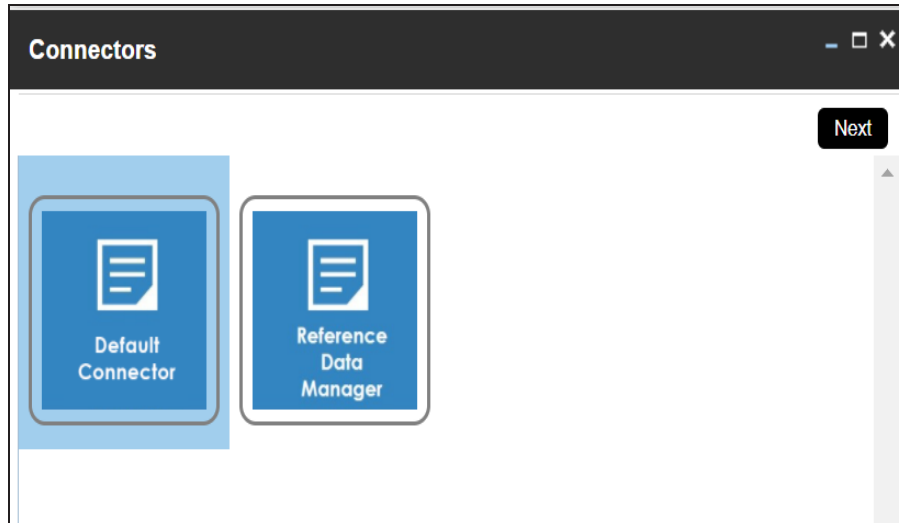
Adding Tasks

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

Ensure that you are in edit mode.

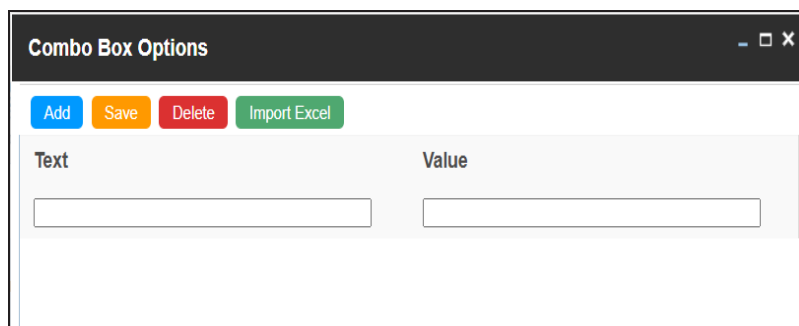
2. In the **Properties** section, click **Configure**.

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.



Adding Tasks

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.

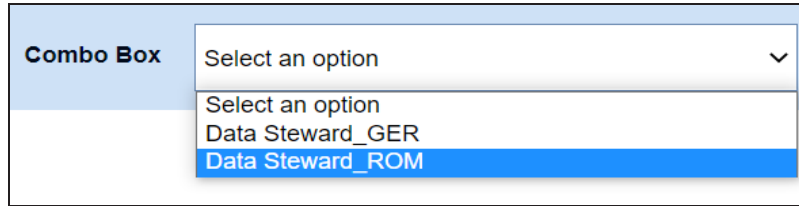
The Text corresponds to options whereas the Value corresponds to underlying value of an option. You can add as many values as needed.

Text	Value
Data Steward_GER	rcooper
Data Steward_ROM	vsmith
<input type="text"/>	<input type="text"/>

3. Click **Save**.

Adding Tasks

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

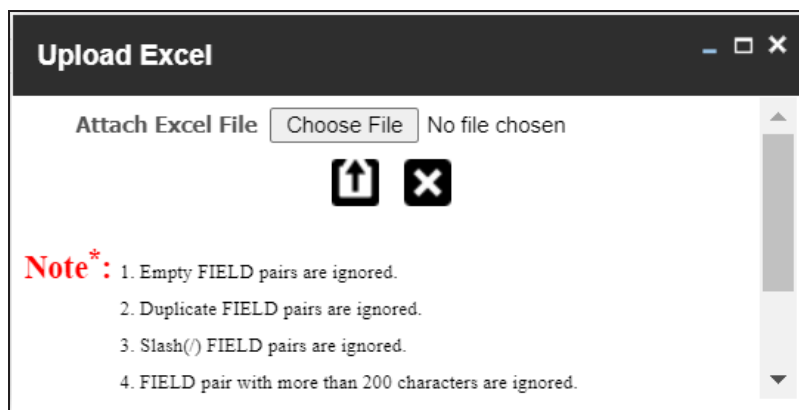


The image shows a 'Combo Box' UI element. It has a label 'Combo Box' on the left. The main area is a dropdown menu with a downward arrow on the right. The dropdown is open, showing three options: 'Select an option' (the first option), 'Data Steward_GER', and 'Data Steward_ROM' (the second option, which is highlighted in blue).

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

1. Click **Import Excel**.

The Upload Excel page appears.





The image shows a window titled 'Upload Excel'. Inside, there is a section 'Attach Excel File' with a 'Choose File' button and the text 'No file chosen'. Below this are two icons: an upward arrow and a square with an 'X'. Further down, there is a red 'Note*' followed by a list of four points: 1. Empty FIELD pairs are ignored. 2. Duplicate FIELD pairs are ignored. 3. Slash(/) FIELD pairs are ignored. 4. FIELD pair with more than 200 characters are ignored.

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.

Adding Tasks

Upload Excel			
 			
#	GROUP NAME	ROLE NAME	USER ID
#	Select Column To Import	Select Column To Import	Select Column To Import
1	Data Stewards	Data Steward_GER	mmannigan
2	Data Stewards	Data Steward_GER	mmenza
3	Data Stewards	Data Steward_GER	mmannigan

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

The available options appear.

 			
#	GROUP NAME	ROLE NAME	USER ID
#	Select Column To Import	<div>Select Column To Import FIELD VALUE Clear Selection</div>	Select Column To Import
1	Data Stewards	Data Steward_GER	mmannigan

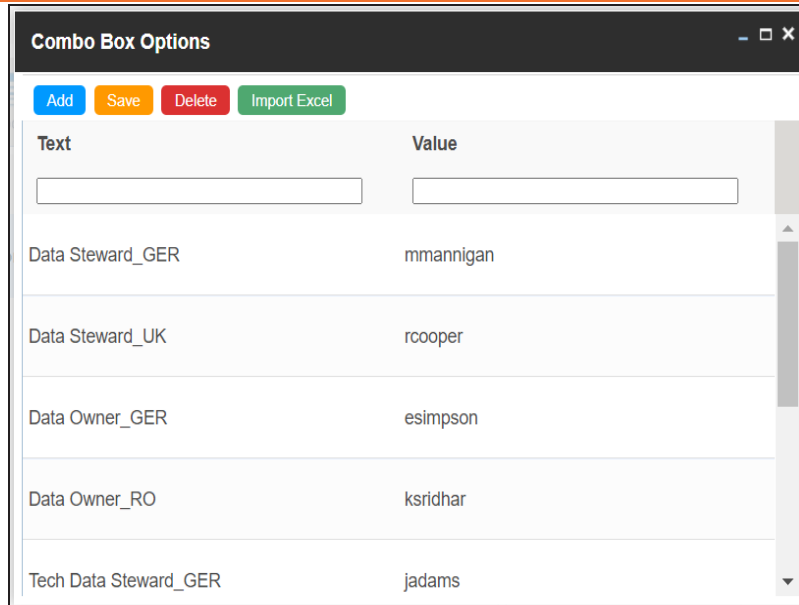
4. Select the appropriate option.

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**.

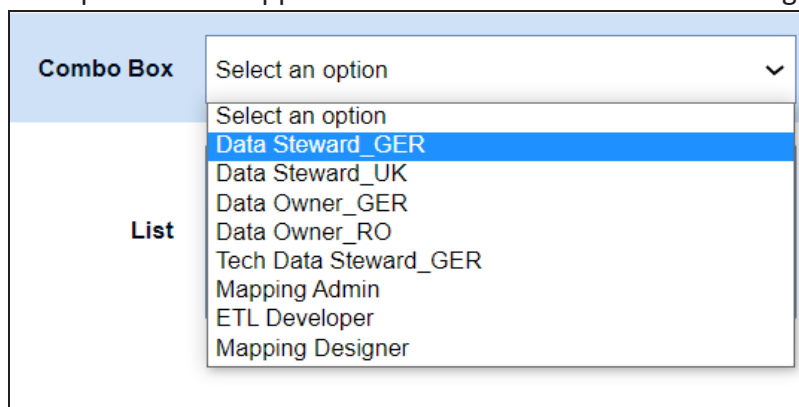
Adding Tasks



Text	Value
Data Steward_GER	mmannigan
Data Steward_UK	rcooper
Data Owner_GER	esimpson
Data Owner_RO	ksridhar
Tech Data Steward_GER	jadams

6. Click **Save**.

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



Combo Box
Select an option
Select an option
Data Steward_GER
Data Steward_UK
Data Owner_GER
Data Owner_RO
Tech Data Steward_GER
Mapping Admin
ETL Developer
Mapping Designer

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.

Adding Tasks

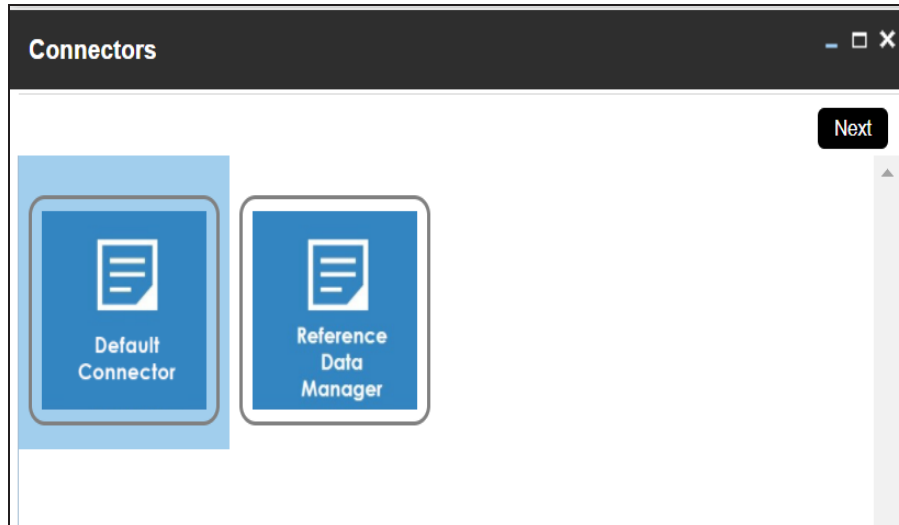
To configure option values using reference data manager connector, follow these steps:

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

Ensure that you are in edit mode.

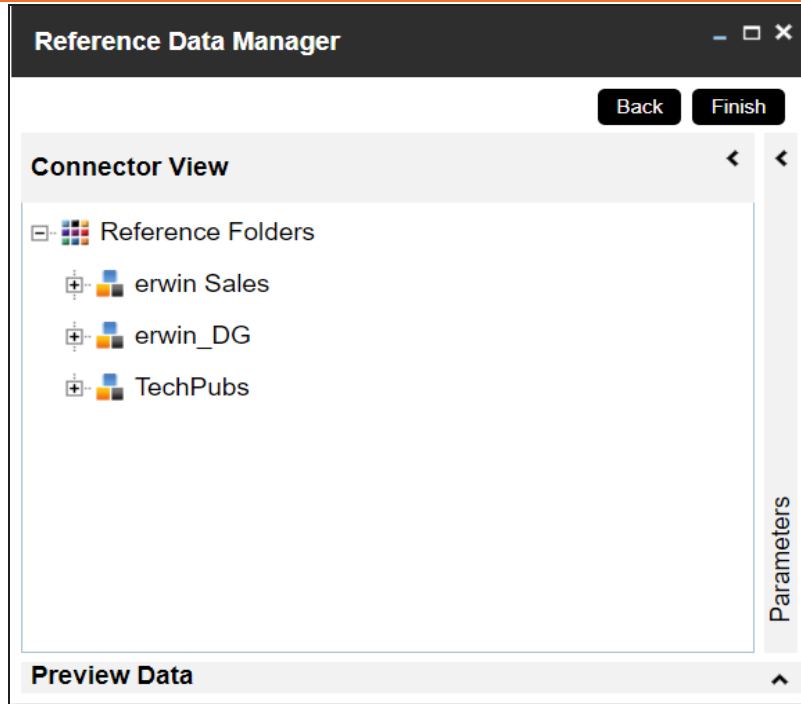
2. In the **Properties** section, click **Configure**.

The Connectors page appears.



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

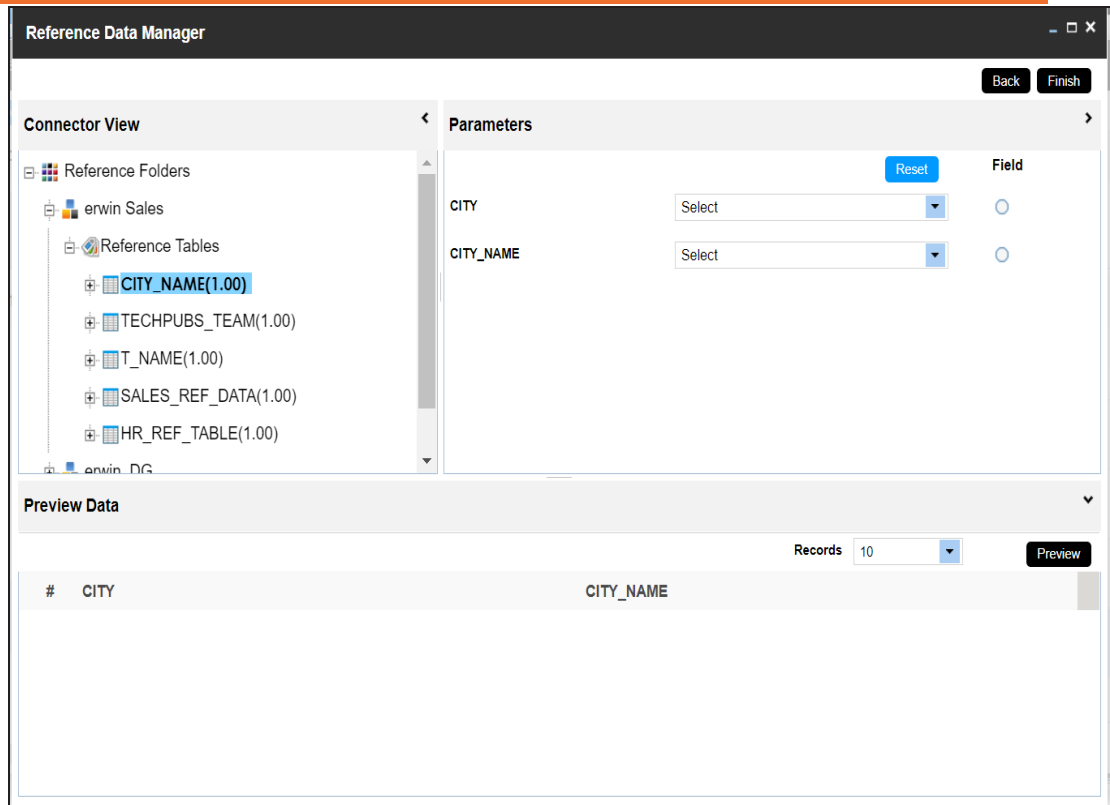
The Reference Data Manager page appears. It displays the reference folders in the Connector View pane.



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.

Adding Tasks



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.

Adding Tasks

The image shows the 'Extended Properties Configuration' window. At the top, there are 'Save', 'Cancel', and 'Delete' buttons. Below is the 'Field Controls' section with icons for Group, Text Box, Combo Box, List, Radio, Check Box, Number, Boolean, Date Picker, and Category. The 'Configure Form' section shows a 'Selected Roles Group' dropdown with 'Compliance Officer' selected, and a 'List of Cities' dropdown with 'Los Angeles' selected. A 'Radio' button is at the bottom. The 'Properties' section on the right has a table with 'Property' and 'Value' columns. The 'Load On Startup' property is set to 'Off', and the 'Visible in Extended Properties' property is set to 'On'.

Property	Value
Description	
Load On Startup	Off
Visible in Extended Properties	On

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.

The image shows the 'Configure Form' window. It has a 'Governance Responsibilities' section with a dropdown showing 'Compliance Officer'. Below it is a 'Selected Roles Group' dropdown also showing 'Compliance Officer'. Then there is a 'List of Cities' dropdown with 'Los Angeles' selected. At the bottom, there is a 'Selected City' section with a radio button and 'Los Angeles' selected.

Managing Tasks

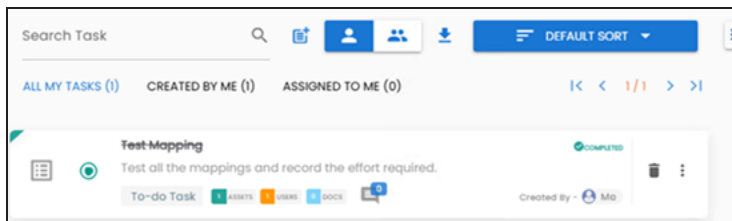
Managing tasks involves:

- 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.

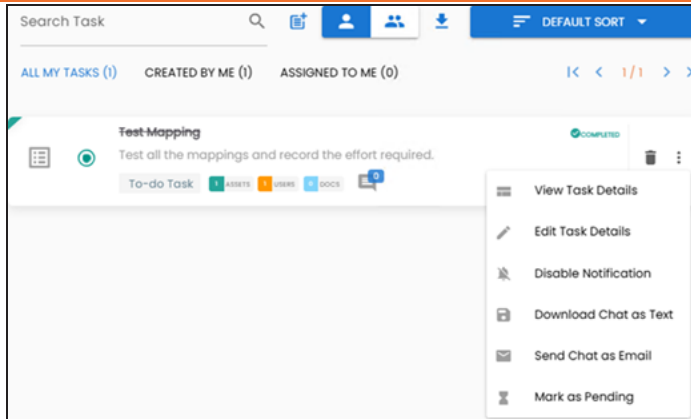


To further manage tasks, follow these steps:

1. On a task tile, click .

The available options appear.

Managing Tasks



2. Use the following options to work on tasks:

View Task Details

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

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

Edit Task Details

Use this option to update task details.

Disable Notification

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

Download Chat as Text

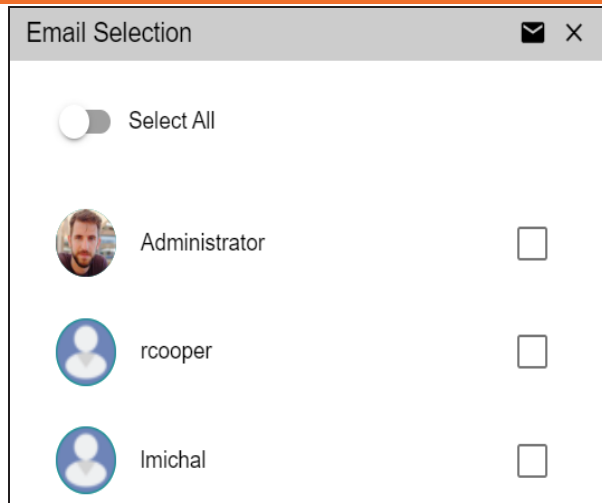
Use this option to download chat related to a task in the TXT format.


Send Chat as Email

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

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


Managing Tasks



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

Mark as Pending

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

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



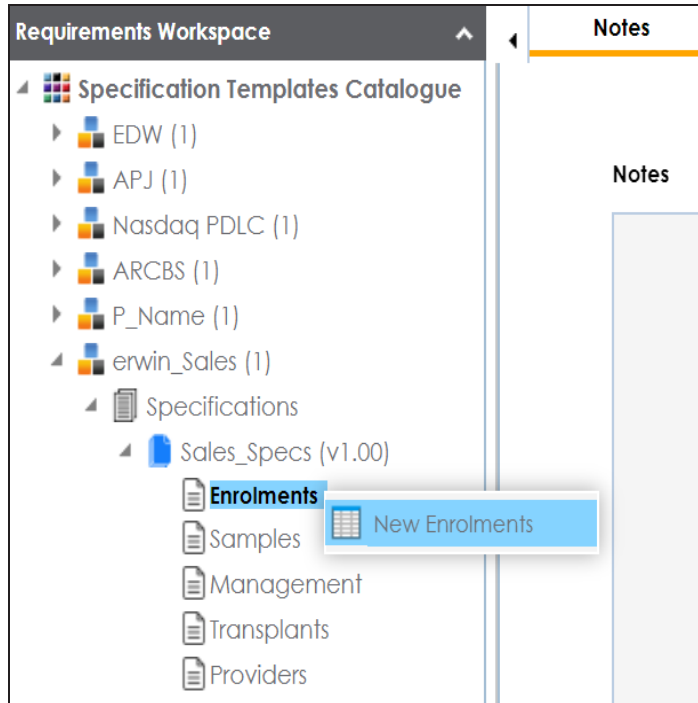
You can delete a task only if you have created it.

Creating Child Artifacts

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

To create child artifacts, follow these steps:

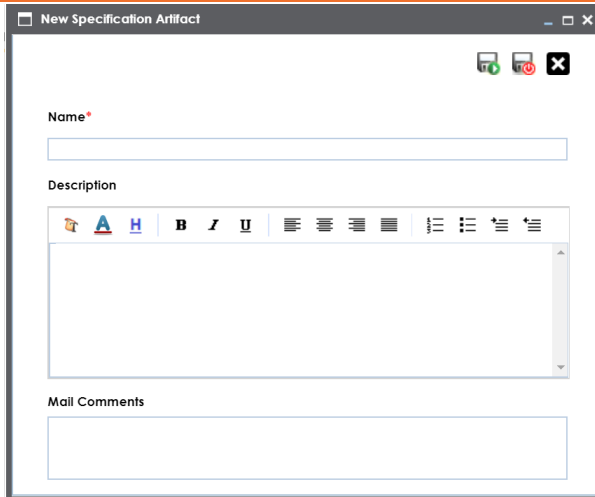
1. In the **Requirements Workspace** pane, right-click an artifact.



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

The New Specification Artifact page appears.

Creating Child Artifacts



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

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

4. Click .

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

Creating Child Artifacts

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)

Enrollments

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

Enrollments

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	Draft
Analyst	Select Analyst
Approval Date	

Summary

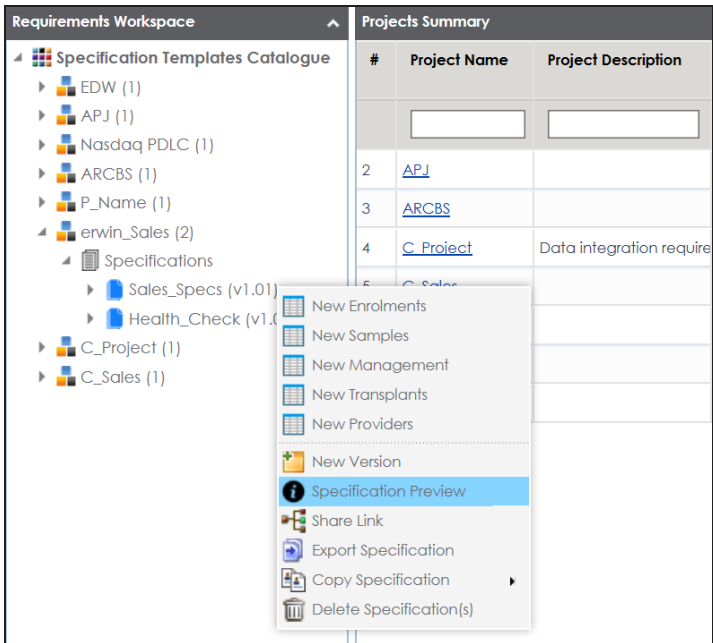
Managing Specifications

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 Versions](#) 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.

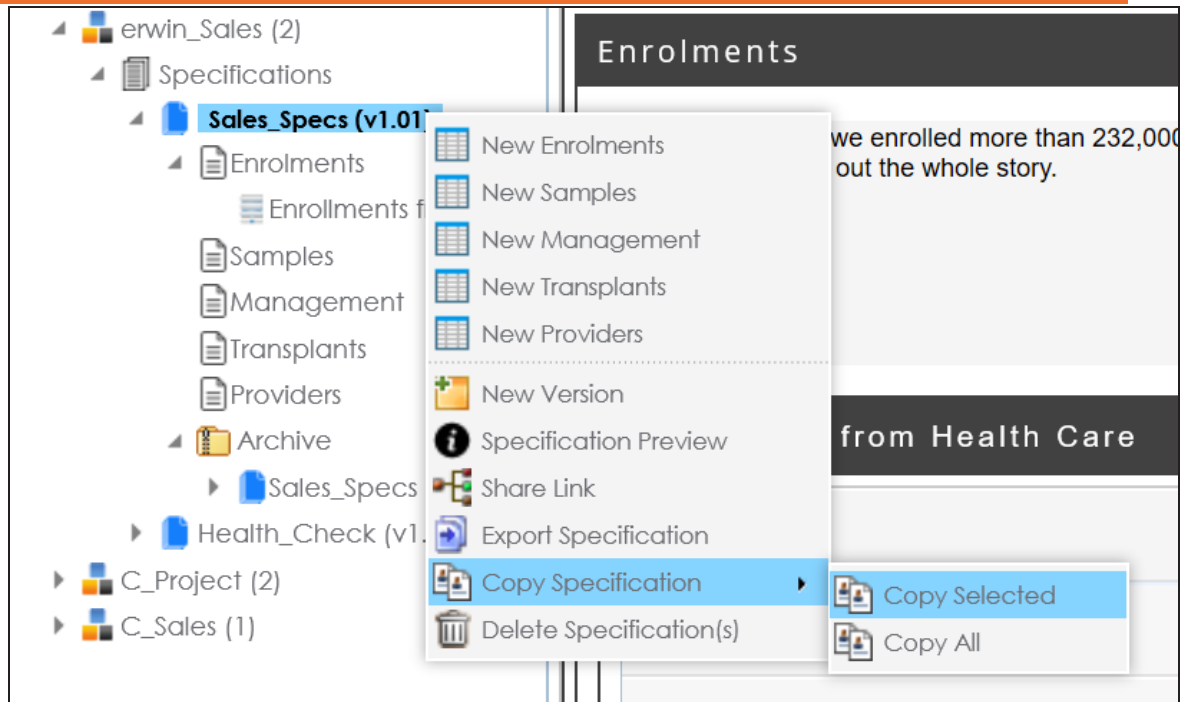
Export Specification

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.

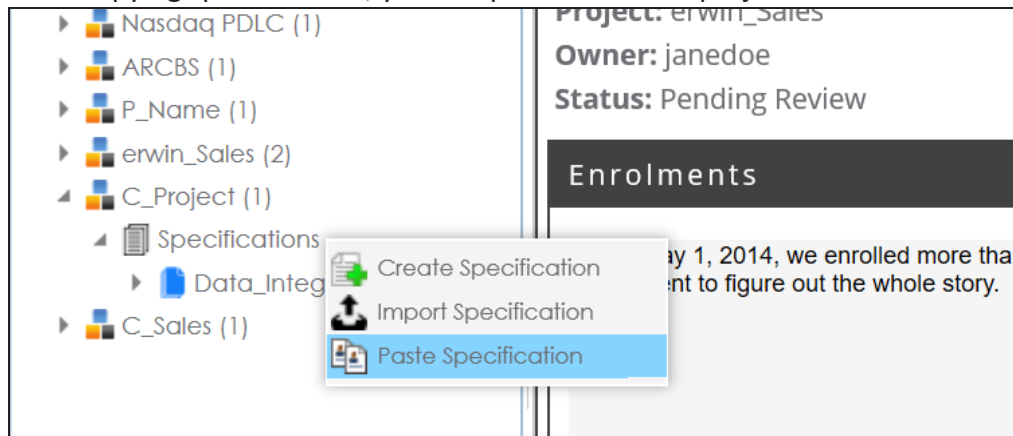
Managing Specifications



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.

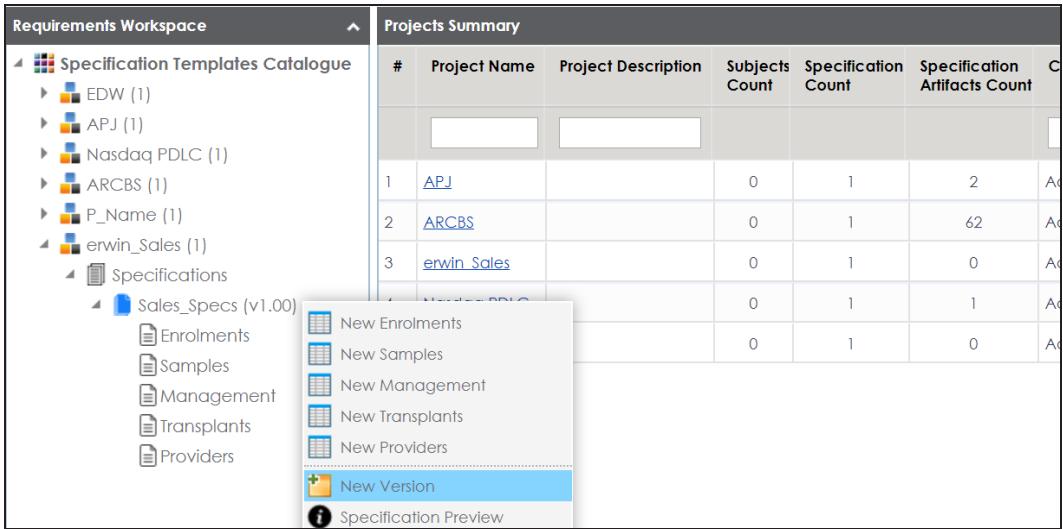
1. Click the **Specifications** node.
The specification Listing pager appears.
2. Click .
The Specification Details page appears in edit mode.
3. Update the required fields and click .
The specification is updated.

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

New Version

Specification Name
Sales_Specs

Specification Version
1.01

Version Label

Change Description*

Mail Comments

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

Field Name	Description
Specification 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.

Creating Specification Versions

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

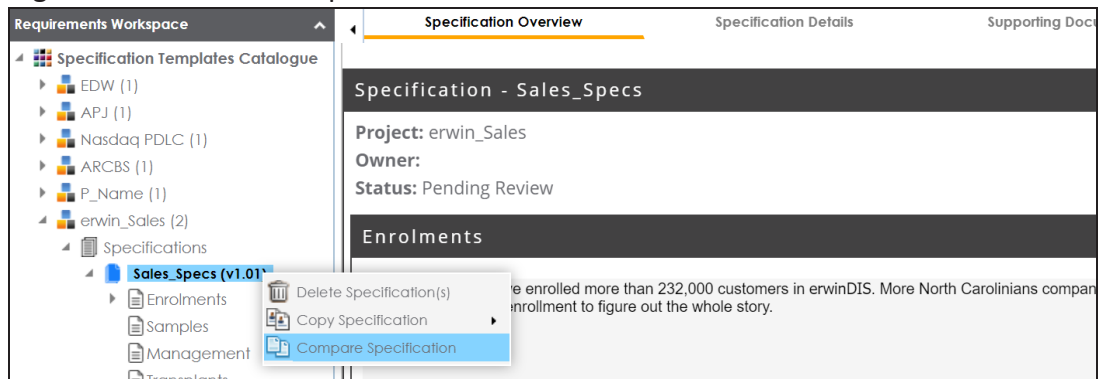
4. Click .

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

The older specification version is archived and cannot be edited.

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

1. In the **Requirements Workspace** pane, use the CTRL key to select the two versions that you want to compare.
2. Right-click the selected specification.



3. Click **Compare Specification**.

The Specification Comparison Report appears. This report displays a comparison of two specifications.

For example, the differences are highlighted in red color and unchanged details are displayed in black color. See the below image for more information.

Creating Specification Versions

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

Color Representation

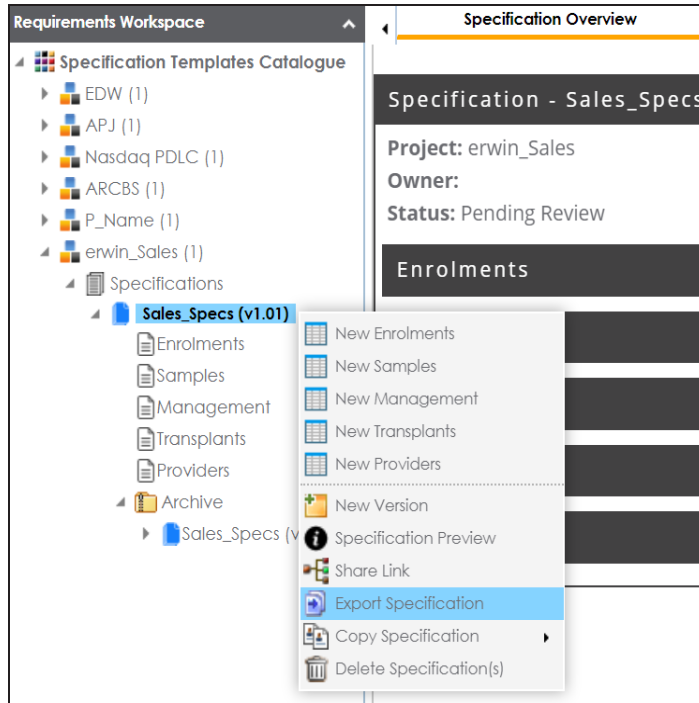
- Changed Presentation
- Unchanged Presentation

Exporting and Importing Specifications

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

To export specifications, follow these steps:

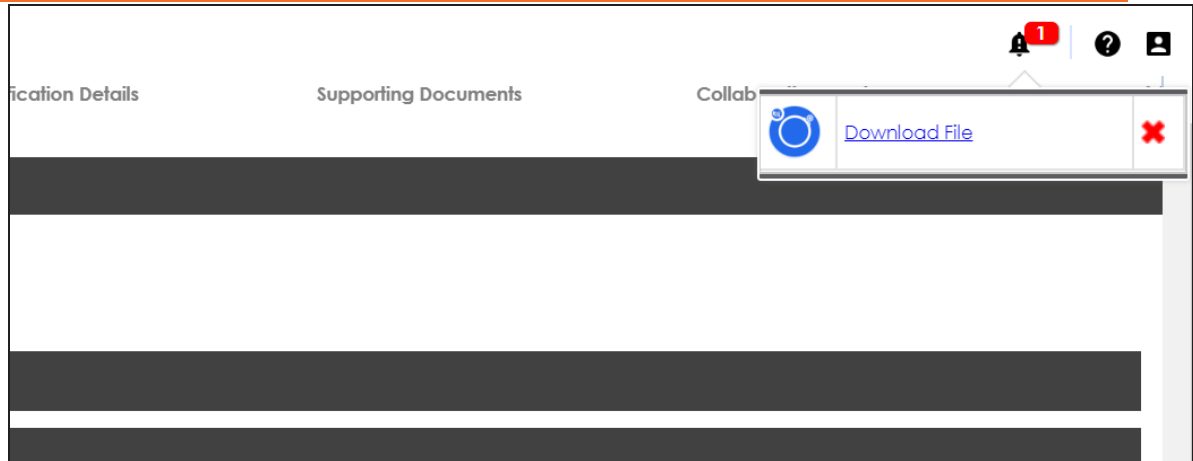
1. In the **Requirements Workspace** pane, right-click the required specification.



2. Click **Export Specification**.

The Download File hyperlink appears in the notification area.

Exporting and Importing Specifications



3. Click **Download File**.

The specification is downloaded as a .zip file.

You can create a specification by importing the exported specification.

To import a specification, follow these steps:

1. Unzip the exported specification.

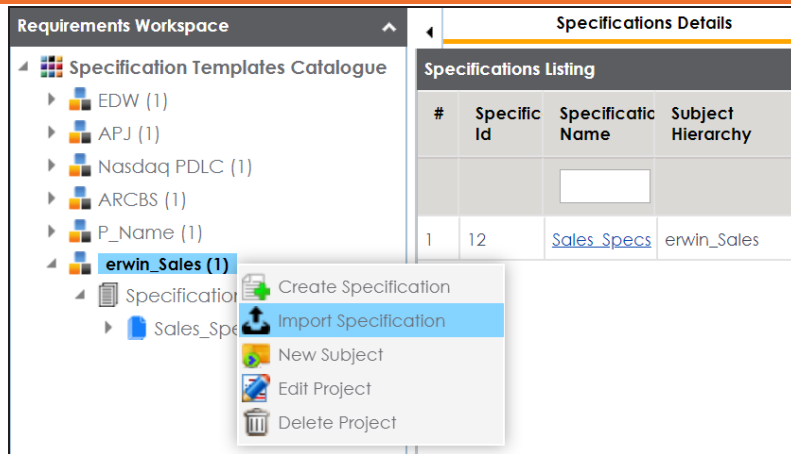
The unzipped folder contains the exported specification in the .xml format.




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

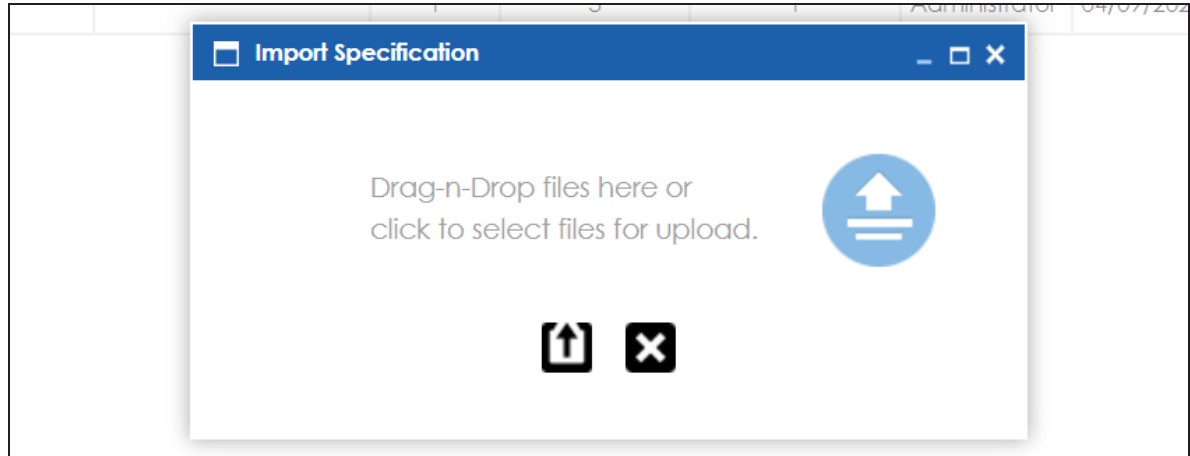
2. Go to **Application Menu > Data Catalog > Requirements Manager**.
3. In the **Requirements Manager** pane, right-click a project.

Exporting and Importing Specifications



4. Click **Import Specification**.

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



6. Click .

The specification is created and added to the Specifications tree.

Linking Requirements to Data Mappings

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

To link functional requirements to mappings, follow these steps:

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

The mapping opens in the detailed view.

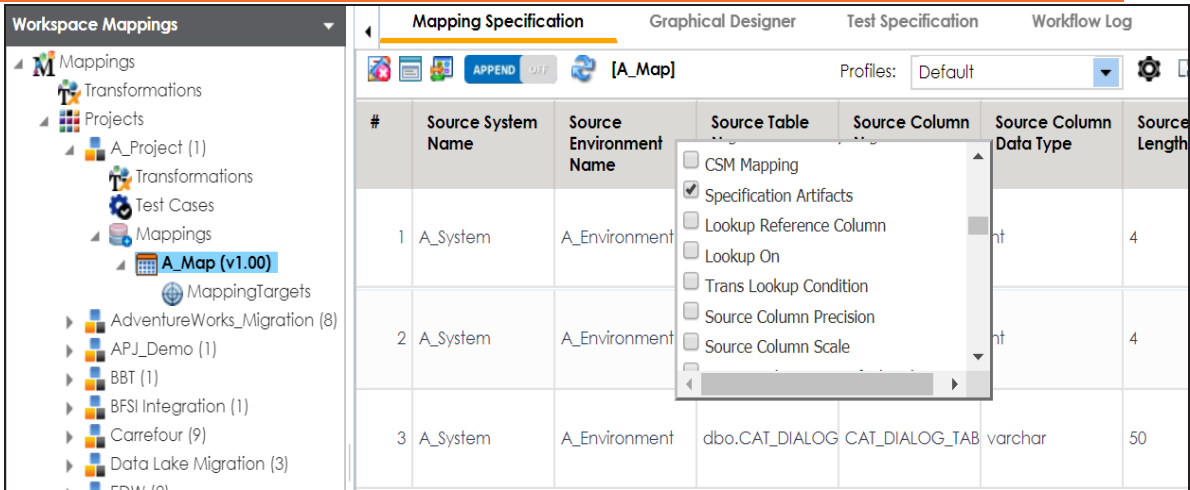
The screenshot displays the Mapping Manager interface. On the left is the 'Workspace Mappings' tree, showing a hierarchy of projects and mappings, with 'A_Map (v1.00)' selected. The main area is the 'Mapping Specification' tab, which contains a table with the following columns: #, Source System Name,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

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

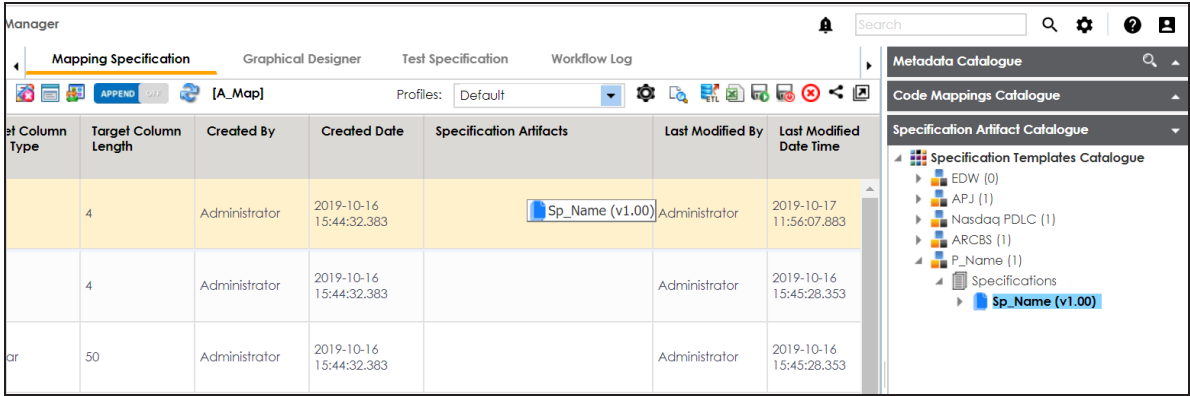
3. On the **Mapping Specification** tab, right click the grid header.


A list of header columns appears.

Linking Requirements to Data Mappings



4. Scroll down the list and select the **Specification Artifact** check box.
The specification Artifact column becomes visible on the Mapping Specification tab.
5. In the right pane, click **Specification Artifact Catalog**.
6. Expand the project that contains the required specification.
7. Drag and drop the specification on the **Specification Artifacts** column in the required row.



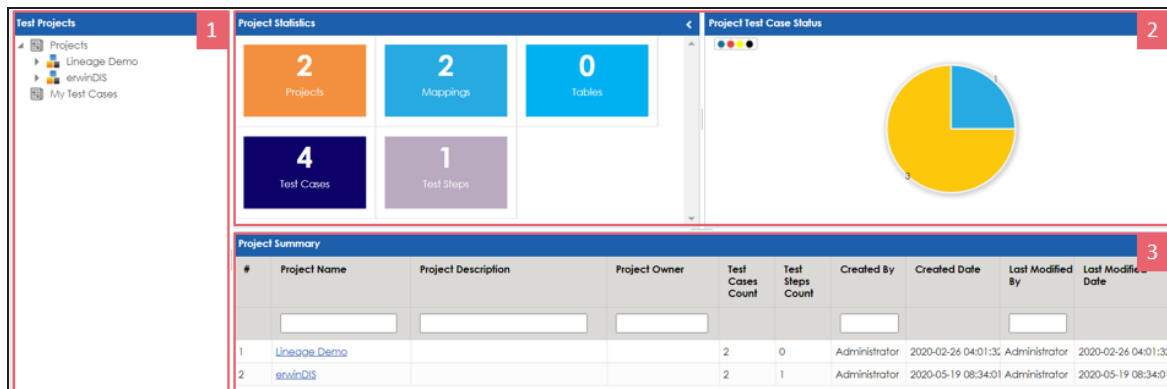
8. Click .
- Requirements are linked to the selected mapping.

Test Manager

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

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

The Test Manager dashboard appears:



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

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

Creating and Managing Test Cases

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

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

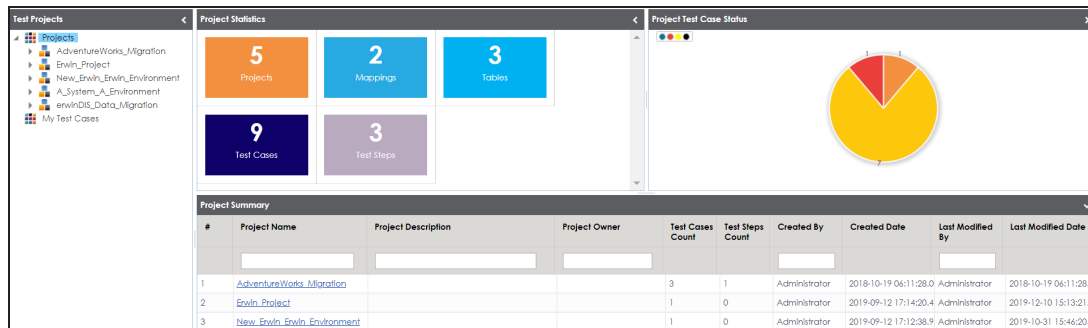
- [Creating and Managing Test Cases for Mappings](#)
- [Creating and Managing Test Cases for Tables](#)

Viewing and Analyzing Test Cases

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

To view and analyze test cases, follow these steps:

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



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

Project Statistics

Use this section to view the following information:

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

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

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

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

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

Project Test Case Status

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

Viewing and Analyzing Test Cases

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

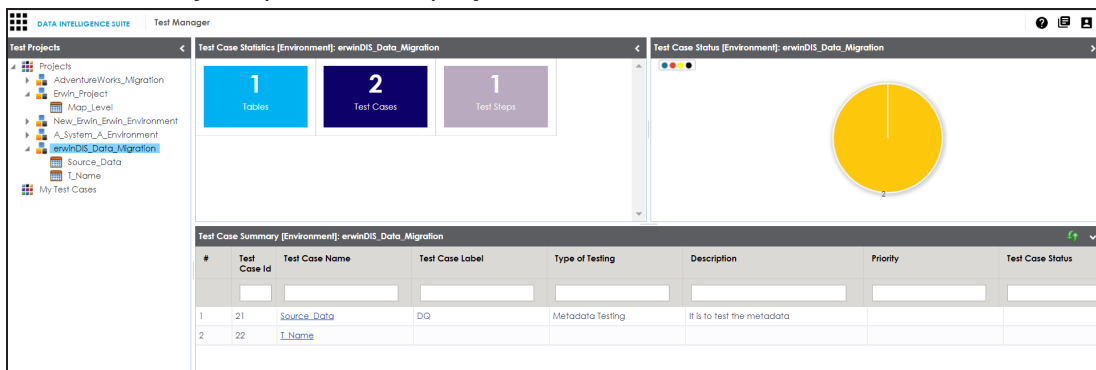
Project Summary

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

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

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

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



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

Viewing and Analyzing Test Cases

3. Click a test case to view its details.

The test case opens in a detailed view.

The screenshot displays the 'Test Case Information: Source_Data' interface. On the left, a 'Test Projects' sidebar lists various project folders, with 'Source_Data' selected. The main area is titled 'Test Case Information: Source_Data' and features three tabs: 'Test Case Overview' (active), 'Validation Steps', and 'Document Upload'. The 'Test Case Overview' tab contains the following fields:

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

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

Test Case Overview

Use this tab to view the test case details.

Validation Steps

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

Document Upload

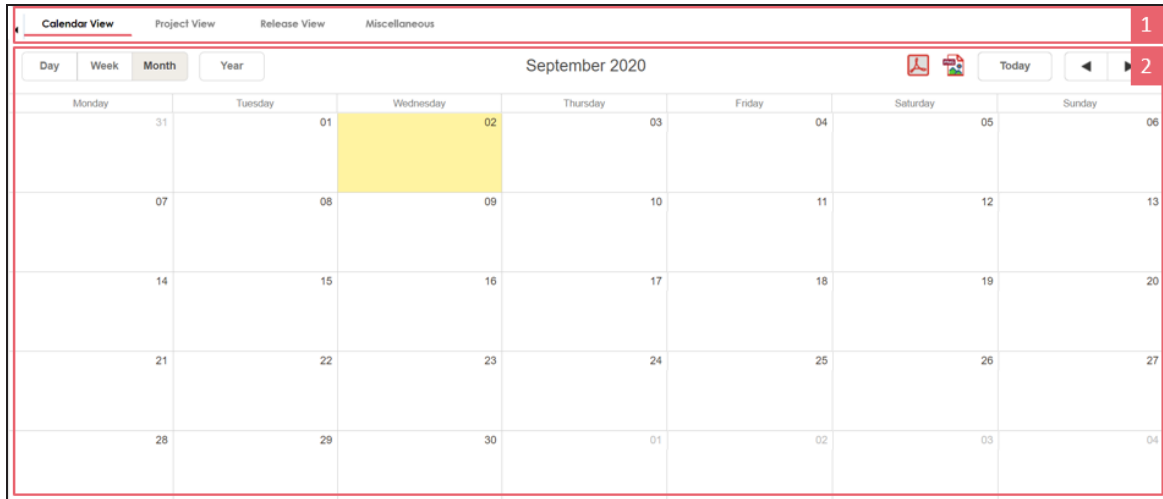
Use this tab to view the uploaded documents in the test case.

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

[illegible]

Release Manager

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



UI Section	Function
1-Browser Pane	<p>Use this pane to browse through releases and miscellaneous options. You can switch between different views to see releases:</p> <ul style="list-style-type: none"> ▪ Calendar View: Select this view to list the releases on a calendar ▪ Project View: Select this view to list the releases under a project. ▪ Release View: Select this view to list release object details under a release.
2-Bottom Pane	Use this pane to view or work on the data based on your selection in the browser pane.

Managing releases involve the following:

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

Creating Projects and Adding Releases

You can create projects and add releases to these projects.

To create projects, follow these steps:

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

The screenshot displays the 'Project View' tab in the Release Manager application. The interface is divided into several sections:

- Project Listing:** A table showing project details. The first project is 'EDW' owned by 'Kartik Sridhar' with 4 releases and 6 objects. The second project is 'New_Project' owned by 'Resource_Name' with 2 releases and 1 object.
- Project Details (EDW):** A sidebar on the right showing the project name 'EDW', a description, and resource information: 'Resource Name: Kartik Sridhar' and 'Resource Email:'.
- Release Listing for EDW:** A table showing releases for the 'EDW' project. All four releases are in 'PENDING APPROVAL' status. The releases are: 'March 31 2019 Hotfix', 'Pfizer Test', 'Release_New', and 'Test'.
- Release Summary - By Status:** A pie chart showing 100% of releases are in 'PENDING APPROVAL' status.
- Release Summary - By Owner:** A pie chart showing the distribution of releases by owner: 'jane.doe' (25%), 'ks123' (25%), and 'Unassigned' (50%).

Navigation and action buttons include 'Add Project', 'Export to Excel', 'Share', 'Add Release', 'Generate Release Plan', and 'Export to Excel'.

2. Click **Add Project**.

The New Project page appears.

Creating Projects and Adding Releases

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

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

Buttons: Save, Cancel

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

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

Creating Projects and Adding Releases

Field Name	Description
	For example, 1-800-783-7946.
Resource Email	Specifies the project owner's email address. For example, jane.doe@mauris.edu

4. Click **Save**.

The project is created and saved in the Project Listing.

To add releases to the project, follow these steps:

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

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

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

Calendar View Project View Release View Miscellaneous									
Project Listing : Add Project Export to Excel Share									
#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
	<input type="text"/>	<input type="text"/>				<input type="text"/>			
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 ⏻ Add Release Generate Release Plan Export to Excel									
#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Create Date	Last Modified Date	Options
	<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>			

2. Click **Add Release**.

The New Release page appears.

Creating Projects and Adding Releases

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


- Project Name* (dropdown menu)
- Release Name* (text input)
- Release Description (text input)
- Change Control Number (text input)
- Release Date* (date picker showing 11/28/2019)
- Release Owner (dropdown menu showing -Select-)
- User Defined Field 1 through User Defined Field 10 (text inputs)

Buttons: Save, Cancel

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

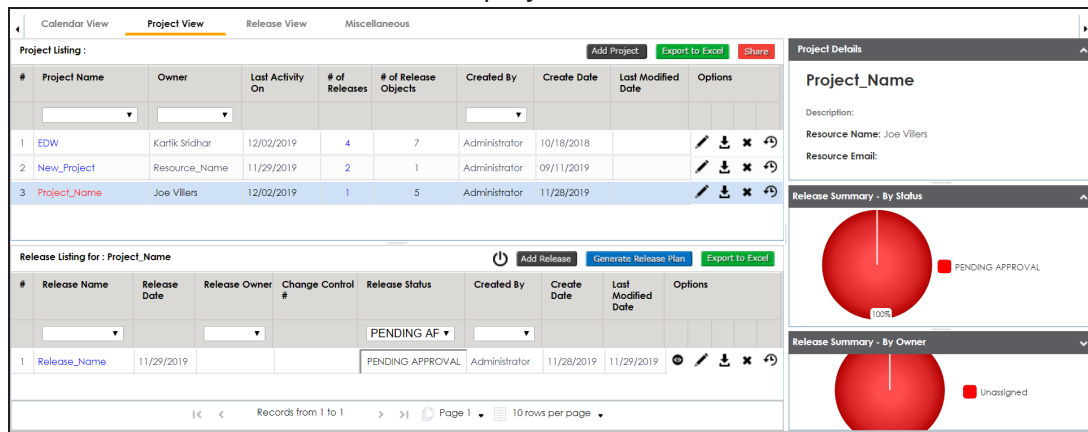
Field Name	Description
Project Name	Specifies the project name for a release. For example, EDW.
Release Name	Specifies the name of the release. For example, Pfizer Test.
Release Description	Specifies the description about the release. For example: The release contains two release objects of the data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

Creating Projects and Adding Releases

Field Name	Description
	Use  to enter the release date.
Release Owner	Specifies the release owner's User ID. For example, jdoe. 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 a software interface with a 'Project View' tab selected. 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, with the third row (Project Name) selected. Below the table is a 'Release Listing for: Project Name' section with a similar table structure, showing one release with status 'PENDING APPROVAL'. On the right, a 'Project Details' sidebar shows the project name, description, resource name (Joe Villers), and resource email. Below this, a 'Release Summary - By Status' section shows a red circle with '100%' and 'PENDING APPROVAL', and a 'Release Summary - By Owner' section shows a red circle with '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 ()

Creating Projects and Adding Releases

To download the release details, click .

Delete (✕)

To delete the release, click ✕.

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

Adding Release Objects to Releases

You can add following release objects to releases:

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



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

Adding Data Item Mappings as Release Objects

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

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

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

The release listing of the project appears.

The screenshot shows a web application interface with a top navigation bar containing 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the navigation bar, there are buttons for 'Add Project', 'Export to Excel', and 'Share'. The main content area is divided into two sections. The top section, 'Project Listing', contains a table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table has three rows: 1. EDW, Karik 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. The bottom section, 'Release Listing for: Project_Name', contains a table with columns: #, Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. The table has one row: 1. Release_Name, 11/28/2019, [blank], [blank], PENDING APPROVAL, Administrator, 11/28/2019. To the right of the tables, there is a 'Project Details' sidebar with a 'Project_Name' header, a 'Description' field, and 'Resource Name: Joe Villers' and 'Resource Email:' fields. Below this, there are two 'Release Summary' charts: 'By Status' showing a red circle with '100%' and 'PENDING APPROVAL' label, and 'By Owner' showing a red circle with '100%' and 'Unassigned' label.

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

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

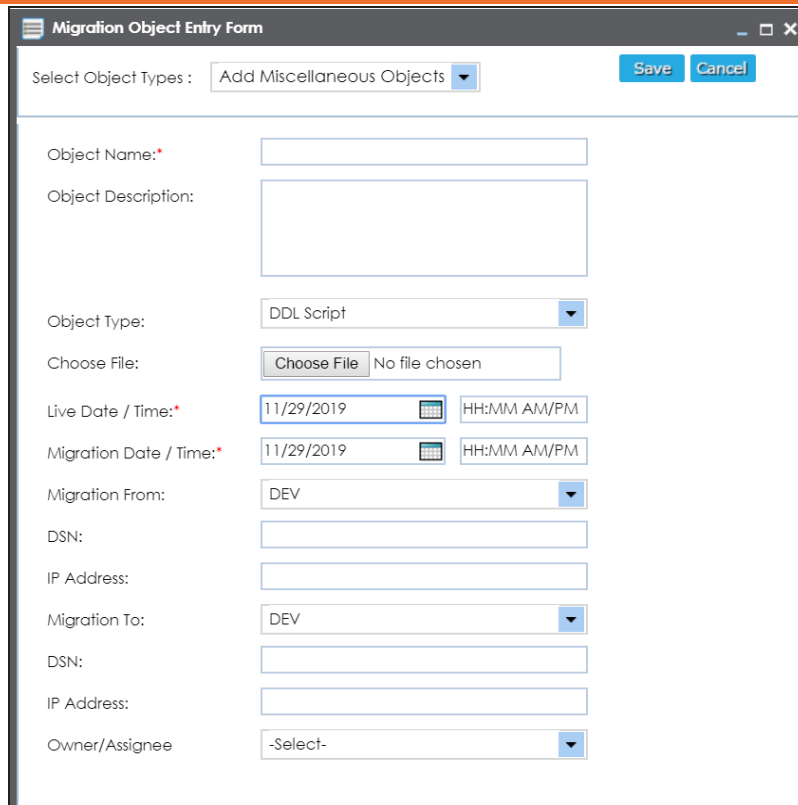
2. Click the required <Release_Name>.

The Release View page appears showing the release object details.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Adding Data Item Mappings as Release Objects

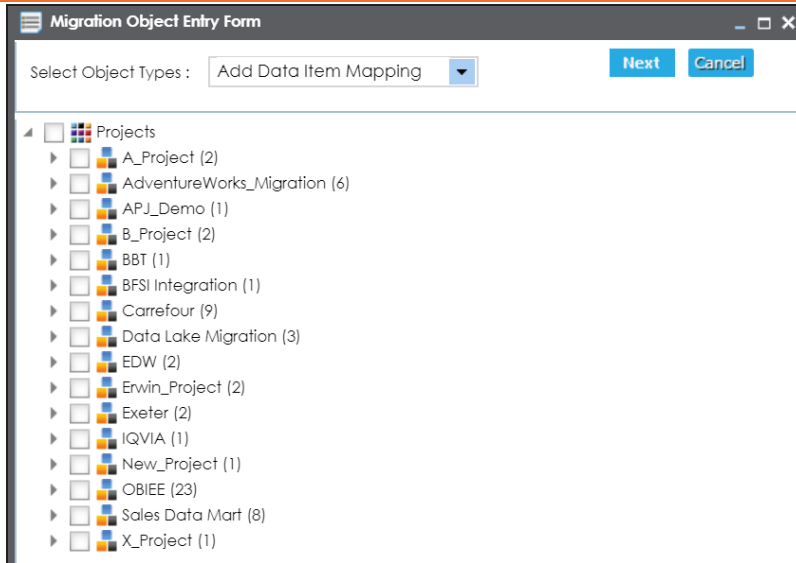


The screenshot shows a window titled "Migration Object Entry Form". At the top, there is a label "Select Object Types:" followed by a dropdown menu currently set to "Add Miscellaneous Objects". To the right of this are "Save" and "Cancel" buttons. Below this header, the form contains several fields: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

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

The following page appears.

Adding Data Item Mappings as Release Objects

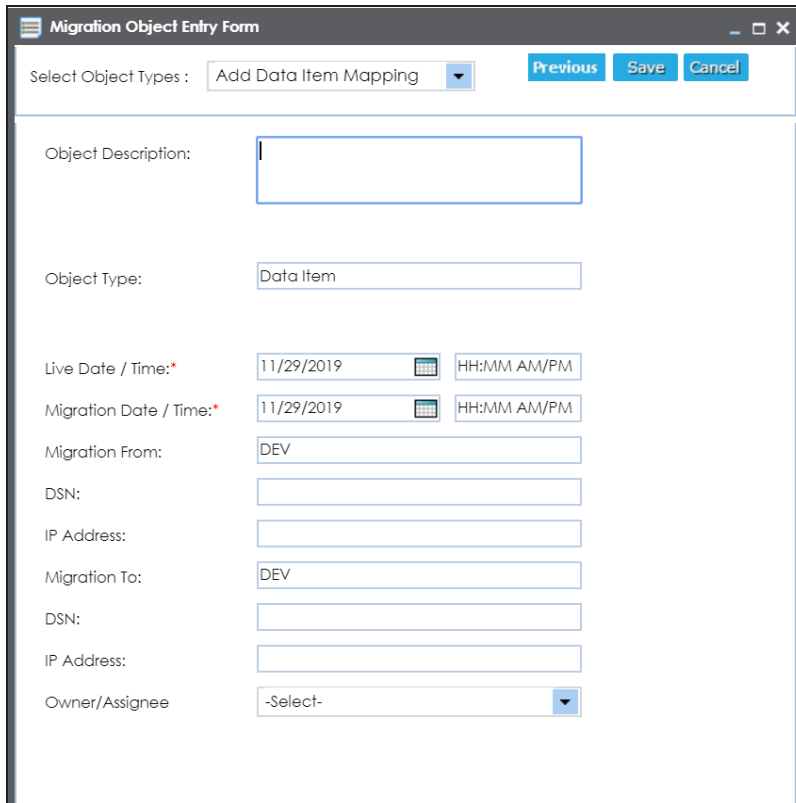


The screenshot shows the 'Migration Object Entry Form' window. At the top, there is a 'Select Object Types:' dropdown menu with 'Add Data Item Mapping' selected. To the right of this menu are 'Next' and 'Cancel' buttons. Below the menu is a tree view of projects. The 'Projects' folder is expanded, showing a list of projects with their respective counts in parentheses:

- 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 again, but now with the 'Add Data Item Mapping' page. The 'Select Object Types:' dropdown menu still has 'Add Data Item Mapping' selected. To the right of this menu are 'Previous', 'Save', and 'Cancel' buttons. Below the menu, there are several input fields:

- Object Description: A text input field.
- Object Type: A dropdown menu with 'Data Item' selected.
- Live Date / Time: A date and time input field with a calendar icon, showing '11/29/2019' and 'HH:MM AM/PM'.
- Migration Date / Time: A date and time input field with a calendar icon, showing '11/29/2019' and 'HH:MM AM/PM'.
- Migration From: A text input field with 'DEV' entered.
- DSN: A text input field.
- IP Address: A text input field.
- Migration To: A text input field with 'DEV' entered.
- DSN: A text input field.
- IP Address: A text input field.
- Owner/Assignee: A dropdown menu with '-Select-' selected.

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	<p>Specifies the description about the release object being added to the release.</p> <p>For example: The release object is a data item mapping under the Data-warehouse project.</p>
Live Date / Time	<p>Specifies the live date and time of the release object.</p> <p>For example, 04/03/2020 9:30 AM.</p> <p>Live Date is autopopulated and it is same as the release date.</p> <p>Enter the Live Time in HH : MM format.</p>
Migration Date / Time	<p>Specifies the migration date and time of the release object from the DEV release environment.</p> <p>For example, 04/30/2020 9:30 PM.</p> <p>Use  to enter the migration date. Enter the migration time in the HH : MM format.</p> <p>The Migration Date cannot exceed the Live Date.</p>
Migration From	<p>Specifies the current release environment of the release object.</p> <p>This field is set to DEV by default.</p>
DSN	<p>Specifies the DSN name from where the release object is being migrated.</p> <p>For example, ErwinDIS931.</p>
IP Address	<p>Specifies the IP Address from where the release object is being migrated.</p> <p>For example, 10.32.445.21</p>
Migration To	<p>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.</p>
DSN	<p>Specifies the DSN name to which the release object is being migrated.</p>

Adding Data Item Mappings as Release Objects

Field Name	Description
	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 Manager. For more information on creating users, refer to the Creating Users and Assigning Roles topic.

7. Click **Save**.

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

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

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

8. Use the following options:

Edit (✎)

To edit the release object, click ✎.

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



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

Information (i)

To view the mapping information, click i.

Adding Data Item Mappings as Release Objects

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.

The screenshot shows the 'Project View' tab in the Release Manager. The 'Project Listing' table is displayed with 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 table, the 'Release Listing for: Project_Name' is shown with a table of releases:

#	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, the 'Project Details' panel shows information for 'Project_Name', including a description, resource name (Joe Villers), and resource email. Below this, two 'Release Summary' charts are shown: 'By Status' (100% PENDING APPROVAL) and 'By Owner' (100% Unassigned).

2. Click the required <Release_Name>.

The Release View tab appears.

The screenshot shows the 'Release View' tab in the Release Manager. The 'Release_Name' details are shown on the left, including a calendar view for Nov 2019, description, change control #, and release owner. The 'Release Summary' section shows three charts: 'By Status' (100% PENDING APPROVAL-1), 'By Owner' (100% Unassigned - 1), and 'By Type' (100% Data Item - 1). Below this, the 'Release Object Details' table is displayed with the following data:

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

Promoting Data Item Mappings

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

The Promote Data Item Mappings page appears.

Promote Data Item Mappings

Data Item Repository < Promotion Details

Data Mapping Objects

Erwin_Map

Promote To TEST Effective Date

Version Label

Publish Notes*

B I U

Change Description*


B I U

Publish To Project -select-

Publish To Subject -select-

Validate

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.

Promoting Data Item Mappings

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

6. Click **Validate**.

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

Promote Data Item Mappings

Data Item Repository

- Data Mapping Objects
 - Erwin_Map

Promotion Details

Promote To: TEST Effective Date: 11/29/2019 [Validate]

Version Label: [Text Box]

Publish Notes* [Rich Text Editor: The data item mappings can be promoted to Test environment.]

Change Description* [Rich Text Editor: The mappings will be moved to corresponding test environment.]

Promotion Error Report

SNo	Failed Environments	System Environments
1	erwinDIS.erwinDIS	select any environment
2	New_Erwin.Erwin_Environment	select any environment

Promoting Data Item Mappings

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

The screenshot shows the 'Promotion Details' window. On the left, the 'Data Item Repository' pane shows 'Data Mapping Objects' and 'Erwin_Map'. The main area has fields for 'Promote To' (TEST), 'Effective Date' (11/29/2019), 'Version Label', 'Publish Notes', and 'Change Description'. Below these is a 'Promotion Error Report' table.

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

- Click **Save**.

The promote system environments are assigned.

The screenshot shows the 'Promotion Details' window after clicking 'Save'. The 'Promotion Error Report' table is no longer visible. Instead, a 'Success Message' is displayed at the bottom right: 'Promote Environments Successfully Assigned'.

- Click **Validate**.

The promotion is successfully validated.

Promoting Data Item Mappings

The screenshot shows a software interface for promoting data item mappings. On the left, a tree view shows 'Data Mapping Objects' and 'Erwin_Map'. The main area has a 'Promote To' dropdown set to 'TEST' and an 'Effective Date' of '11/29/2019'. There are 'Validate' and 'Promote' buttons. Below these are text areas for 'Version Label', 'Publish Notes', and 'Change Description', each with a rich text editor toolbar. The 'Publish Notes' and 'Change Description' areas contain the text: 'The data item mappings can be promoted to Test environment.' and 'The mappings will be moved to corresponding test environment.' respectively. At the bottom right, a status message reads 'Successfully Validated'.

10. Click **Promote**.

The object is promoted to the selected project.



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

Adding Codeset as Release Objects

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

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

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

The release listing of the required project appears.

The screenshot displays the 'Project View' tab in a software interface. 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. Three projects are listed: EDW, New_Project, and Project_Name. The 'Project_Name' row is selected. To the right, the 'Project Details' panel shows information for 'Project_Name', including Description, Resource Name (Joe Villers), and Resource Email. Below this, two circular progress indicators are shown: 'Release Summary - By Status' (100% PENDING APPROVAL) and 'Release Summary - By Owner' (100% Unassigned). At the bottom, a 'Release Listing for : Project_Name' table is visible, showing a single release named 'Release_Name' with a status of 'PENDING APPROVAL'.

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

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

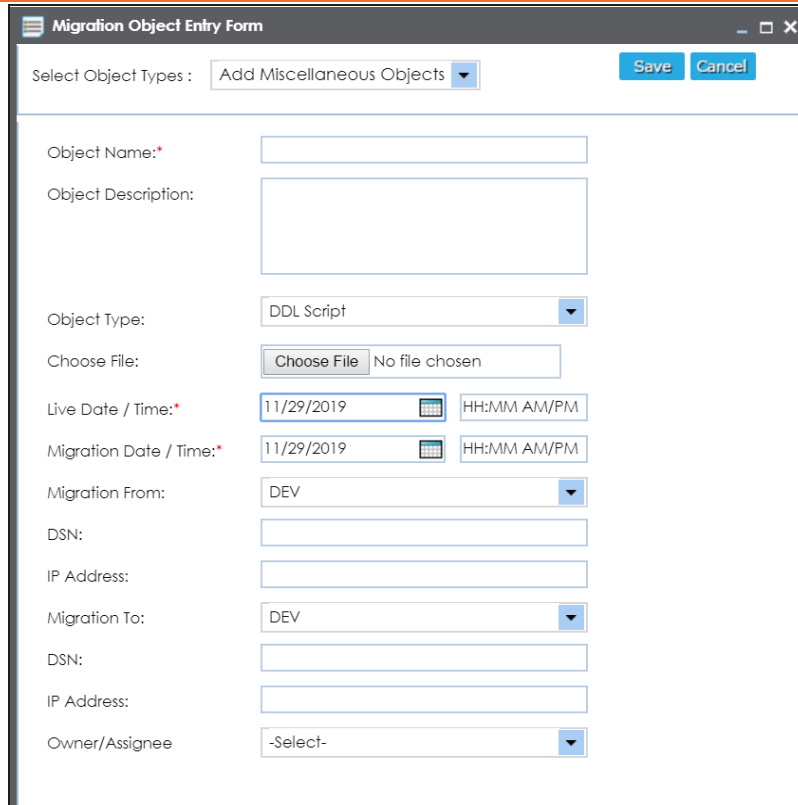
2. Click the required <Release_Name>.

The Release View page appears.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Adding Codeset as Release Objects

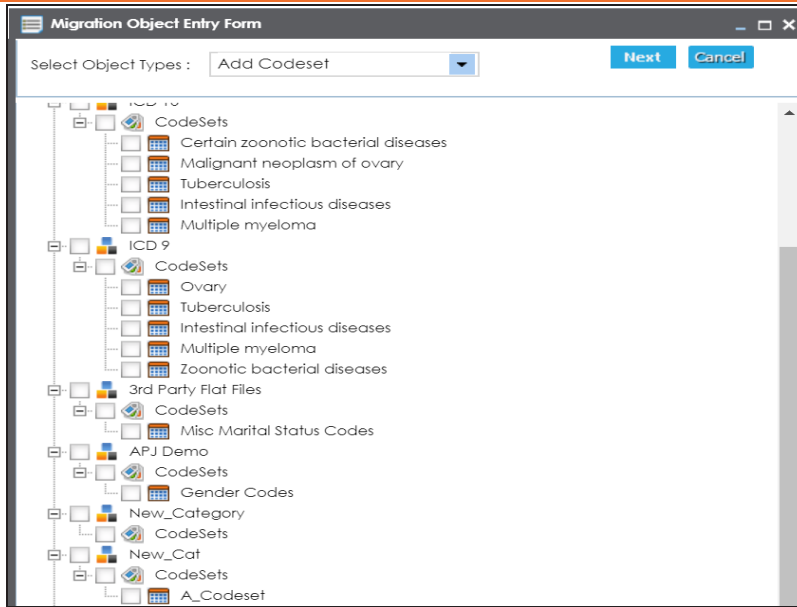


The screenshot shows a web-based form titled "Migration Object Entry Form". At the top, there is a "Select Object Types:" dropdown menu currently set to "Add Miscellaneous Objects", with "Save" and "Cancel" buttons to its right. The form contains several input fields and dropdowns: "Object Name:" (text box), "Object Description:" (text area), "Object Type:" (dropdown menu showing "DDL Script"), "Choose File:" (button labeled "Choose File" and text "No file chosen"), "Live Date / Time:" (date and time pickers showing "11/29/2019" and "HH:MM AM/PM"), "Migration Date / Time:" (date and time pickers showing "11/29/2019" and "HH:MM AM/PM"), "Migration From:" (dropdown menu showing "DEV"), "DSN:" (text box), "IP Address:" (text box), "Migration To:" (dropdown menu showing "DEV"), "DSN:" (text box), "IP Address:" (text box), and "Owner/Assignee:" (dropdown menu showing "-Select-").

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

The following page appears.

Adding Codeset as Release Objects




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

The Migration Object Entry Form page reappears.

The screenshot shows the 'Migration Object Entry Form' window after clicking 'Next'. The 'Select Object Types' dropdown menu is still set to 'Add Codeset'. To the right of this menu are 'Previous', 'Save', and 'Cancel' buttons. Below the menu, the form contains several input fields: 'Object Description' (a text box), 'Object Type' (a dropdown menu set to 'Code Set'), 'Live Date / Time:*' (a date and time picker set to 11/29/2019), 'Migration Date / Time:*' (a date and time picker set to 11/29/2019), 'Migration From:' (a dropdown menu set to 'DEV'), 'DSN:' (a text box), 'IP Address:' (a text box), 'Migration To:' (a dropdown menu set to 'DEV'), 'DSN:' (a text box), 'IP Address:' (a text box), and 'Owner/Assignee' (a dropdown menu set to '-Select-').

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

Adding Codeset as Release Objects

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

Adding Codeset as Release Objects

Field Name	Description
	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 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.

The screenshot shows the Release Manager interface. The 'Release View' tab is selected. The sidebar on the left shows a calendar for November 2019, with the 29th highlighted. The main area displays three release summaries: 'Release Summary - By Status', 'Release Summary - By Owner', and 'Release Summary - By Type'. Below these is a table of release objects.

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

8. Use the following options:

Edit (✎)

To edit, the release object, click ✎.

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

Information (i)

To view the mapping information, click i.

Adding Codeset as Release Objects

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.

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. The 'Project_Name' row is highlighted. Below the table, there is a 'Release Listing for : Project_Name' section with a table showing release details, including Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. The 'Release Name' row is highlighted. To the right of the tables, there is a 'Project Details' panel showing the project name, description, resource name, and resource email. Below this, there are two 'Release Summary - By Status' and 'Release Summary - By Owner' sections, each containing a pie chart and a legend.

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

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

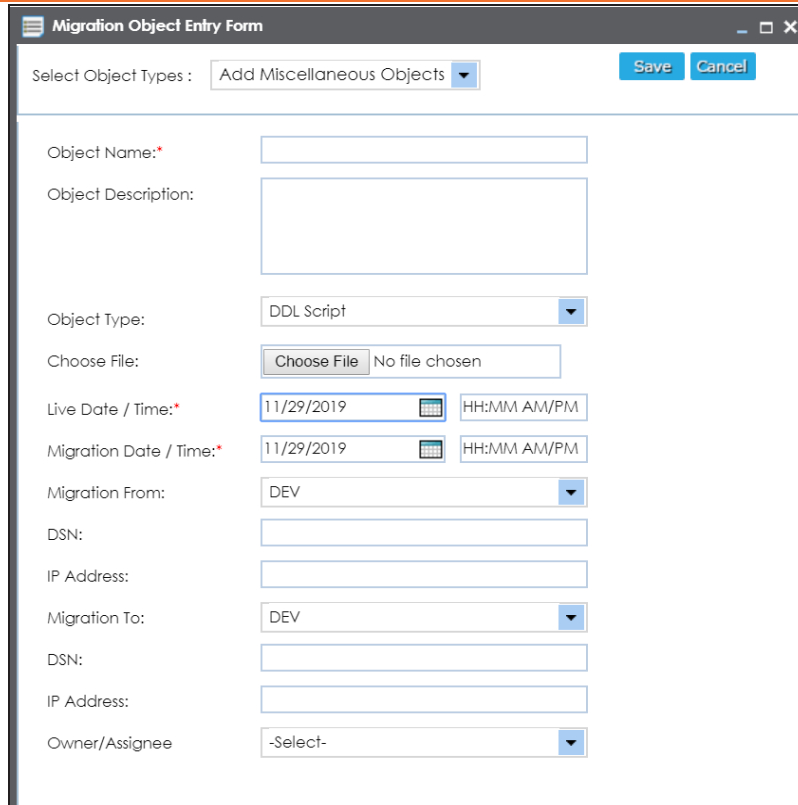
2. Click the required <Release_Name>.

The Release View page appears showing the release object details.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Adding Code Mappings as Release Objects

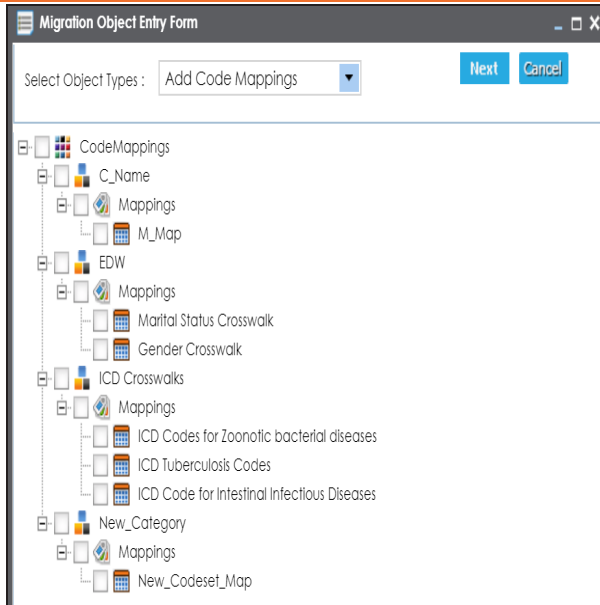


The screenshot shows a web application window titled "Migration Object Entry Form". At the top, there is a "Select Object Types:" label followed by a dropdown menu currently set to "Add Miscellaneous Objects". To the right of this are "Save" and "Cancel" buttons. Below this header, the form contains several input fields and dropdowns arranged in two columns. The left column includes "Object Name:" (a text box), "Object Description:" (a larger text box), "Object Type:" (a dropdown menu set to "DDL Script"), "Choose File:" (a button labeled "Choose File" and the text "No file chosen"), "Live Date / Time:" (a date/time picker set to "11/29/2019" with a "HH:MM AM/PM" label), "Migration Date / Time:" (another date/time picker set to "11/29/2019" with a "HH:MM AM/PM" label), "Migration From:" (a dropdown menu set to "DEV"), "DSN:" (a text box), "IP Address:" (a text box), "Migration To:" (a dropdown menu set to "DEV"), "DSN:" (a text box), "IP Address:" (a text box), and "Owner/Assignee:" (a dropdown menu set to "-Select-"). The right column contains empty text boxes for "Object Name:", "Object Description:", "DSN:", "IP Address:", and "DSN:", and empty text boxes for "IP Address:" and "Owner/Assignee:".

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

The following page appears.

Adding Code Mappings as Release Objects



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


The Migration Object Entry Form page reappears.

The screenshot shows the 'Migration Object Entry Form' window after clicking 'Next'. The 'Select Object Types' dropdown is still set to 'Add Code Mappings'. The 'Previous', 'Save', and 'Cancel' buttons are now visible. The form contains the following fields:

- Object Description: A text input field.
- Object Type: A dropdown menu set to 'Code Map'.
- Live Date / Time: A date and time input field with a calendar icon, showing '11/29/2019' and 'HH:MM AM/PM'.
- Migration Date / Time: A date and time input field with a calendar icon, showing '11/29/2019' and 'HH:MM AM/PM'.
- Migration From: A dropdown menu set to 'DEV'.
- DSN: A text input field.
- IP Address: A text input field.
- Migration To: A dropdown menu set to 'DEV'.
- DSN: A text input field.
- IP Address: A text input field.
- Owner/Assignee: A dropdown menu set to '-Select-'.

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

Adding Code Mappings as Release Objects

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

Adding Code Mappings as Release Objects

Field Name	Description
	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 Manager. For more information on creating users, refer to the Creating Users and Assigning Roles topic.

7. Click **Save**.

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

The screenshot shows the 'Release View' interface. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View' (selected), and 'Miscellaneous'. Below the tabs, there are dropdowns for 'Select Project*' and 'Select Release*', and buttons for 'Add Release', 'Edit Release', 'Generate Release Plan', 'Activity Log', 'Delete Release', and 'Share'. The main area displays 'Release Name' with a description, change control number, and release owner. To the right, there are three pie charts: 'Release Summary - By Status' (showing 'PENDING APPROVAL - 5'), 'Release Summary - By Owner' (showing 'Unassigned - 5'), and 'Release Summary - By Type' (showing a breakdown of object types). Below these, there is a 'Release Object Details' section with a table of objects.

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

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 (↓)

Adding Code Mappings as Release Objects

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 shows the Release Manager interface with the 'Project View' tab selected. The main table, 'Project Listing', has columns for Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The third row, 'Project_Name', is highlighted. Below this, a 'Release Listing for : Project_Name' table shows releases for the selected project, with columns for Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. The first row, 'Release_Name', has a status of 'PENDING APPROVAL'. The right sidebar contains '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.

Adding Miscellaneous Objects

Field Name	Description
	You can add object type in the Release Manager Settings.
Choose File	Specifies the physical file being attached to the release object. 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.

Adding Miscellaneous Objects

Field Name	Description
	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 Manager. For more information on creating users, refer to the Creating Users and Assigning Roles topic.

6. Click **Save**.

The release object is added to the release.

The screenshot shows the 'Release View' interface. At the top, there are tabs for 'Calendar View', 'Project View', 'Release View' (selected), and 'Miscellaneous'. Below the tabs, there are dropdowns for 'Select Project*' and 'Select Release*', and buttons for 'Add Release', 'Edit Release', 'Generate Release Plan', 'Activity Log', 'Delete Release', and 'Share'. The main area displays 'Release Name' with a description, change control number, and release owner. Below this, 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, DDL Script - 1). At the bottom, there is a 'Release Object Details' table with columns for Object Name, Object Status, Type, Version, Date/Time, Migration Details, Owner, Created By, Create Date, and Options. The table lists four objects: K_New_Mapping, Erwin_Map, Sales_Codeset, and Object_Name, all with a status of PENDING APPROVAL.

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 ↓.

Adding Miscellaneous Objects

Email (✉)

To send email notification about the release object click ✉.

Delete (✕)

To delete the release object, click ✕.

Moving Release Objects

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



You cannot move a data item mapping object.

To move release objects, follow these steps:

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

The release listing of the required project appears.

The screenshot shows the 'Project View' tab with a table of projects. The selected project is 'Project_Name' by Joe Villers. Below the table, the 'Release Listing for: Project_Name' is shown, listing releases like 'Release_Name' with status 'PENDING APPROVAL'. On the right, 'Project Details' for 'Project_Name' are shown, including description, resource name, and email. Below that, two pie charts show 'Release Summary - By Status' (100% PENDING APPROVAL) and 'Release Summary - By Owner' (100% Unassigned).

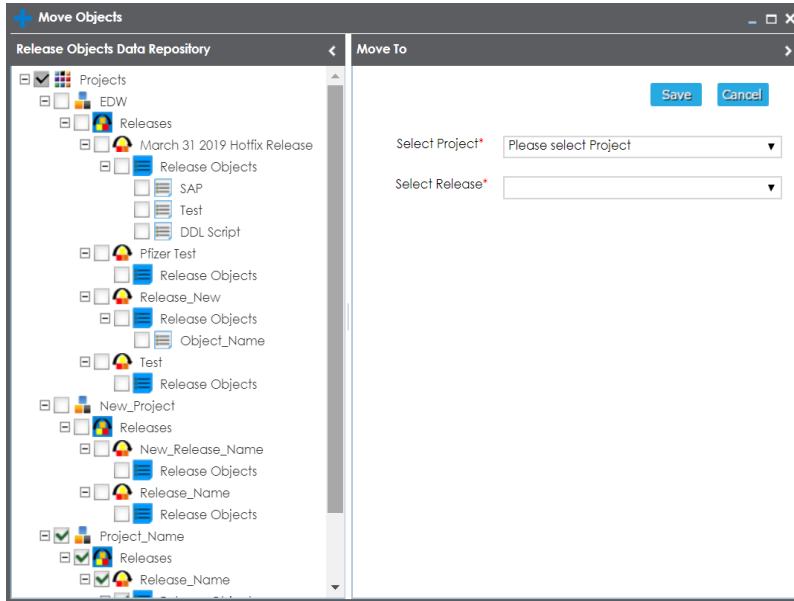
2. Click the required **<Release Name>**.

The Release View page appears showing the release object details.

The screenshot shows the 'Release View' page for 'Release_Name'. It includes a calendar view for Nov 2019, a 'PENDING APPROVAL' status, and a 'Release Summary' section with three pie charts: 'By Status' (100% PENDING APPROVAL), 'By Owner' (100% Unassigned), and 'By Type' (40% Code Map, 20% Code Set, 20% Item, 20% Script). Below, the 'Release Object Details' table lists objects like 'K_New_Mapping', 'Erwin_Map', and 'Sales_Codeset' with their status, type, version, and migration 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.

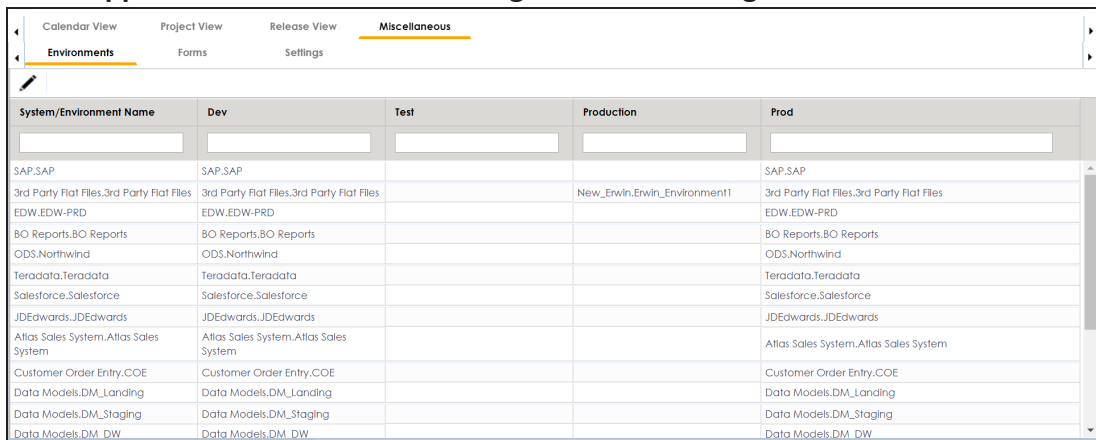
Sorting Projects and Releases

You can sort project listing in the Project View by:

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

To sort projects, follow these steps:

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



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


- Click **Settings**.

The following page appears.

Sorting Projects and Releases

The screenshot shows a web interface with a top navigation bar containing 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. Below this is a sub-navigation bar with 'Environments', 'Forms', and 'Settings'. The 'Settings' page has a pencil icon at the top left. It contains two main sections: 'Project Sorting By' and 'Release Sorting By'. Each section has a list of radio buttons for 'Sorting By' and a separate section for 'Sorting On' with two radio buttons.

Section	Sorting By Options	Sorting On Options
Project Sorting By	<input checked="" type="radio"/> Project Name <input type="radio"/> Owner <input type="radio"/> Created Date <input type="radio"/> Last Modified Date	<input checked="" type="radio"/> Asc <input type="radio"/> Desc
Release Sorting By	<input checked="" type="radio"/> Release Name <input type="radio"/> Owner <input type="radio"/> Release Status <input type="radio"/> Release Date <input type="radio"/> Created Date <input type="radio"/> Last Modified Date	<input checked="" type="radio"/> Asc <input type="radio"/> 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 a web application interface with a top navigation bar containing 'Calendar View', 'Project View', 'Release View', and 'Miscellaneous'. Below this is a sub-navigation bar with 'Environments', 'Forms', and 'Settings'. The 'Settings' tab is active. On the left, there is a 'Project Sorting By' section with a pencil icon. It contains a list of options: 'Project Name' (selected), 'Owner', 'Created Date', and 'Last Modified Date'. Below this is a 'Sorting On' section with 'Asc' (selected) and 'Desc'. On the right, there is a 'Release Sorting By' section with a pencil icon. It contains a list of options: 'Release Name' (selected), 'Owner', 'Release Status', 'Release Date', 'Created Date', and 'Last Modified Date'. Below this is a 'Sorting On' section with '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.