erwin Data Intelligence Suite

Life Cycle Management Guide

Release v10.0

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Contents

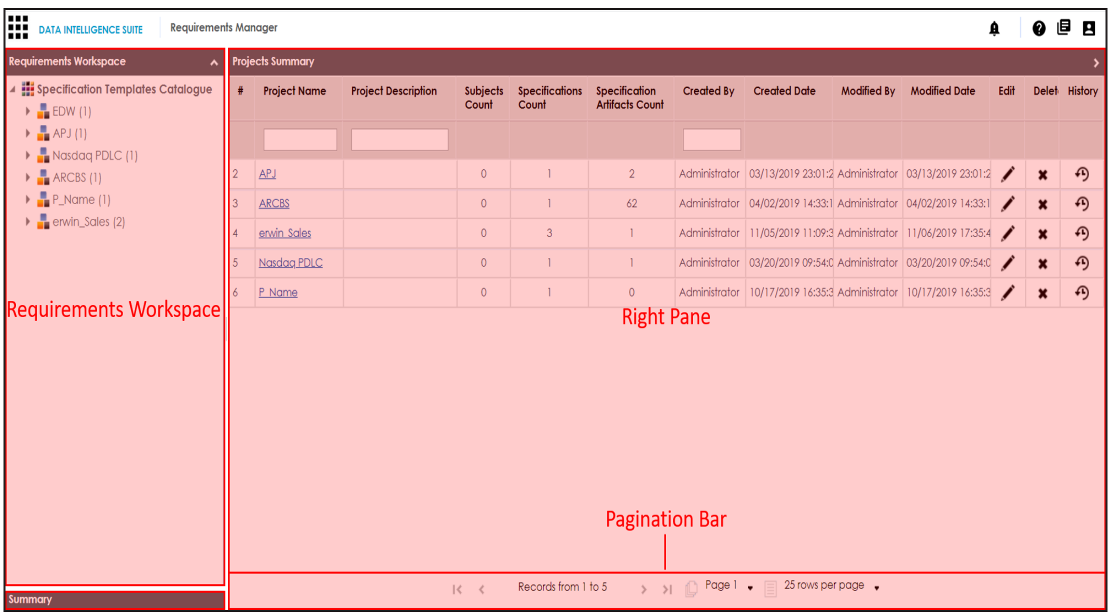
Managing Life Cycles

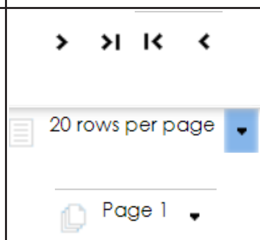
This section walks you through life cycle management in a data integration project. It involves requirements, release, and test management.

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

Using Requirements Manager

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



UI Section	Icon	Function
Requirements Workspace		Use this pane to browse through Projects and Specifications. It enables you to categorize and create specifications under projects.
Right Pane		Use this pane to view or work on the data based on your selection in the Requirements Workspace.
Pagination Bar		Use this bar to navigate through the data displayed on the Right Pane.
Summary		Use this pane to view summary of the projects. It displays the summary of the project selected in the Requirements Workspace.

Managing requirements involves the following:

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

Creating Templates

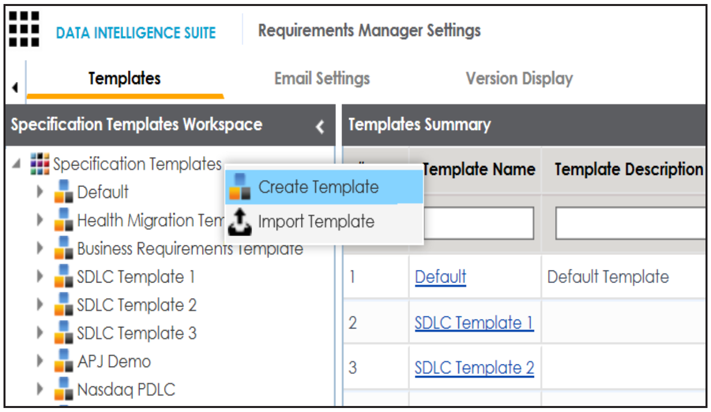
You can create your own customized templates and use these templates in creating specifications.

To create new templates, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Requirements Manager**.

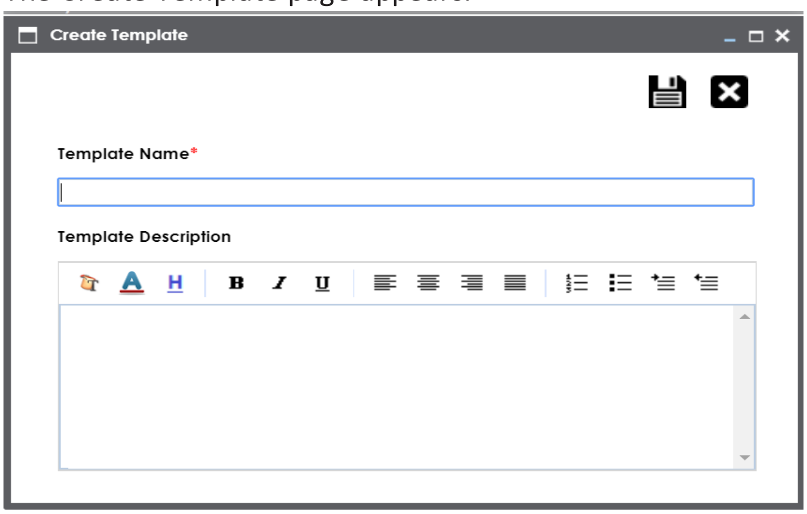
   The Requirements Manager Settings page appears. By default, the Templates tab opens.

2. Under the **Specification Templates Workspace** pane, right-click the **Specifications Templates** node.



3. Click **Create Template**.

   The Create Template page appears.



4. Enter **Template Name** and **Template Description**.

   For example:

- Template Name - Health Migration Template
- Template Description - This is a template to capture requirements of the migration project.

5. Click .

   The template is created and saved in the Specifications Templates tree.

After creating the template, you can add artifacts to the template.

Adding Artifacts to Templates

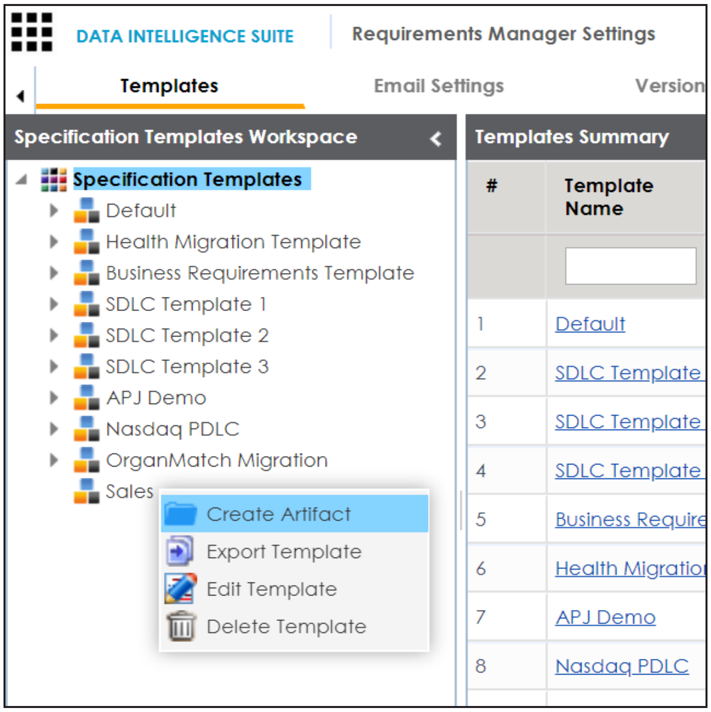
You can enrich a template by adding artifacts to the template.

Enriching templates involves:

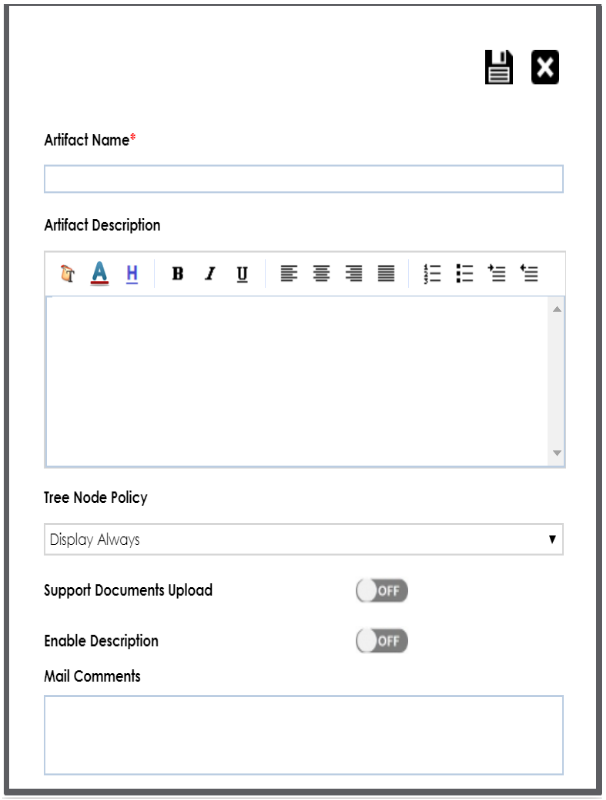
1. Adding multiple artifacts to templates
2. Adding multiple sub-artifacts to an artifact

To add artifacts to templates, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Requirements Manager**.
2. Under the **Specification Templates Workspace** pane, right-click the required template.



3. Click **Create Artifact**.



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
Artifact Name	Specifies the name of the artifact. For example, Enrollments.
Artifact Description	Specifies the description about the artifact. For example: The artifact can document all decisions for Person and Enrollment module.
Tree Node Policy	You can use this option to configure artifact visibility in an artifact tree in the Requirements Manager. Select an appropriate Tree Node Policy for the artifact: ▪ **Display Always** Displays the artifact in the artifact tree.

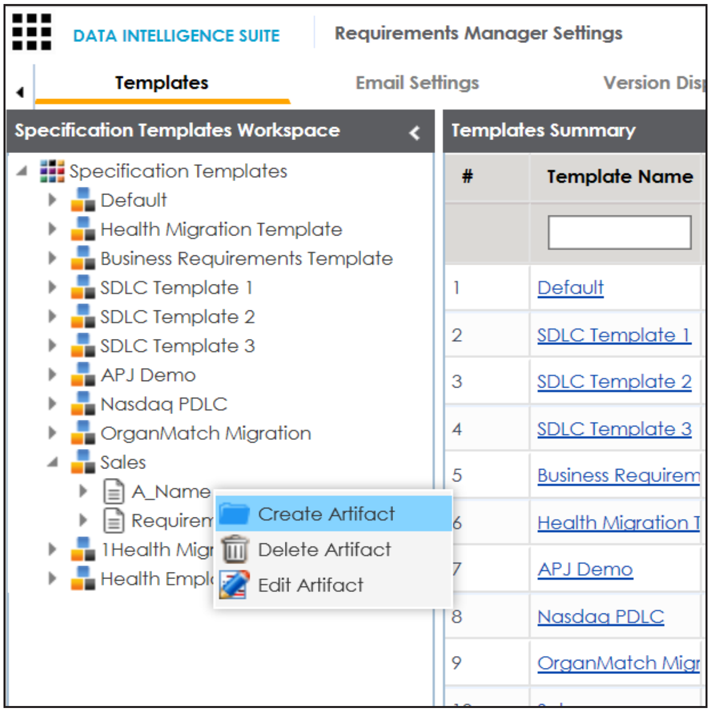
Field Name	Description
	▪ **Don't display for single child** Does not display the artifact in the artifact tree. ▪ **Display on multiple child nodes** Displays artifacts when it has more than one child artifacts.
Support Documents Upload	Specifies whether documents can be uploaded for the child artifacts. Switch **Support Documents Upload** to **ON** to enable uploading of documents for the child artifacts.
Enable Description	Specifies whether description can be entered for the child artifacts. Switch **Enable Description** to **ON** to enable entry of description for the child artifacts.
Mail Comments	Specifies the mail comments which are sent to the project users. For example: This artifact is a part of Health Migration Template. Use this field if the template is being used in any project for creating a specification.

5. Click .

   The artifact is created and added to the template.

To add sub-artifacts to artifacts, follow these steps:

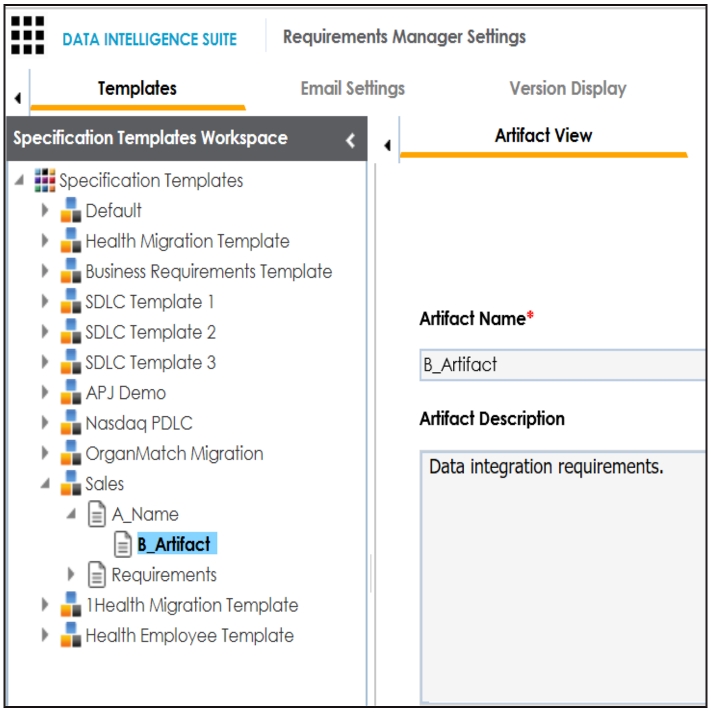
1. Right-click the required artifact and click **Create Artifact**.



The Create Artifact page appears.

2. Enter the required fields and click .

The sub-artifact is created and is added to the sub-artifact tree.



Once you have created a template and added artifacts to it, you can now create your own custom forms for the artifacts.

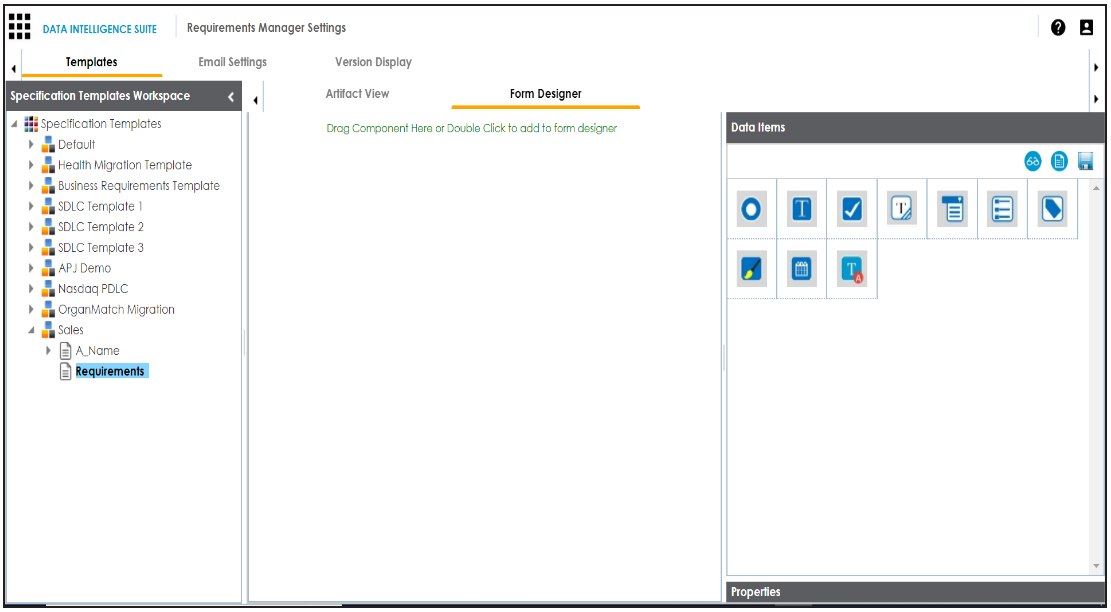
Designing Forms

You can design a custom form for an artifact. The custom form will be available in all the child artifacts of the artifact.

To design your own custom forms, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Requirements Manager**.
2. Under the **Specification Templates Workspace** pane, click the required artifact.

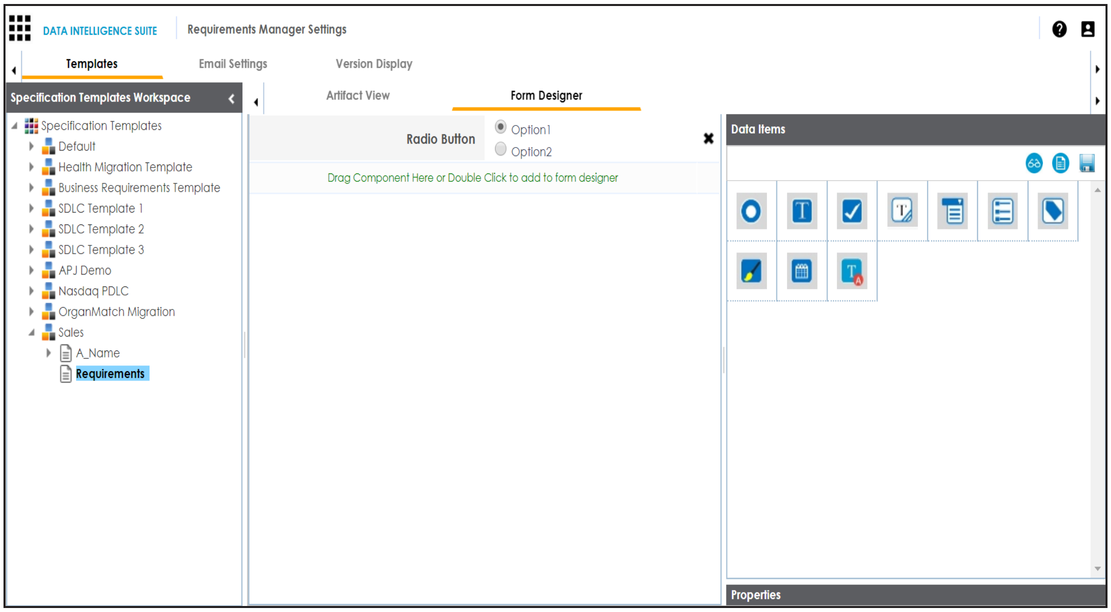
3. Click the **Form Designer** tab.



The Form Designer tab contains the following sections

- **Data Items**: This pane displays the available UI elements.
- **Properties**: This pane displays the properties of the selected UI element in the form designing space.

4. Double-click or drag and drop the required UI elements from the Data Item pane to the form designing space.
5. Select UI elements, one at a time, and configure their properties in the Properties pane.



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

Refer to the following table for property descriptions:

Property	Description
Name	Specifies the name of the form field. For example, combobox260. You can change it as per your requirements.
Label	Specifies the information of this field. For example, Status.
Type	Specifies the type of form field. For example, Combo Box. Double-click the corresponding value cell to select an option.
Visible	Specifies whether the field is visible in the form. Select the **Visible** check box to make the field visible in the form.
Enabled	Specifies whether the field is enabled in the form. Select the **Enabled** check box to make the field enabled in the form.
Mandatory	Specifies whether the field is mandatory in the form.

Property	Description
	Select the **Mandatory** check box to make the field mandatory in the form.
Control Width	Specifies the width of the control option. For example, 95%. Double-click the corresponding value cell to change it.
Label Style	Specifies the label text style of the field. Click ... to select a text style.
Control Style	Specifies the text style. Click ... to select a text style.
Default Value	Specifies the default value of the field. For example, draft. Double-click the corresponding value cell to change it.
List	Specifies the list of values applicable for this field. For example: ▪ Draft ▪ Ready for review ▪ Approved Click ... to more control option and define values.

6. Use to control:

   Form Label Width

   It enables you to modify width of the label in % specific to window.

   Form Control Width

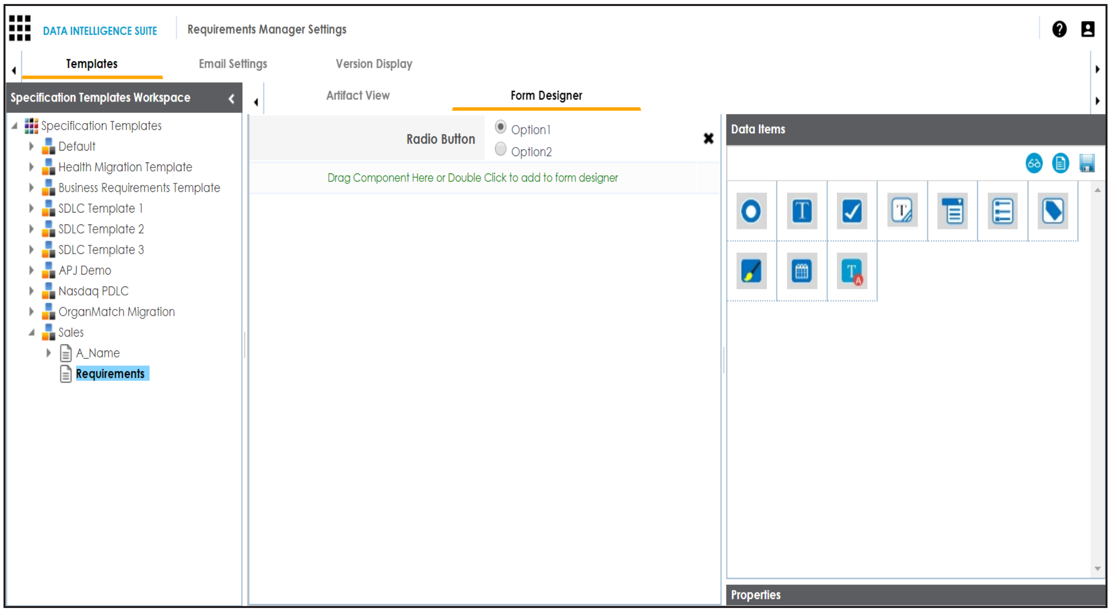
   It enables you to modify width of the control option in % specific to window.

7. Click to preview.
8. Click .

The Master Template Option is saved.

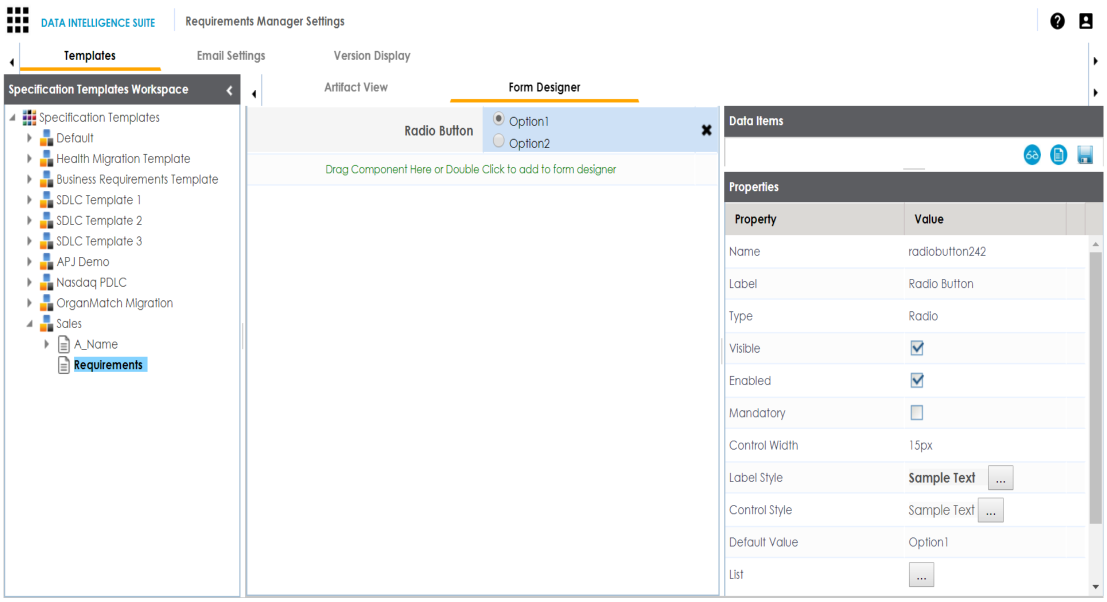
Take an example of radio button:

1. Double-click or drag and drop the Radio Button icon from Data Items to the space provided to design the form.



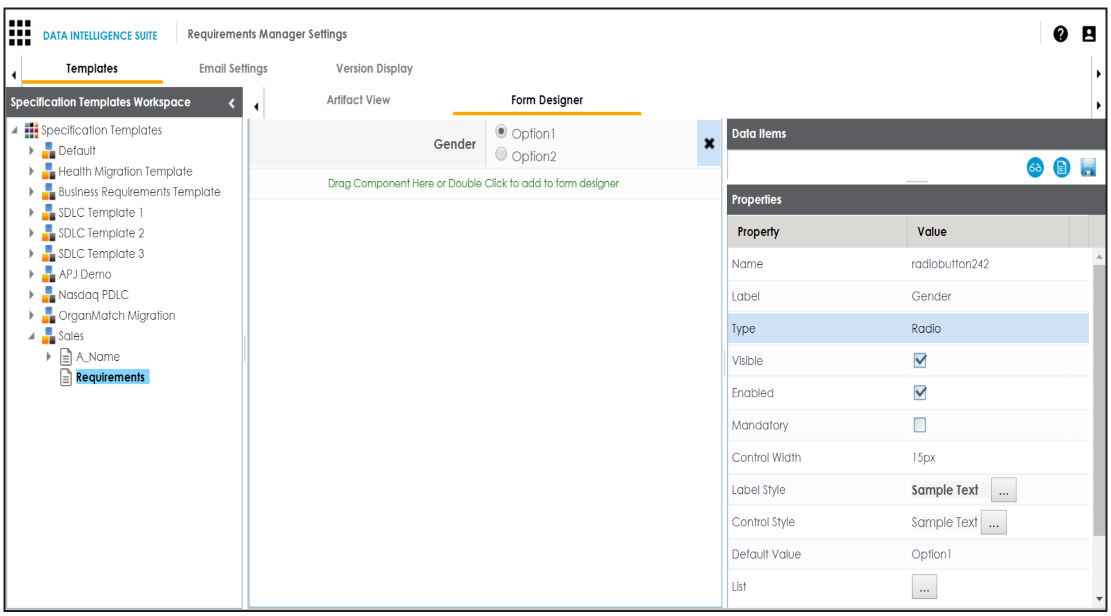
2. Click the cell containing Option 1.

   You can view the properties of the data item.

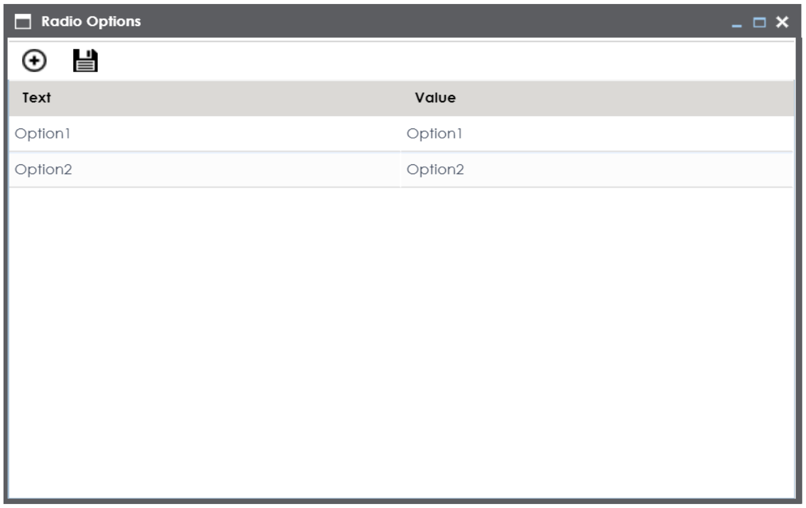


3. Double-click the **Value** cell corresponding to **Label** and edit it to change the Label.

   For example, we changed it to Gender and the form appears as shown below.

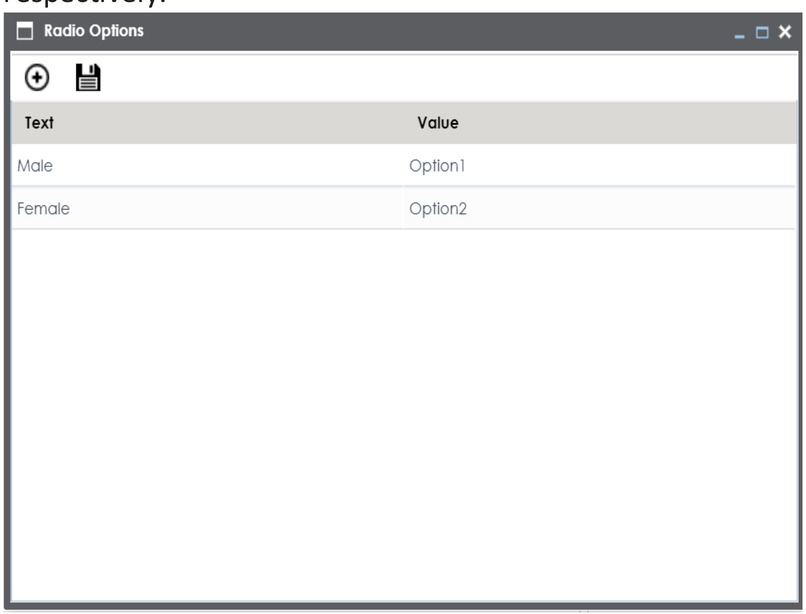


4. Click ... against the **List** to edit radio options.



5. Double-click **Option 1** and edit it. Similarly, to edit Option 2 text in the form double-click **Option 2**.

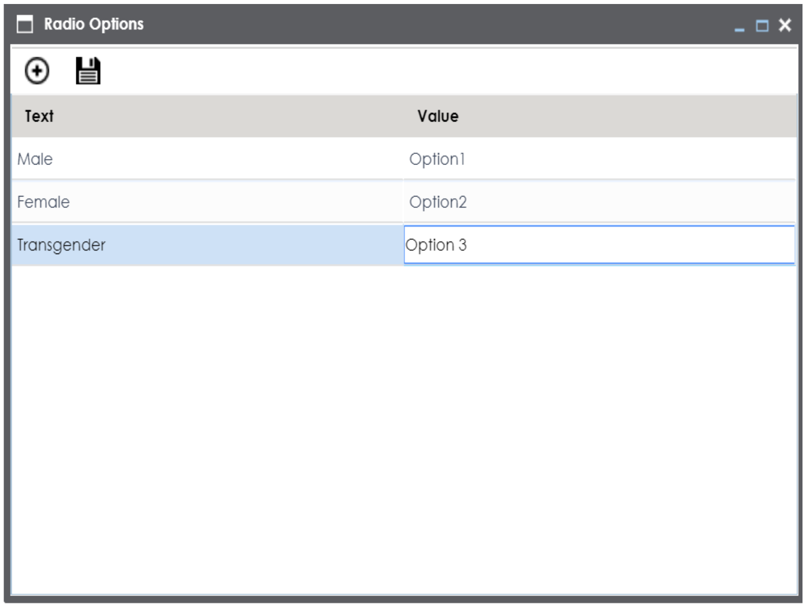
   We edited Option 1 text and Option 2 text and entered Male, and Female respectively.



6. Click ⊕ to add more options.

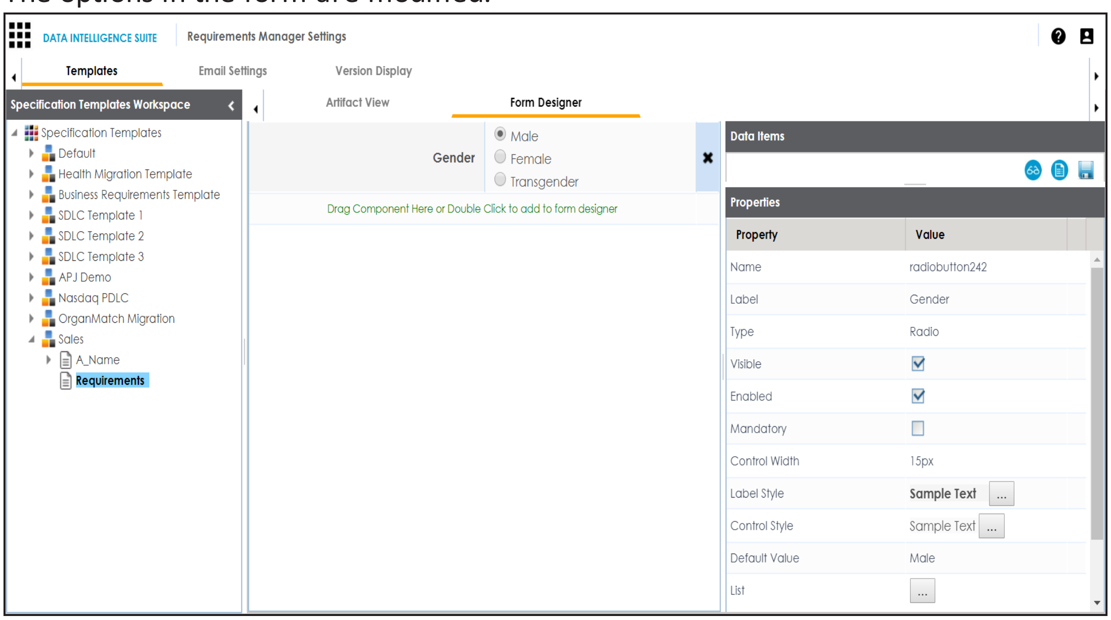
One row is added.

7. Double-click the cells to enter the option.



8. Click .

The options in the form are modified.



9. Click .

   The Master Template Option is saved.

10. Click to preview.

    The Preview Window appears.

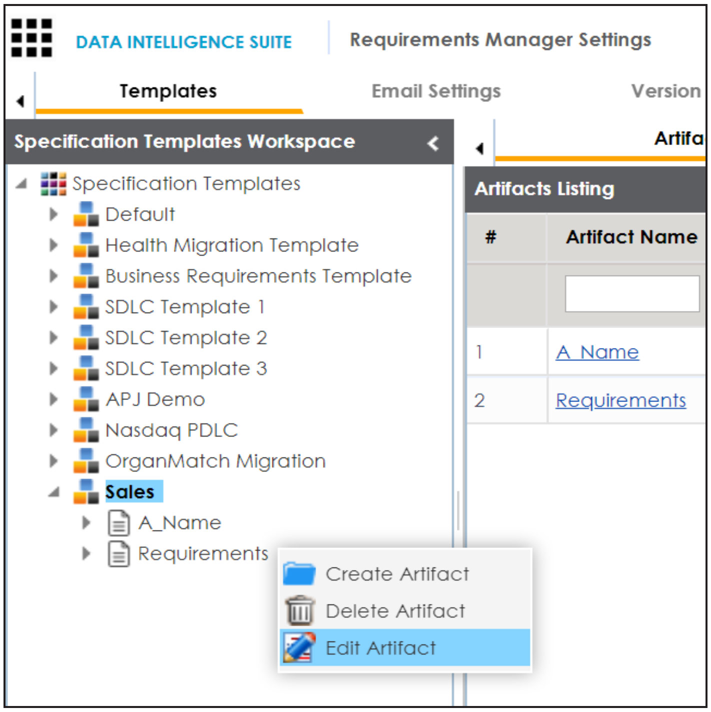
Managing Artifacts

Managing artifacts involves:

- Editing artifacts
- Deleting artifacts

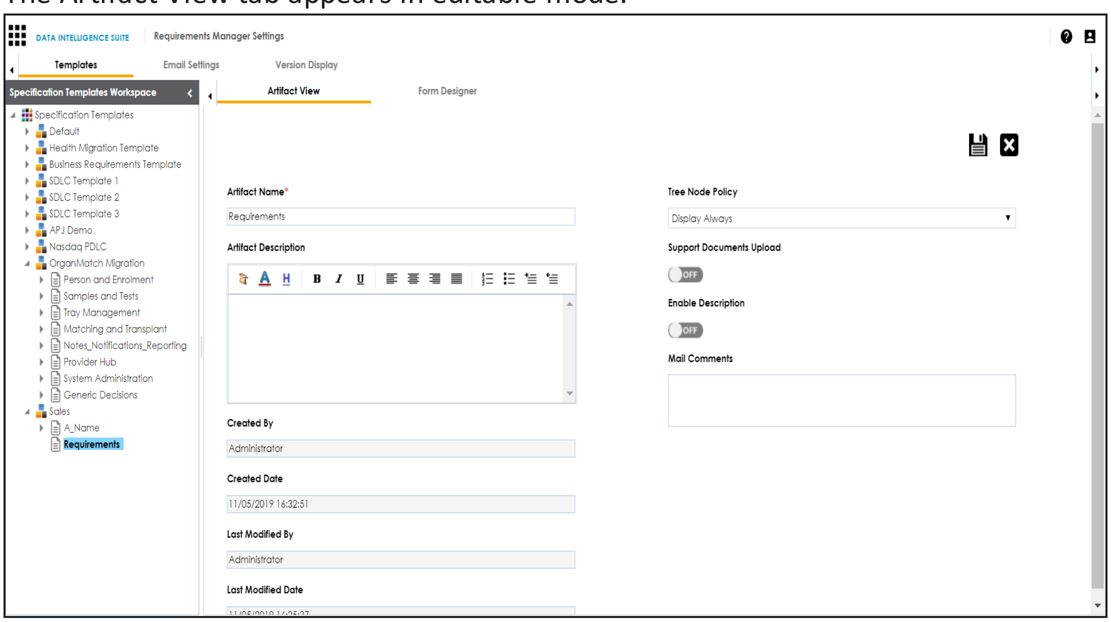
To edit artifacts, follow these steps:

1. Go to **Application Menu** > **Miscellaneous** > **Settings** > **Requirements Manager** > **Templates**.
2. Under the **Specification Templates Workspace** pane, right-click the required artifact.



3. Click **Edit Artifact**.

   The Artifact View tab appears in editable mode.



4. Edit the fields on the Artifact View tab.

5. Click .

   The fields are updated.

To delete artifacts, follow these steps:

1. Under the **Specification Templates Workspace** pane, right-click the required artifact.
2. Click **Delete**.

   A warning message appears.

3. Click **Yes** to delete the artifact.

   Note: Deleting an artifact removes all the associated artifacts and specification artifacts.

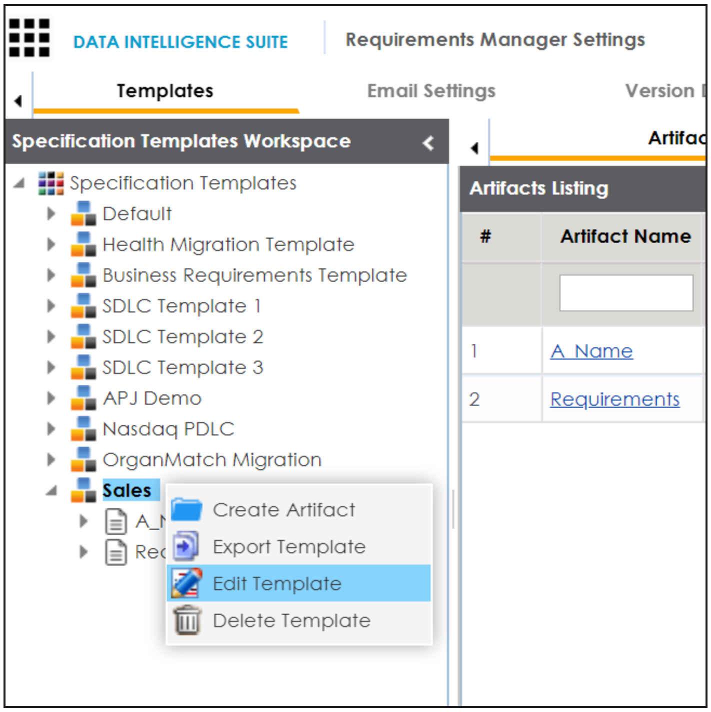
Managing Templates

Managing templates involves:

- Exporting templates
- Editing templates
- Deleting templates

To manage templates, follow these steps:

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



2. Use the following options:

Export Template

Use this option to export the template in .xml format.

Edit Template

Use this option to edit the template. You can update template name and its description.

Delete Template

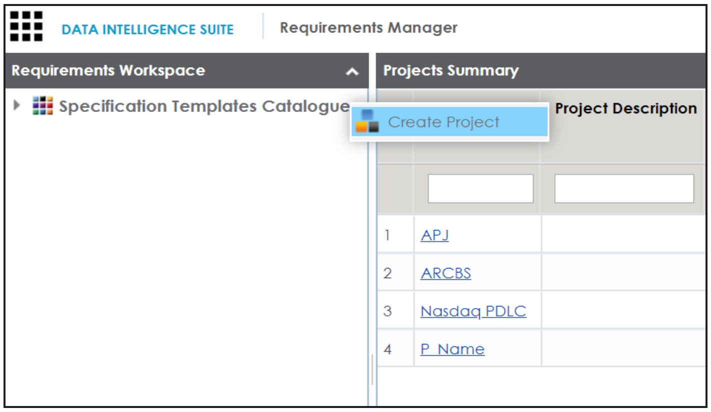
Use this option to delete the template.

Creating Projects

Projects are the highest node in the Requirements Manager and contain specifications. You can create multiple projects and create subjects under a project to provide one more level of categorization to specifications.

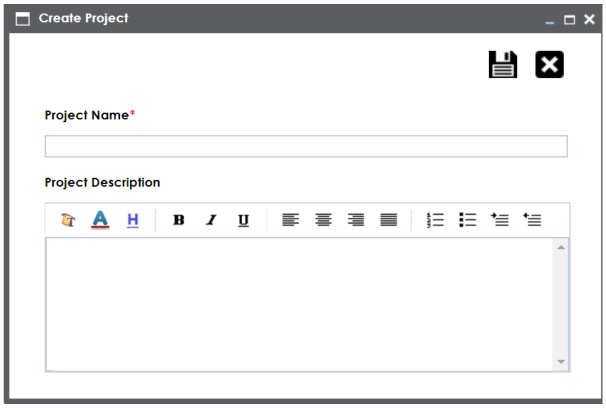
To create projects, follow these steps:

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



3. Click **Create Project**.

The Create Project page appears.



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

For example:

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

5. Click .

The project is created and saved in the Specification Templates Catalogue tree.

Note: You can also create subjects under the project. Subjects can also contain multiple specifications.

Once a project is created you can:

- Assign users to the project
- Add specifications to the project

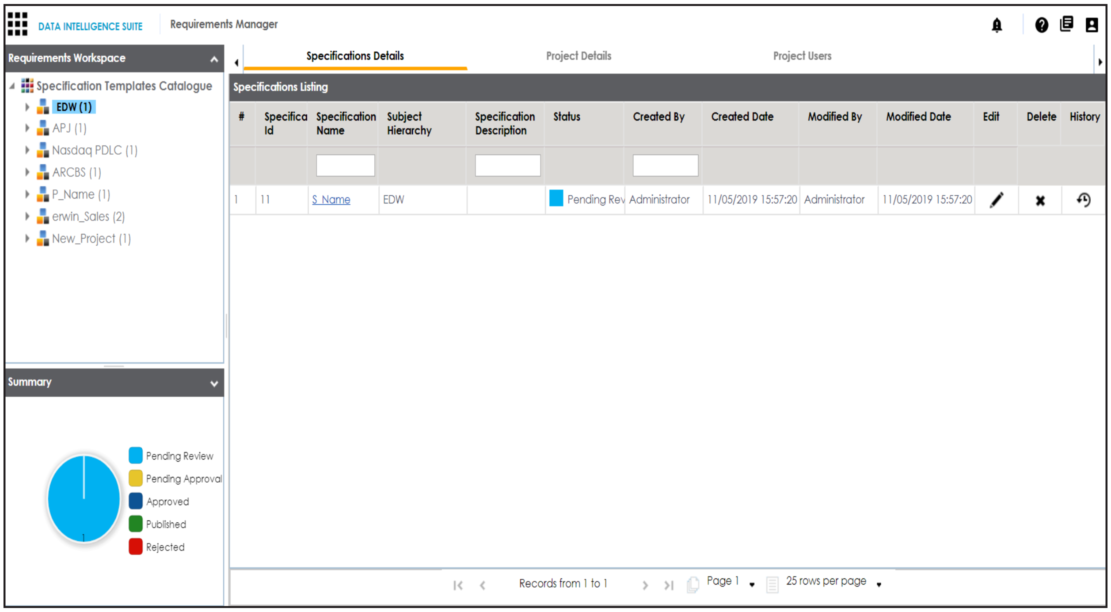
Assigning Users to Projects

You can assign or unassign users to projects in the Requirements Manager. The assigned users have write access to all the subjects and specifications under the project.

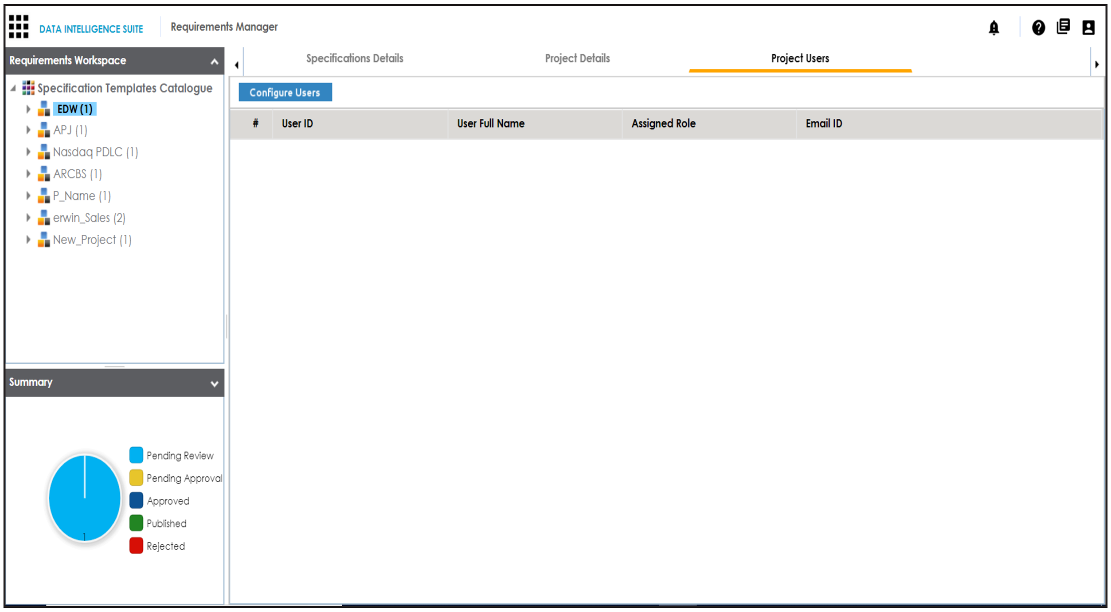
To assign or unassign users to projects, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Requirements Manager**.
2. Under the **Requirements Workspace** pane, click the desired project node.

   The following page appears.

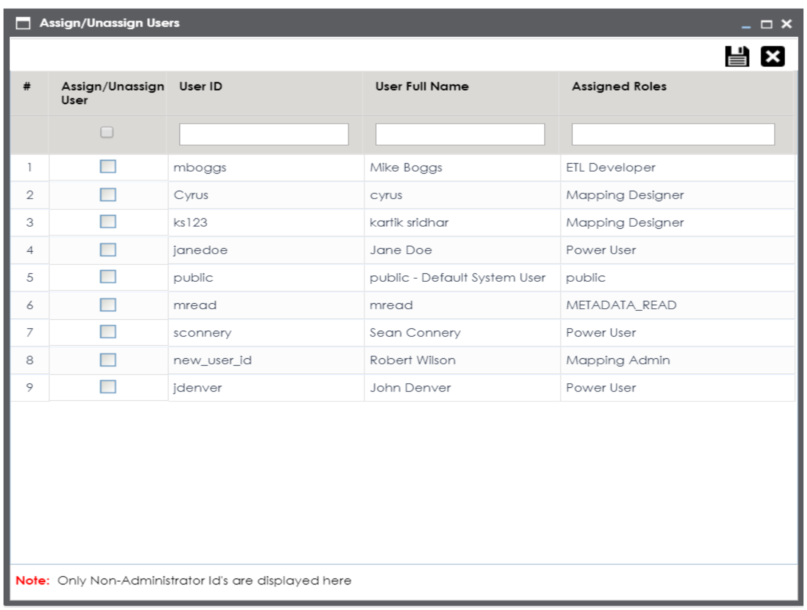


3. Click **Project Users**.



4. To assign or unassign users, click **Configure Users**.

   The Assign/Unassign Users page appears.



5. Select the corresponding check box to assign a user to the project.

   Note: You can assign multiple users to a project.

6. Click .

   The project is assigned to the selected users.

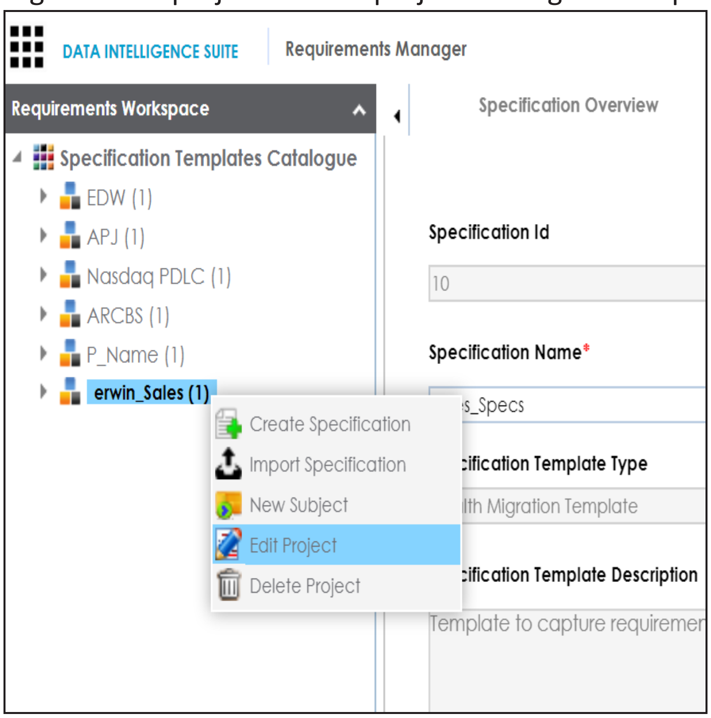
Managing Projects

Managing projects involves:

- Creating subjects
- Editing projects
- Deleting projects

To manage projects, 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. A subject provides one more level of categorization to the specifications. You can add multiple specifications to a subject in the same manner as specifications are added to a project.

Edit Project

Use this option to update project name and its description.

Delete Project

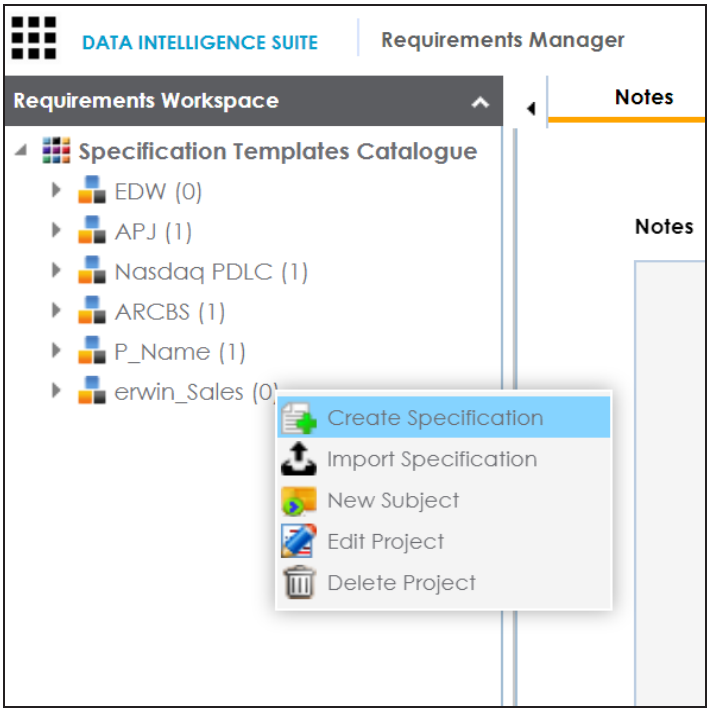
Use this option to delete the project.

Creating Specifications

You can create multiple specifications under a project. A specification uses a template and it is used to document the requirements.

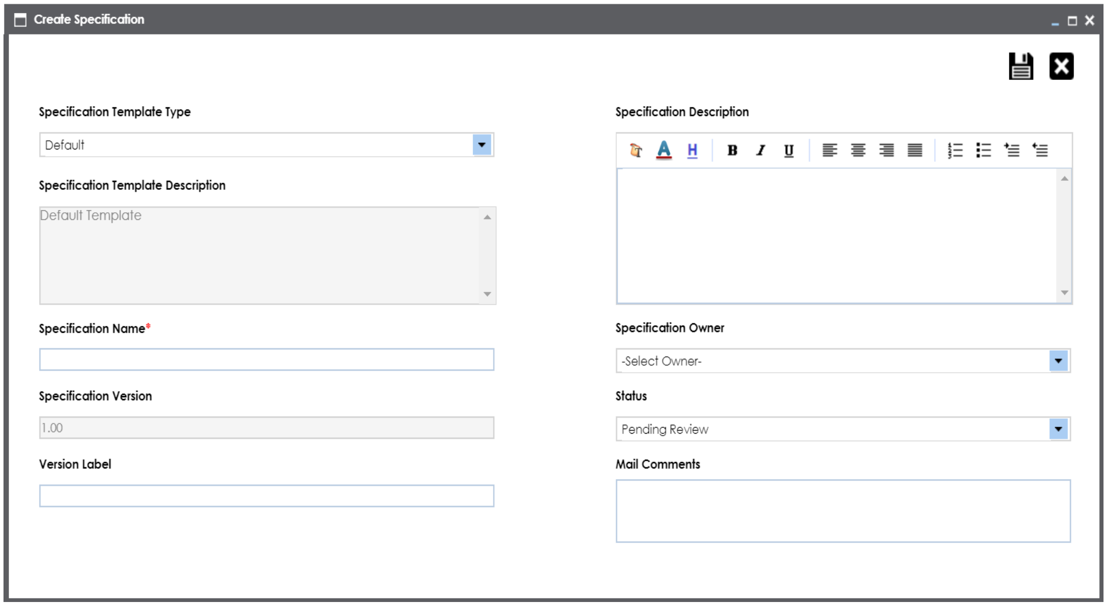
To create new specifications, follow these steps:

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



3. Click **Create Specifications**.

The Create Specification page appears.



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

Field Name	Description
Specification Template Type	Specifies the template of the specification. For example, Health Migration Template. You can create templates and add artifacts to templates in the Requirements Manager Settings.
Specification Template Description	Specifies the description about the specification template. 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. The specification version is autopopulated. For more information on configuring version display of specifications, refer to the Configuring Version Display topic.

Field Name	Description
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 topic.
Specification Description	Specifies the description about 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 the mail comments, which are sent to the 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 stored in the Specifications tree.

   A tree of artifacts appear under the specification node. These are the artifacts which were added to the selected template.

Once a specification is added to the project, you can:

- Add supporting documents to the specification
- Collaborate with other users
- Create child artifacts
- Document requirements

Uploading Supporting Documents

You can upload supporting documents for a specification and enter a description about the document.

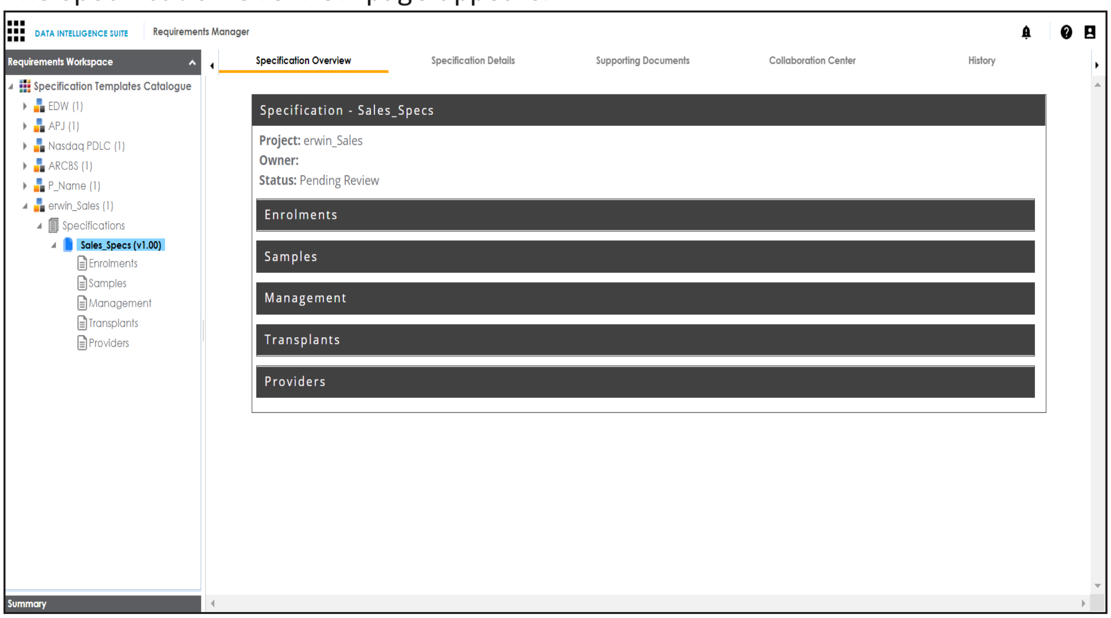
You can also specify:

- Document name
- Document owner
- Document link
- Document status

To upload supporting documents to specifications, follow these steps:

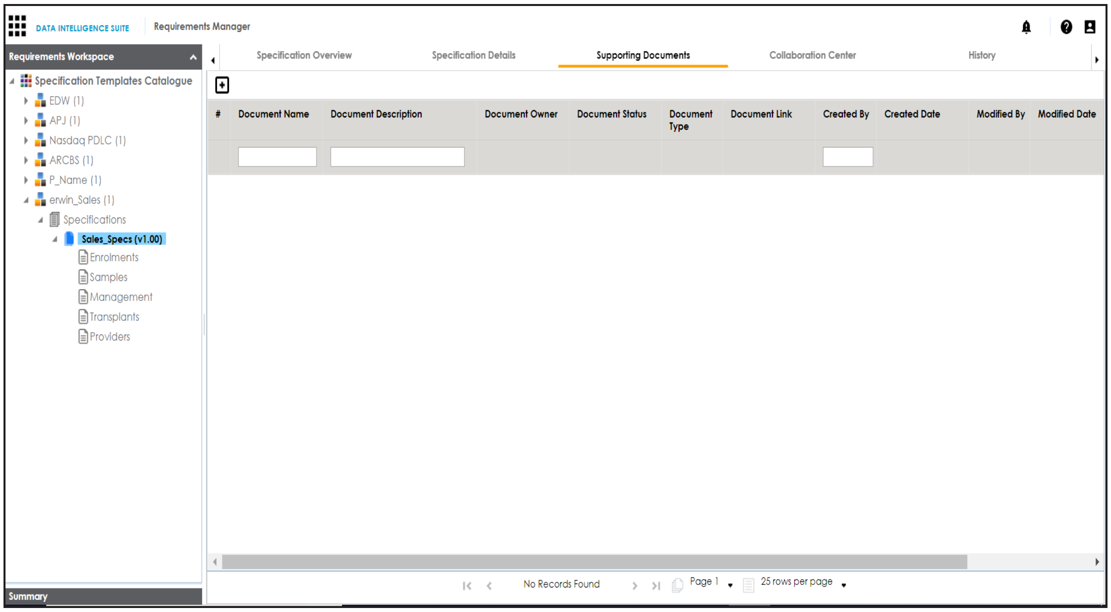
1. Go to **Application Menu** > **Data Catalog** > **Requirements Manager**.
2. Under the **Requirements Workspace** pane, click the required specification.

   The Specification Overview page appears.

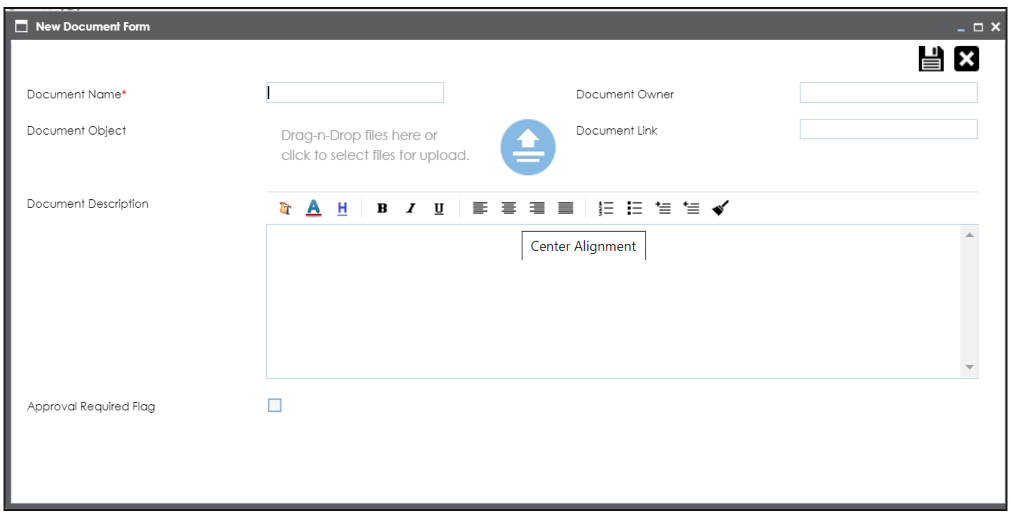


3. Click the **Supporting Documents** tab.

   The following page appears.



4. Click .



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
Document Name	Specifies the name of the physical document being attached to the specification.

Field Name	Description
	For example, Functional Requirements.
Document Object	Drag and drop document files or use to select and upload document files.
Document Owner	Specifies the document owner's name.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Description	Specifies the description of the document. For example: The document contains a detailed record of the functional requirements of the data integration project.
Approval Required Flag	Specifies whether the document requires approval. Select the **Approval Required Flag** check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

6. Click .

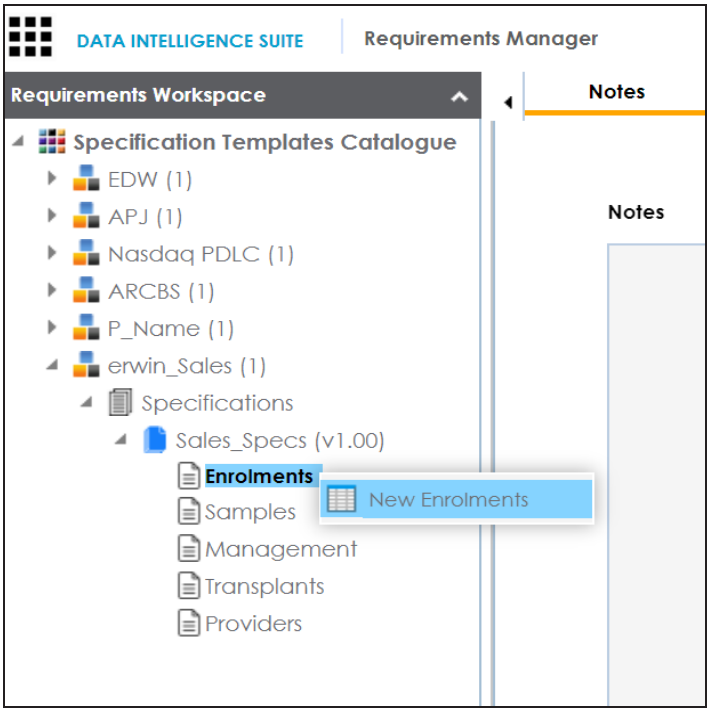
   The document is saved under the Supporting Documents tab.

Creating Child Artifacts

You can create multiple child artifacts of an artifact and enrich the artifact.

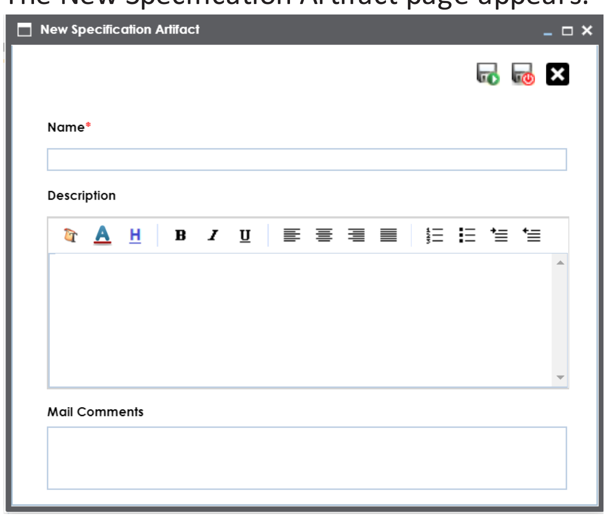
To create child artifacts, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Requirements Manager**.
2. Under the **Requirements Workspace** pane, right-click the required artifact.



3. Click New <Artifact_Name>.

   The New Specification Artifact page appears.

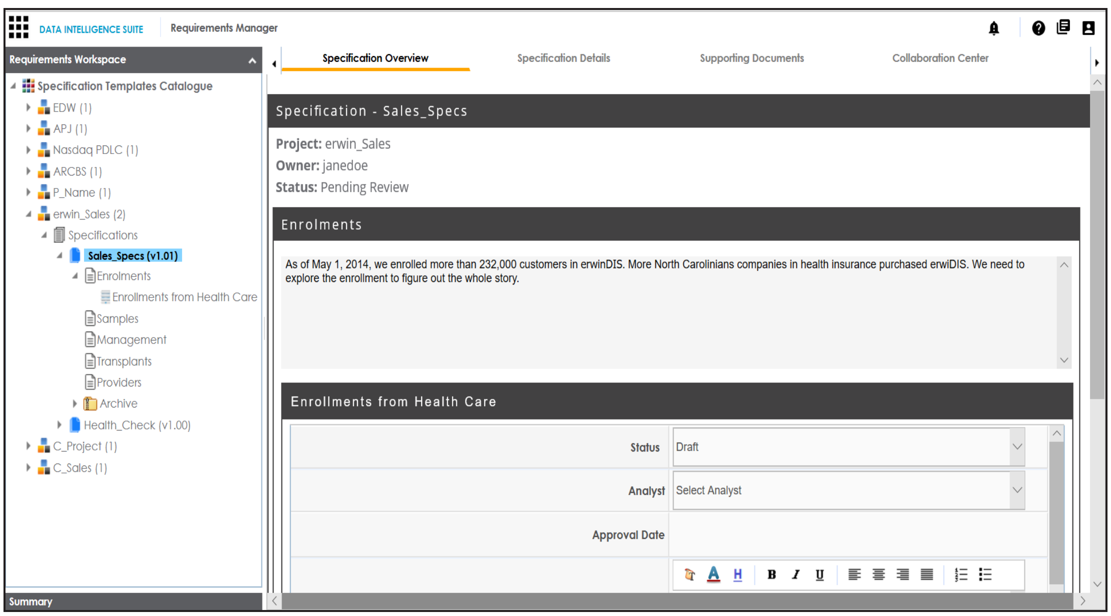


4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Name	Specifies the name of the child artifact. For example, Enrollments from Healthcare.
Description	Specifies the description about 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 which 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.

5. Click .

   A child artifact is created and saved under the child-artifact tree. You can see the child artifact under the Specification Overview tab.



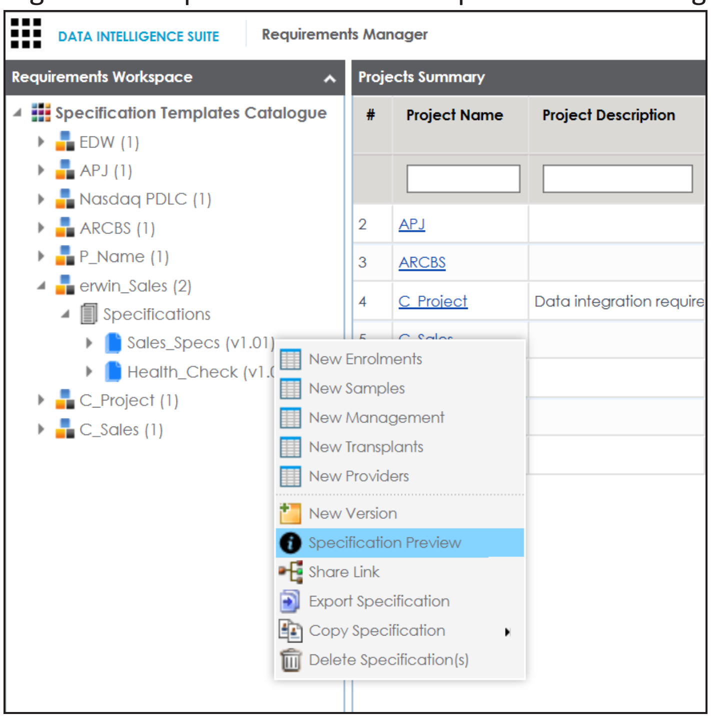
Managing Specifications

Managing specifications involves:

- Previewing specifications
- Sharing Link of Specifications
- Copying Specifications
- Editing Specifications
- Deleting Specifications

To manage specifications, follow these steps:

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



2. Use the following options:

Specification Preview

Use this option to preview the specification.

Share Link

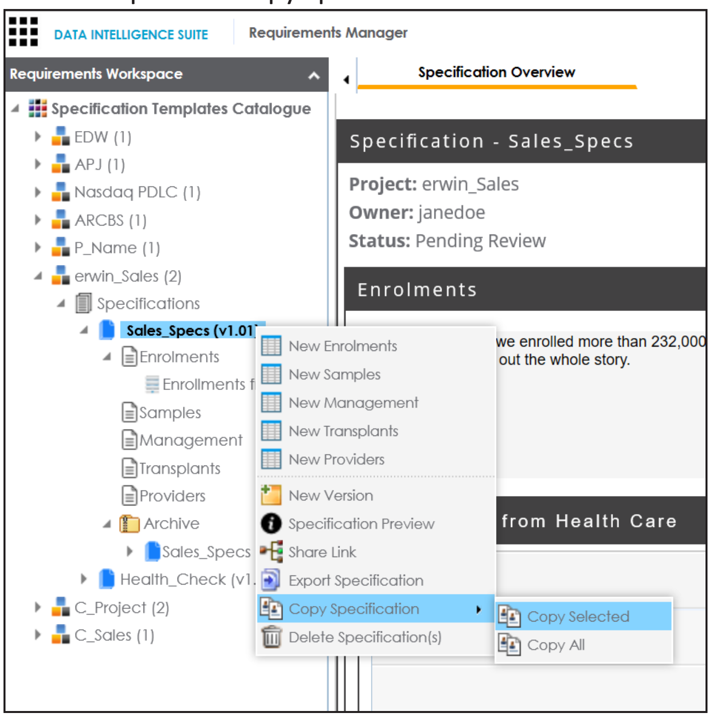
Use this option to obtain URL of the specification. You can copy the URL or send the URL through an email using MS Outlook.

Export Specification

Use this option to download the specification in .xml format.

Copy Specification

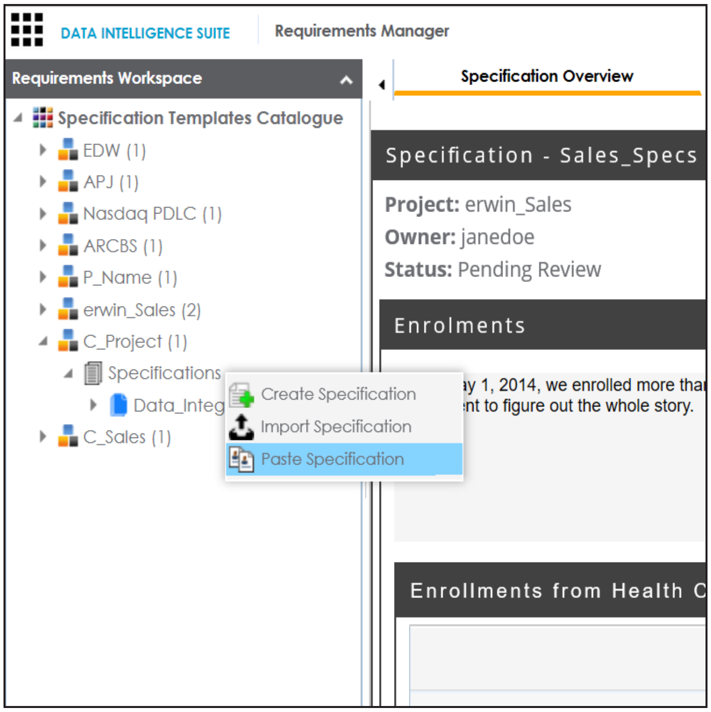
Use this option to copy specifications.



Copy Selected: To copy specifications, select the specification, right-click the specification and click **Copy Selected**.

Copy All: This option enables you to copy the archived specifications too.

After copying specification you can paste the specifications in a project.



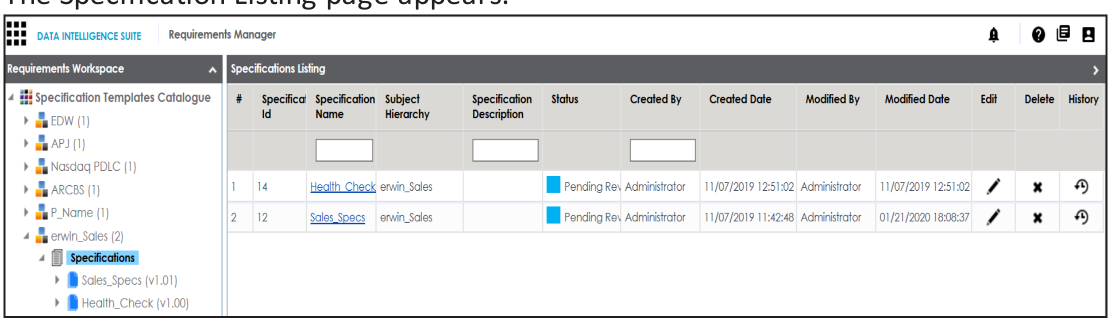
Delete Specification

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

To edit specifications, follow these steps:

1. Click the **Specifications** node.

   The Specification Listing page appears.



2. Click .

   The Specification Details page appears in editable mode.

3. Update the fields and click .

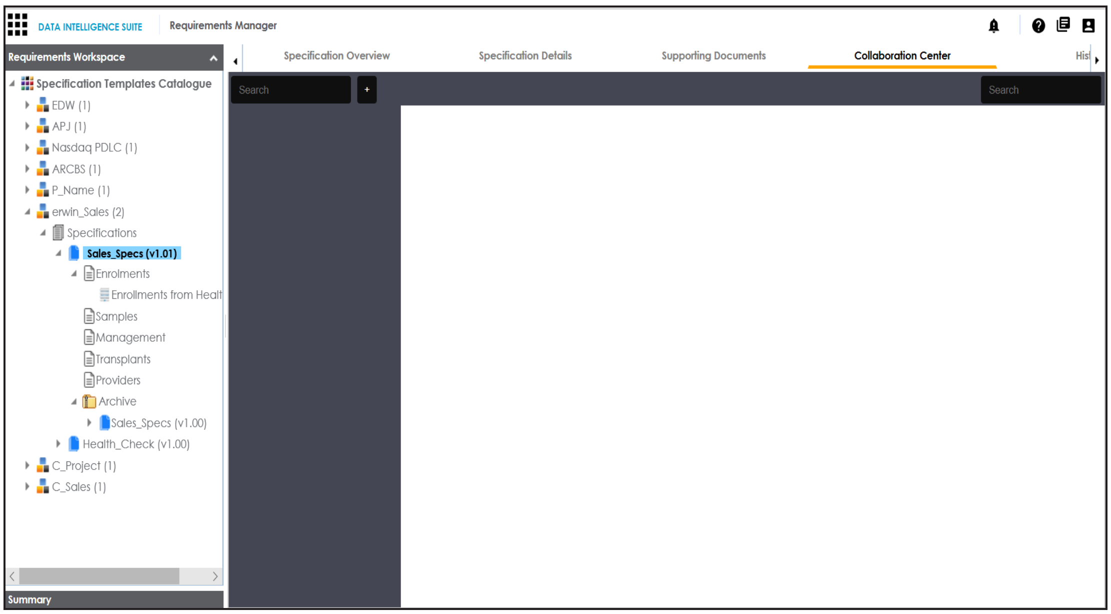
   The specification is updated.

Collaborating with Users

You can collaborate with other users on a specification. You need to create a topic under the Collaboration Center and assign users to the topic. The assigned users can chat with each other and discuss the topic.

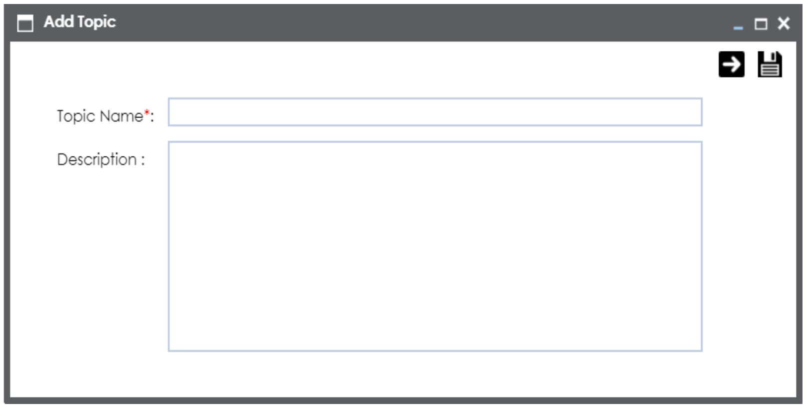
To collaborate with other users, follow these steps:

1. Click the desired specification and click the **Collaboration Center** tab.



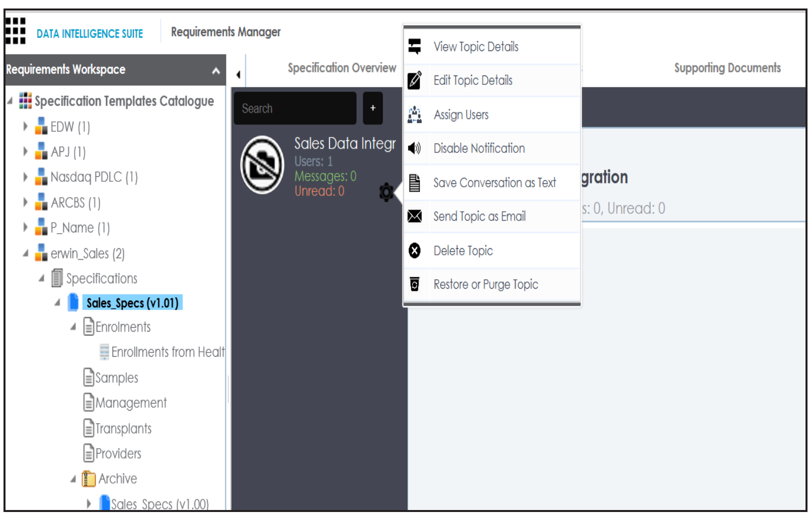
2. Click to add a topic.

   The Add Topic page appears.



3. Enter Topic Name and Description.
4. Click .

   The new topic is created and saved under the Collaboration Center tab.
5. Click .



6. Use the following options:

   View Topic Details

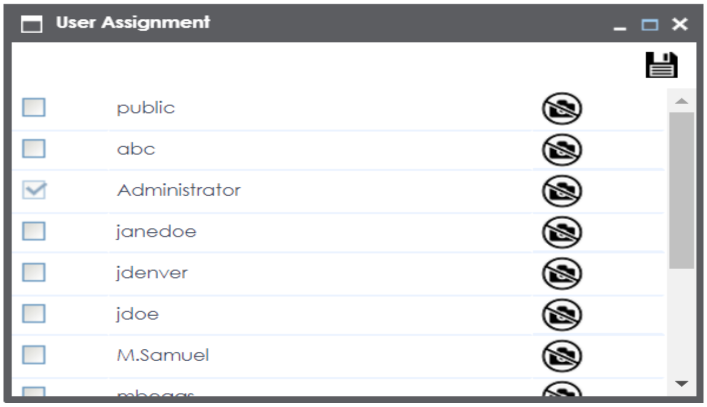
   Use this option to view the topic details.

   Edit Topic Details

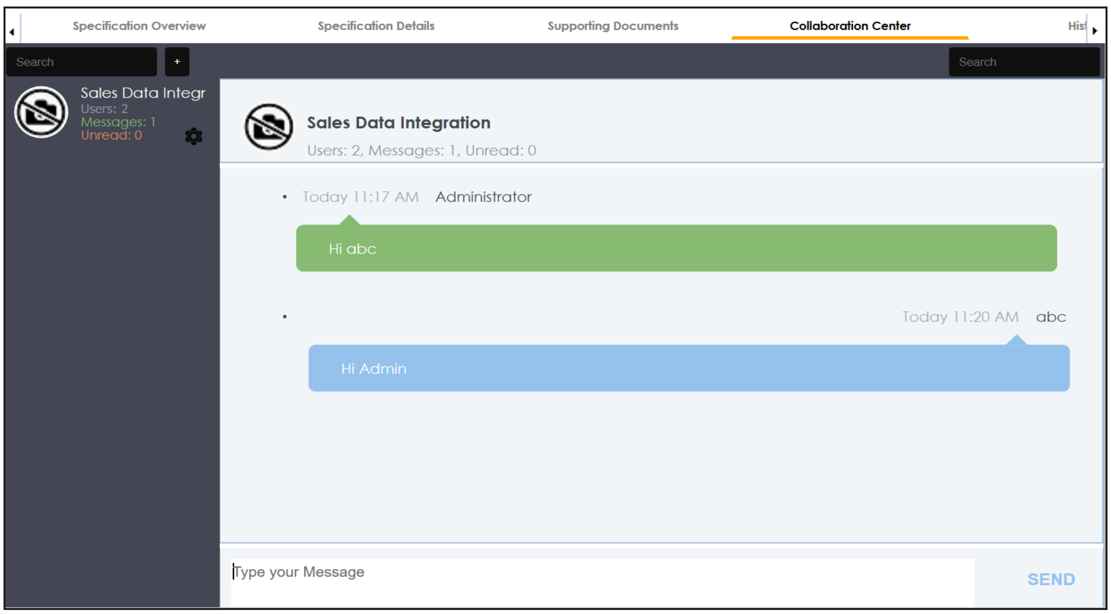
   Use this option to edit the topic details.

Assign Users

Use this option to assign users to the topic.



Select check boxes to assign users to the topic and then click . The assigned users can chat and collaborate with each other.



Save Conversation as Text

Use this option to download the conversation in a .txt file.

Send Topic as Email

Use this option to send topic as an email to the assigned users.

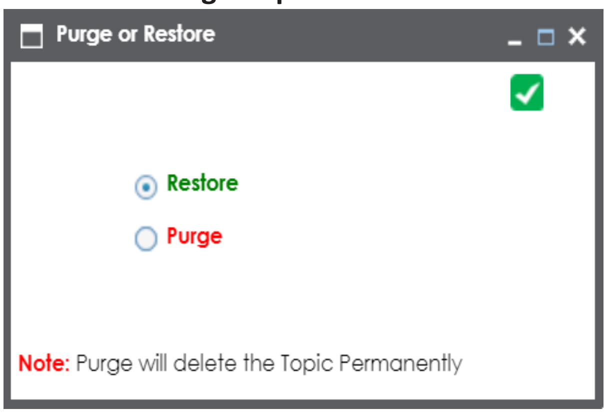
Delete Topic

Use this option to delete the topic. The topic is deleted for all the assigned users.

Note: Any assigned user can delete the topic.

Restore or Purge Topic

The deleted topic can be restored or deleted permanently (Purge). Click **Restore or Purge Topic**.



To restore the topic, select the **Restore** radio button and click .

To delete the topic permanently, select the **Purge** radio button and click .

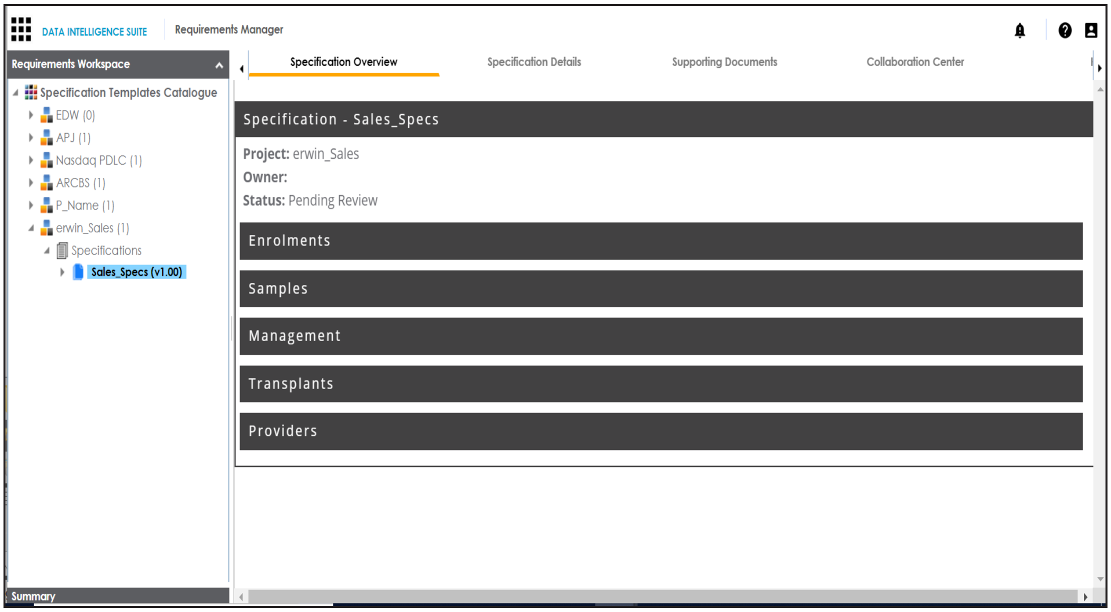
Documenting Requirements

You can document your requirements in the specifications.

To document specifications, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Requirements Manager**.
2. Under the **Requirements Workspace** pane, expand the desired project.
3. Click the desired specification.

   The Specification Overview page appears. It displays the template, and the artifacts.



4. Hover over an artifact bar and use the following options:

Expand or Collapse (or)

Use this option to expand or collapse the artifact.

Edit ()

To enter content in the artifact, click .

Add Specification Artifact ()

Use this option to add child artifacts.

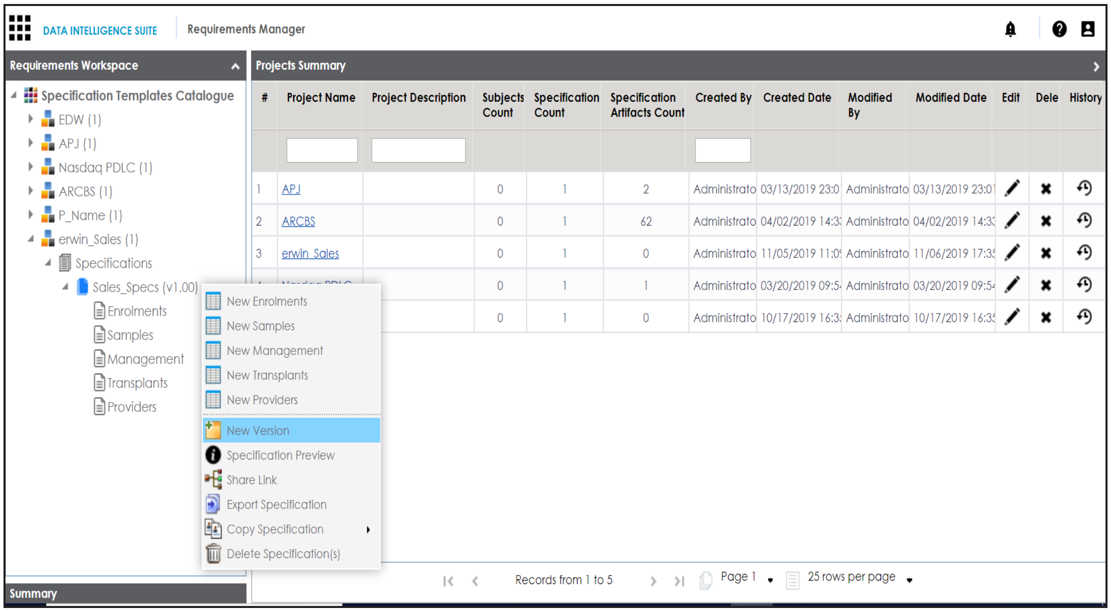
Note: Child artifacts will contain the custom form added to the artifact.

Creating Versions of the Specifications

You can create versions of a specification and keep a legacy of old specifications. You can also compare any two versions of the specifications for the changes.

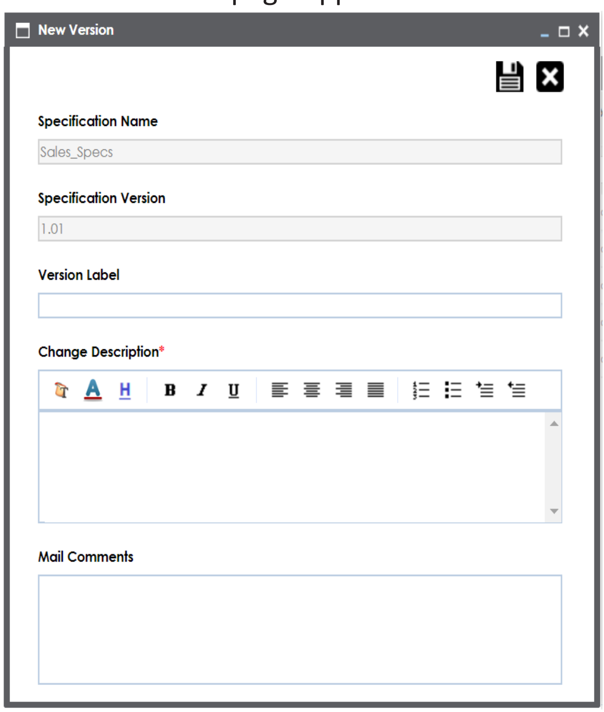
To create new versions of the specifications, follow these steps:

1. Right-click the required specification.



2. Click **New Version**

   The New Version page appears.



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

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

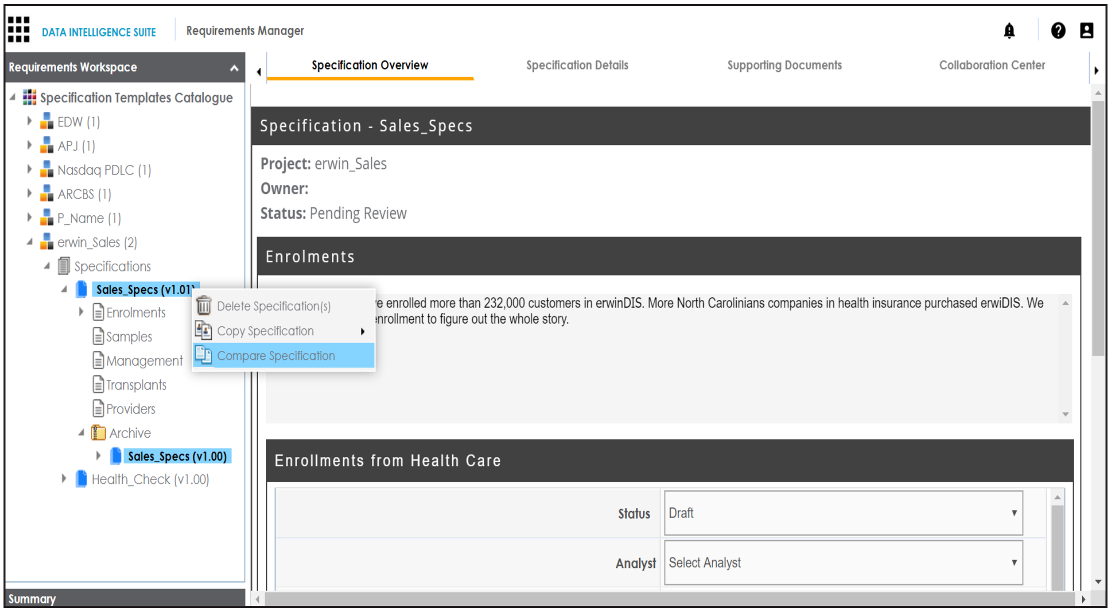
4. Click .

   A new version of the specification is created and stored in the Specifications tree.

   The older version is archived and cannot be edited.

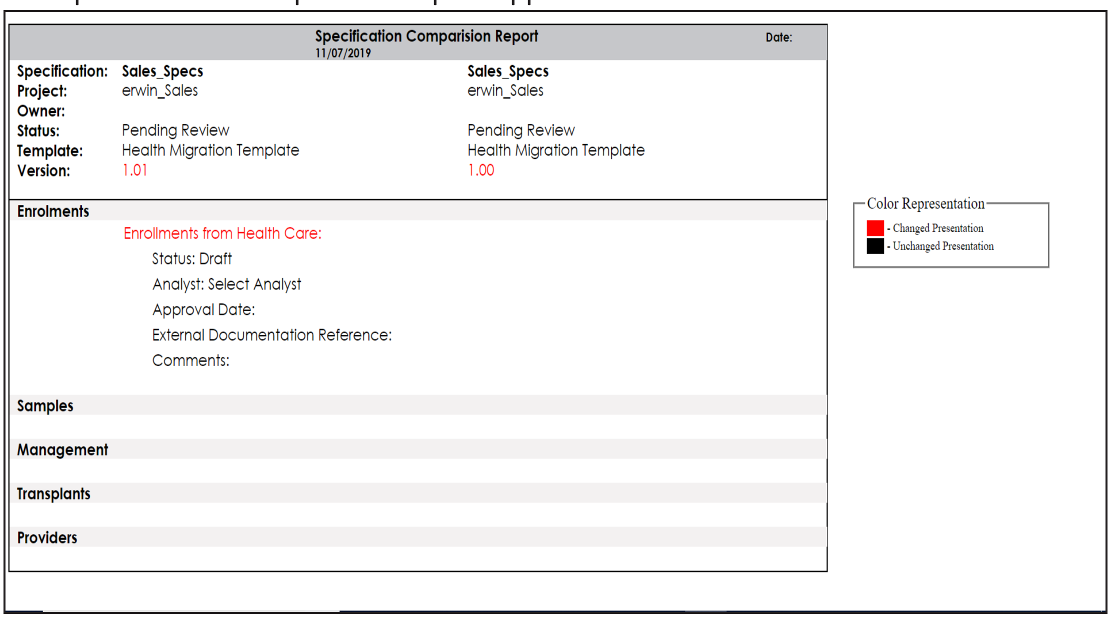
To compare the two versions of a specification, follow these steps:

1. Use CTRL key to select the two versions.
2. Right-click the selection.



3. Click **Compare Specification**.

The Specification Comparison Report appears.

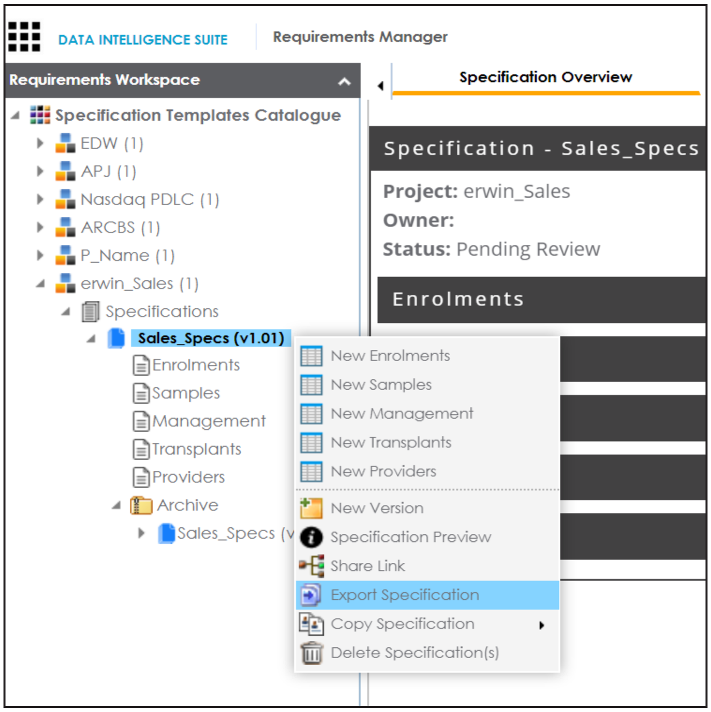


Exporting and Importing Specifications

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

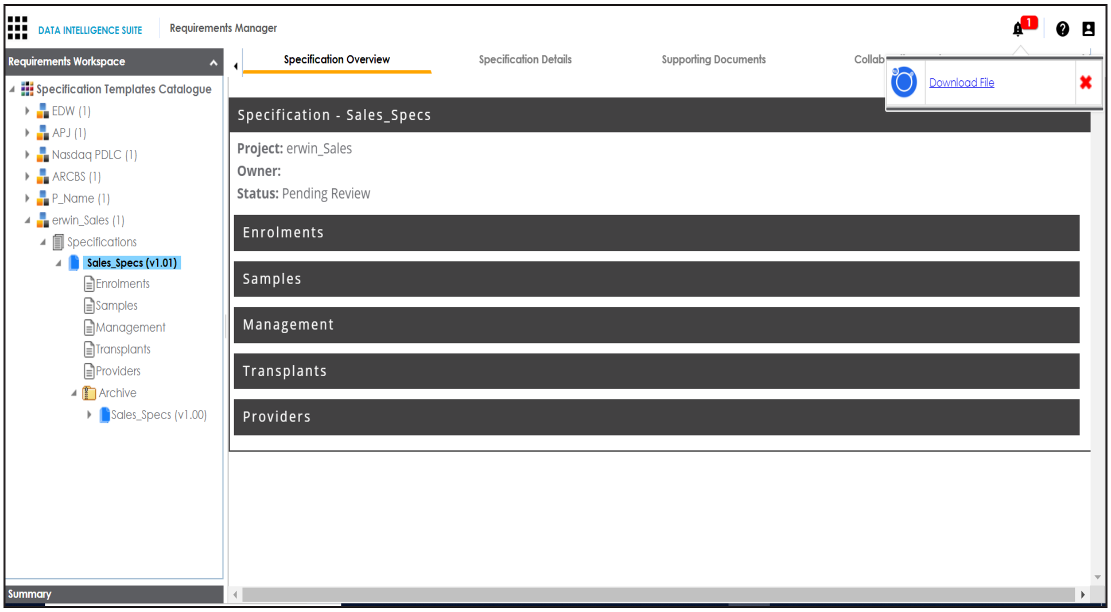
To export specifications, follow these steps:

1. Right-click the desired specification.



2. Click **Export Specification**.

   The Download File hyperlink appears.



3. Click **Download File**.

   The specification is downloaded in .xml format.

You can create a specification by importing the exported specification.

To import the specification, follow these steps:

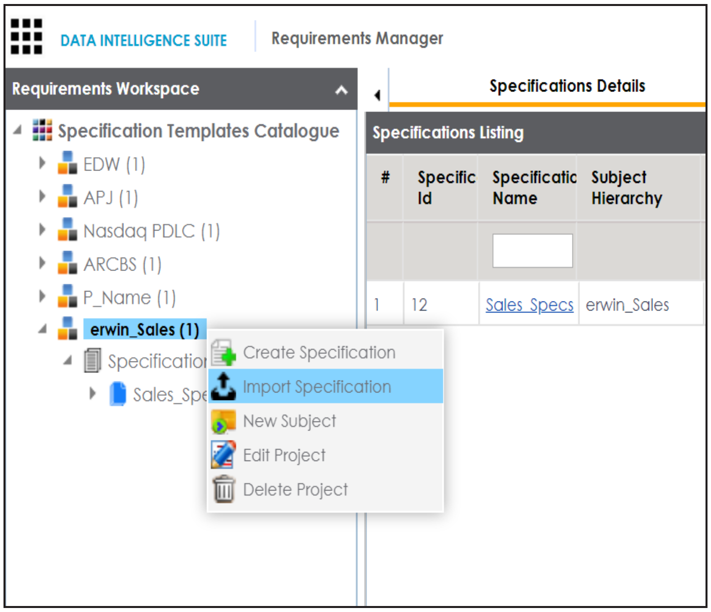
1. Unzip the exported specification.

   You will obtain the exported specification in the .xml format.

   Note: If you are importing the specification to the same project from where you exported the specification, 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. Right-click the desired project.



4. Click **Import Specification**.

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

6. Click .

   The Specification is created and saved in the Specifications tree.

Linking Requirements to Data Mappings

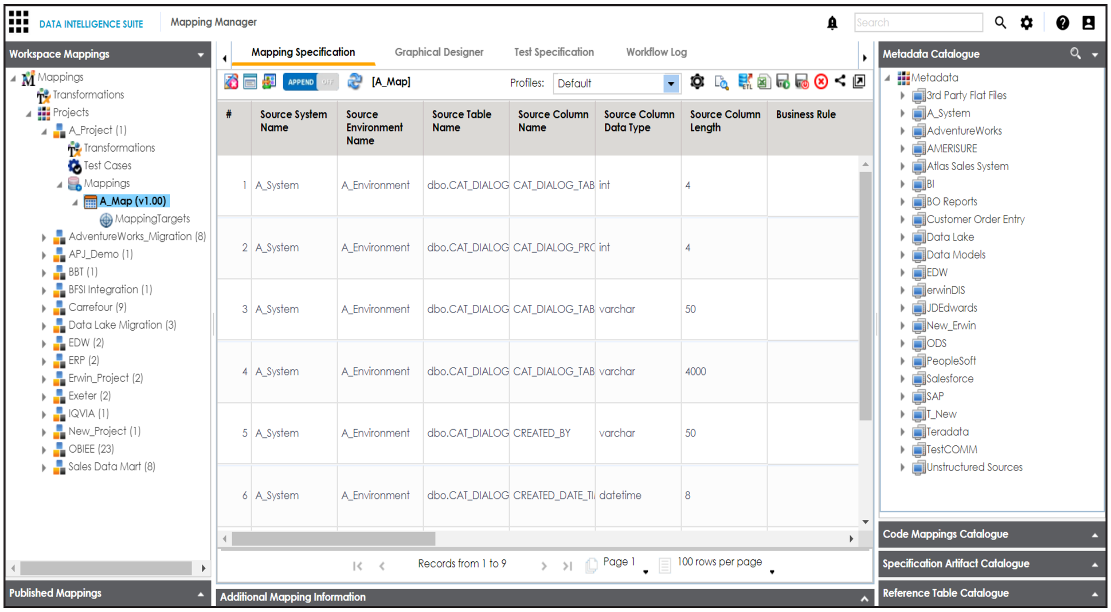
You can link your functional requirements to data mappings. This helps in enterprise level traceability between requirements and mappings.

To link your functional requirements to mappings, follow these steps:

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

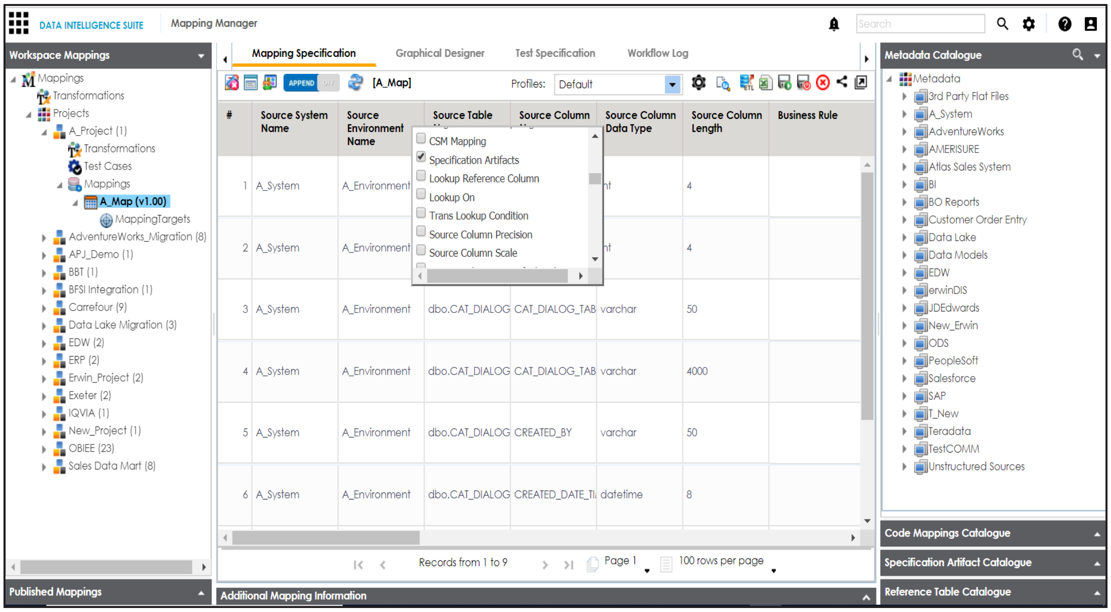
2. Click the required map.

   The Mapping specification page appears.



3. In **Mapping Specification**, right click the **Header Menu**.

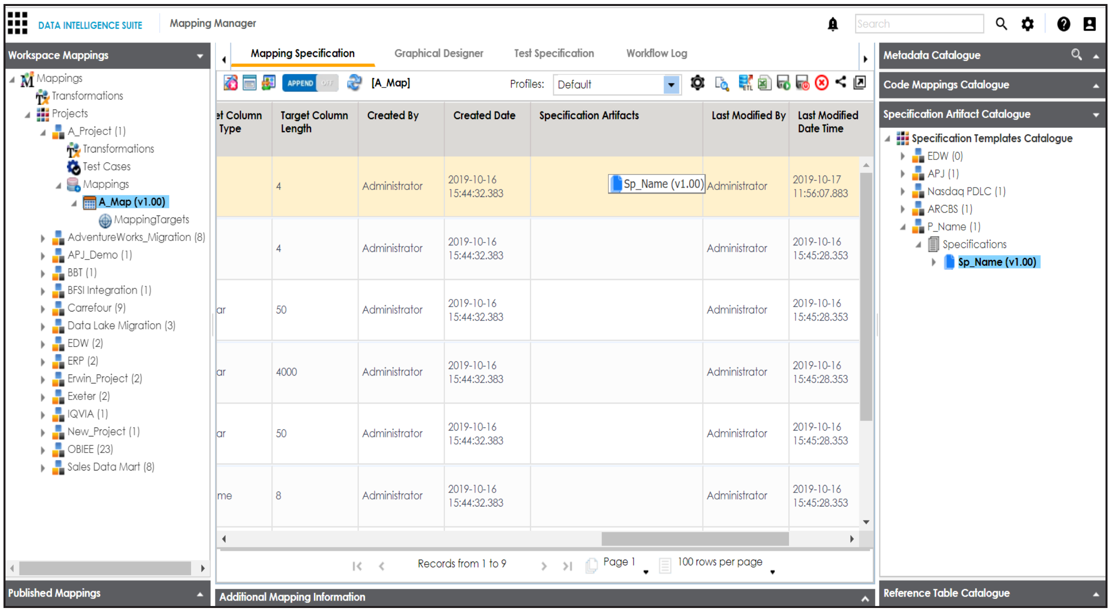
   A list of header columns appears.



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

   Specification Artifact column becomes visible in the Mapping Specification.

5. In right pane, expand **Specification Artifact Catalogue**.
6. In **Specification Artifact Catalogue**, expand the project node which contains the required specification.
7. Drag and drop the specification on the **Specification Artifacts** column in the required row.

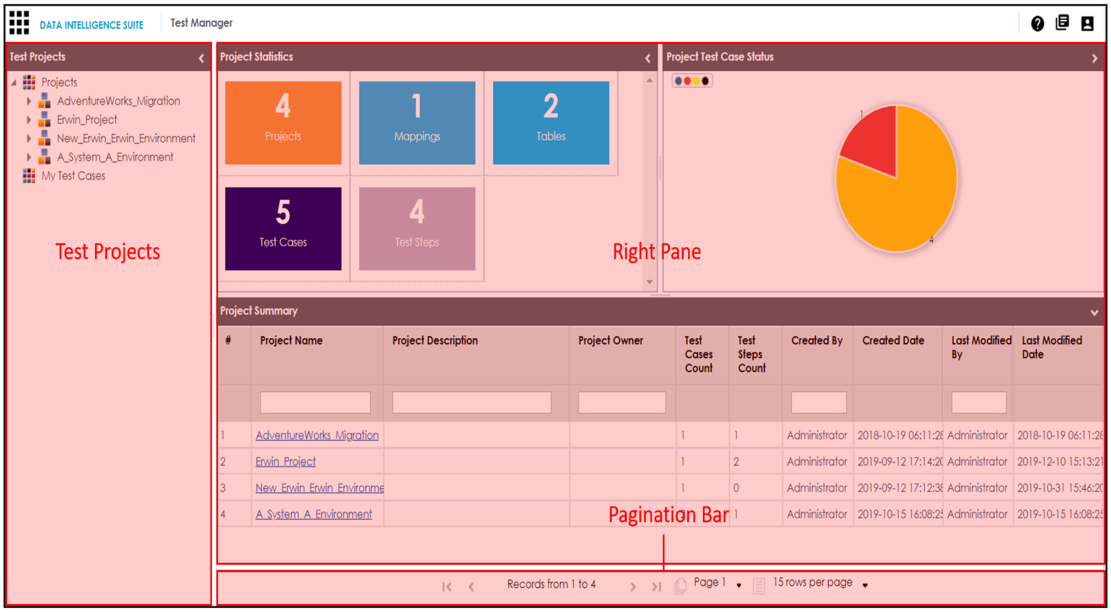


8. Click .

   Requirements are linked to the mappings.

Using Test Manager

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



UI Section	Icon	Function
Test Projects		Use this pane to browse through the test cases created in the Metadata Manager and the Mapping Manager. The test cases are categorized under projects.
Right Pane		Use this pane to view and analyze test cases. It displays data based on your selection in the Test Projects.
Pagination Bar	> >I I< < 20 rows per page Page 1	Use this bar to navigate through the data displayed.

You can create test cases in the Mapping Manager and Metadata Manager. Test Manager enables you to view and analyze these test cases at a single place.

Managing test cases involves the following:

- Creating and managing test cases for mappings
- Creating and managing metadata level test cases
- Viewing and analyzing test cases

Creating and Managing Test Cases for Mappings

You can create test cases for testing data mappings and ETL processes. The Mapping Manager enables you to create test cases at two levels:

- Project level
- Map level

The test cases created at project level are applicable to all the mappings created under the project. A map level test case is applicable to that particular map alone.

Creating and Managing Project Level Test Cases

You can define a test case at project level and update the test case as per your requirements.
The Mapping Manager enables you to create test specifications where you can specify:

- Type of testing
- Expected results
- Actual results
- SQL script

You can enrich a project level test case by:

- Adding validation steps to the test case
- Adding supporting documents

The project level test cases are stored in the Test Manager under a project having the same name as that of the project in the Mapping Manager.

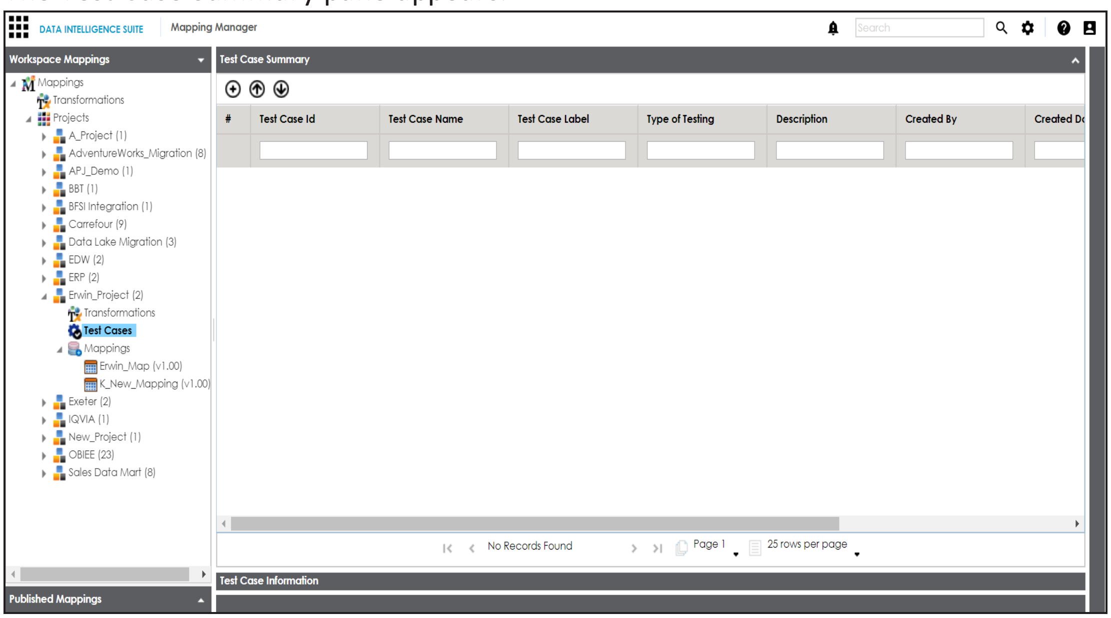
Creating Test Cases

You can create multiple test cases at project level in Mapping Manager and record expected and actual results. These test cases can test data mappings and ETL process. You can also manage test cases as per your requirements.

To create test cases at project level, follow these steps:

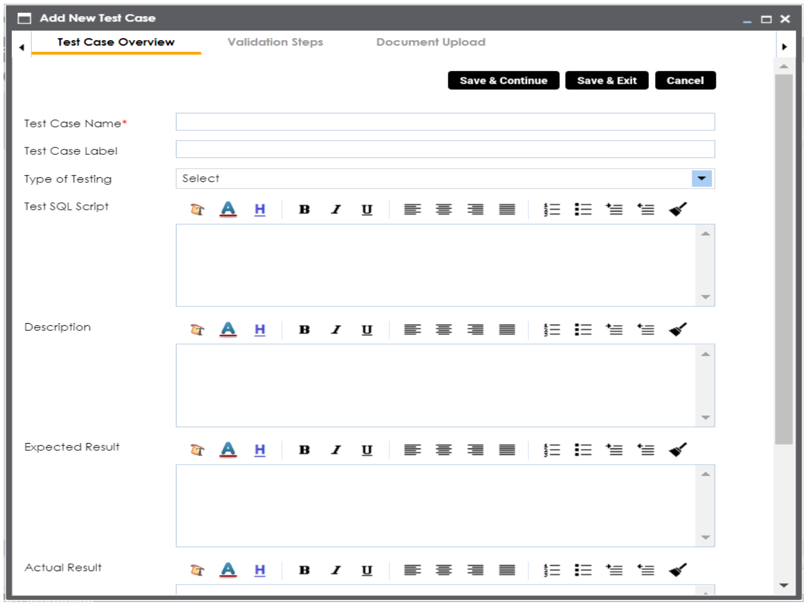
1. Go to **Application Menu** > **Data Catalog** > **Mapping Manager** > **Workspace Mappings**.
2. Under the **Workspace Mappings** pane, expand the required project node.
3. Click the **Test Cases** node.

   The Test Case Summary pane appears.

4. Click ⊕.

   The Add New Test Case page appears.



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
Test Case Name	Specifies the name of the test case. For example, Verifying the Completeness of Source Metadata.
Test Case Label	Specifies the unique label for the test case. For example, Source Metadata.
Type of Testing	Specifies the type of testing. For example, Metadata Testing.
Test SQL Script	Specifies the SQL script required in the test execution. For example, select * from dbo.ADS_ASSOCIATIONS.
Description	Specifies the test objective in brief. For example: The objective of the test case is to verify the completeness of source metadata.
Expected Result	Specifies the expected result of the test case in detail. For example: The source table should have 50 columns.
Actual Result	Specifies the actual test result after the execution of the test.

Field Name	Description
	For example: The source table has 39 columns.
Testing Comments	Specifies the testing comments about the test case. For example: The source metadata was scanned from a Sql Server database.

6. Click **Save and Exit**.

   The test case is created and saved under the **Test Cases** node.

Once the test case is created, you can enrich it by:

- Adding validation steps
- Adding documents

Managing test cases involves:

- Updating test cases
- Exporting test cases
- Deleting test cases

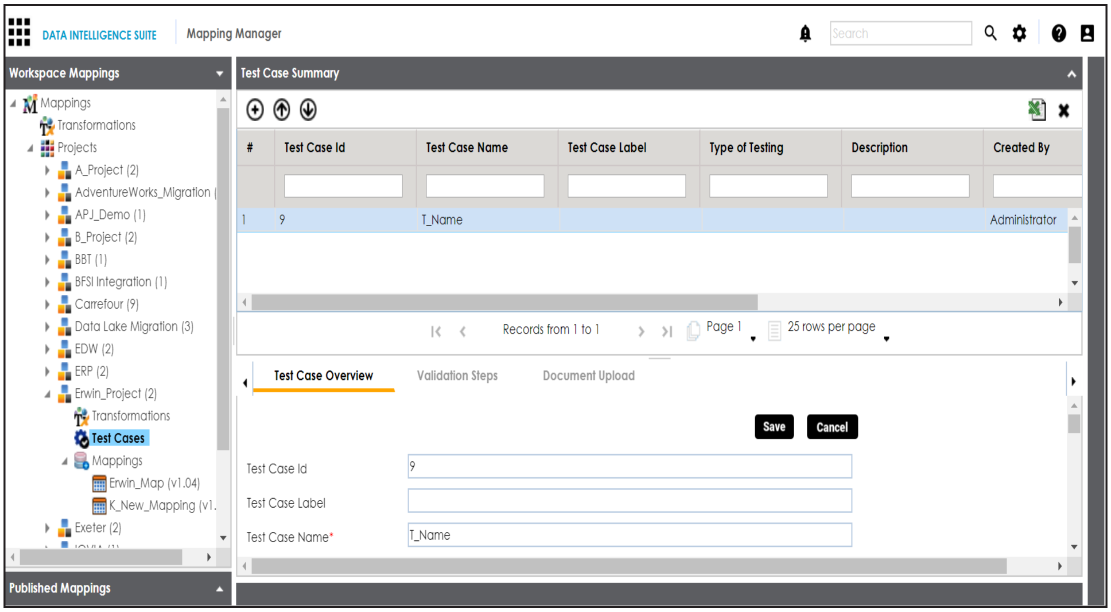
Adding Validation Steps

You can add multiple validation steps to a project level test case. You can also specify actual and expected results for each validation step.

To add validation steps to project level test cases, follow these steps:

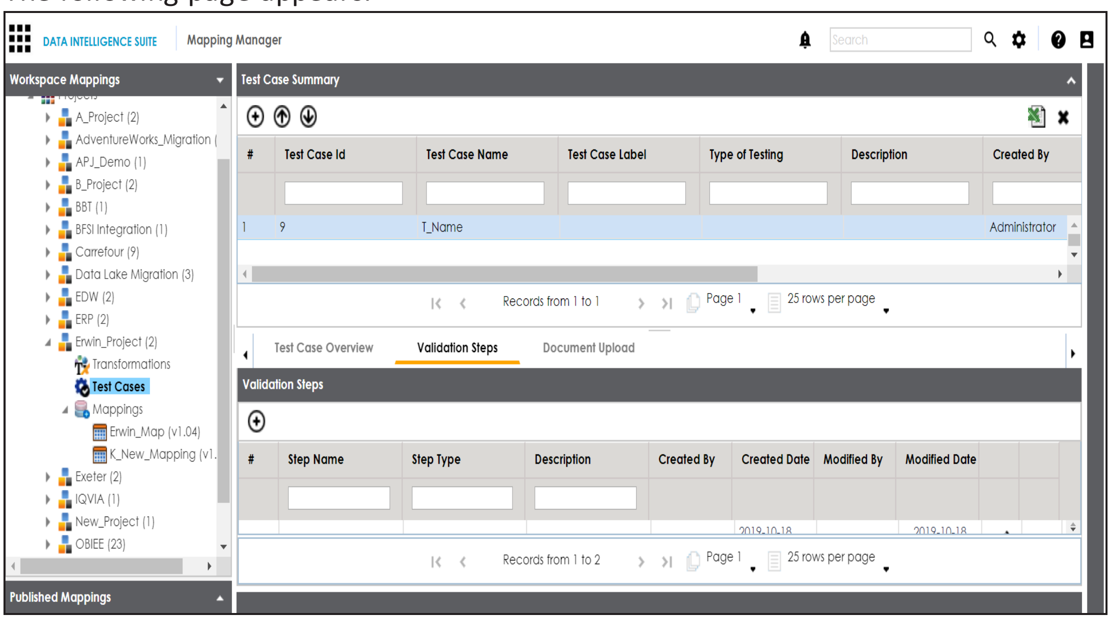
1. Under the **Workspace Mappings** pane, click the **Test Cases** node under the required project.

   The Test Case Summary page appears.



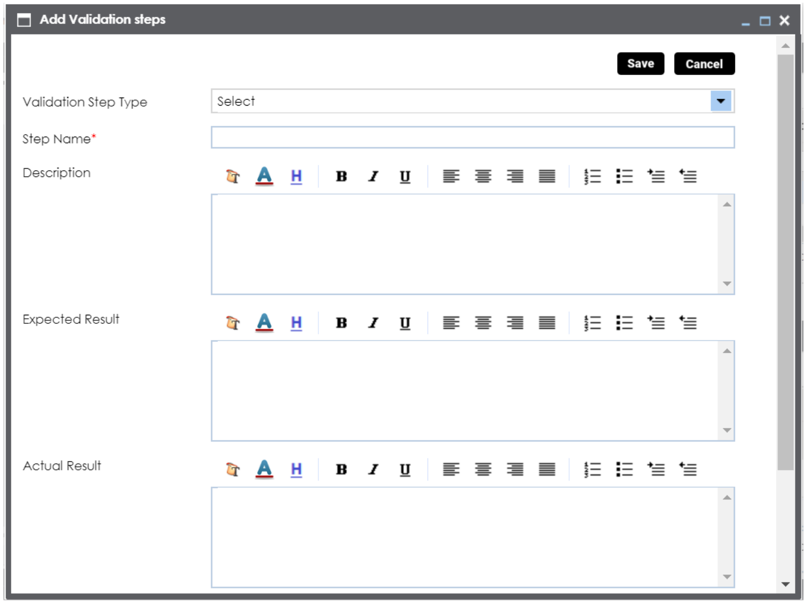
2. In the Bottom pane, click **Validation Steps**.

   The following page appears.



3. Click .

   The Add Validation Steps page appears.



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

Field Name	Description
Validation Step Type	Specifies the type of the validation step. For example, Data Check.
Step Name	Specifies the unique name of the step. For example, Validating Number of Columns.
Description	Specifies the description about the validation step. For example: This step validates the number of columns in the source metadata.
Expected Result	Specifies the expected result in detail. For example: The source table, dbo.ADS_ASSOCIATIONS should have 50 columns.
Actual Result	Specifies the actual test result after the execution of the test. For example: The source table contains 50 columns.
Test Step Comments	Specifies the comments about the step. For example: The source metadata was scanned from a Sql Server

Field Name	Description
	database.

5. Click **Save**.

   The validation step is added to the test case.

Uploading Documents

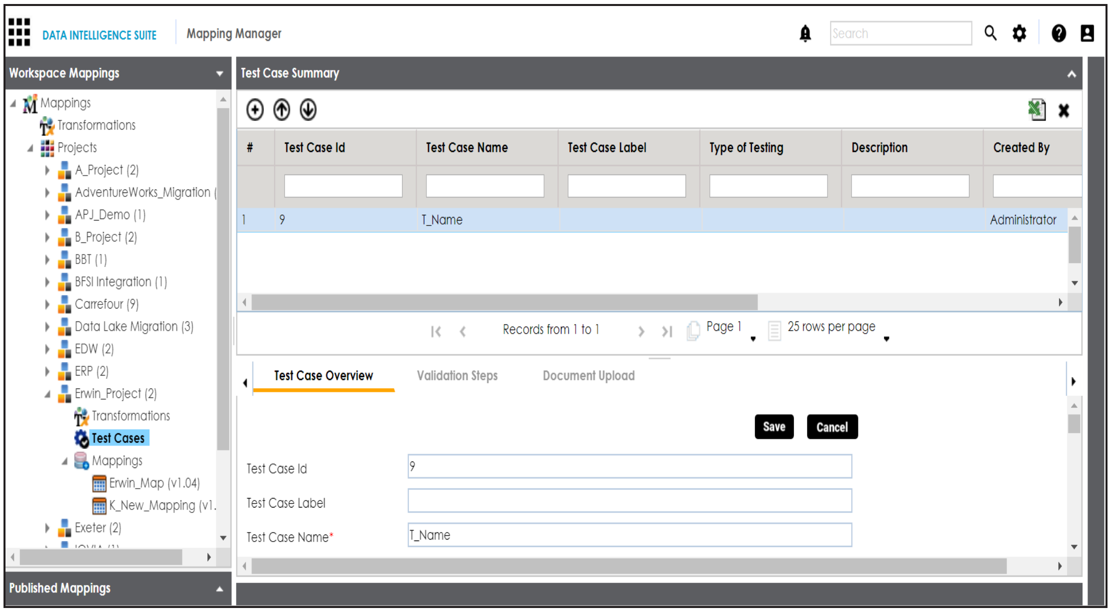
You can upload supporting documents to a project level test case and describe its intended use. You can also specify:

- Document name
- Document owner
- Document link
- Document status

To upload documents to project level test cases, follow these steps:

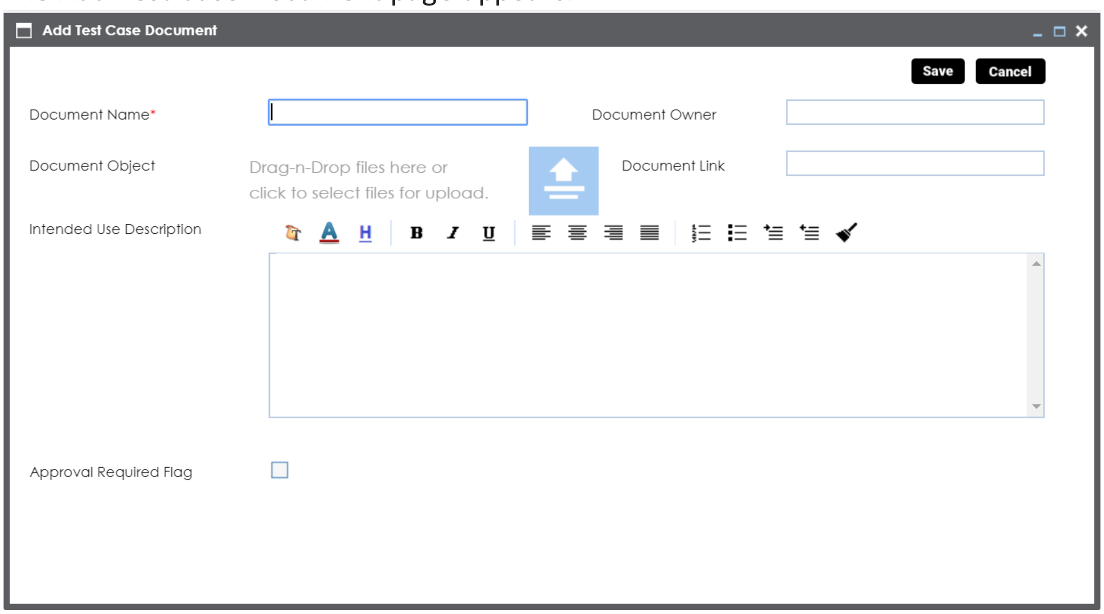
1. Under the **Workspace Mappings** pane, click the **Test Cases** node under the required project.

   The Test Case Summary page appears.



2. In the Bottom pane, click **Document Upload** and click .

   The Add Test Case Document page appears.

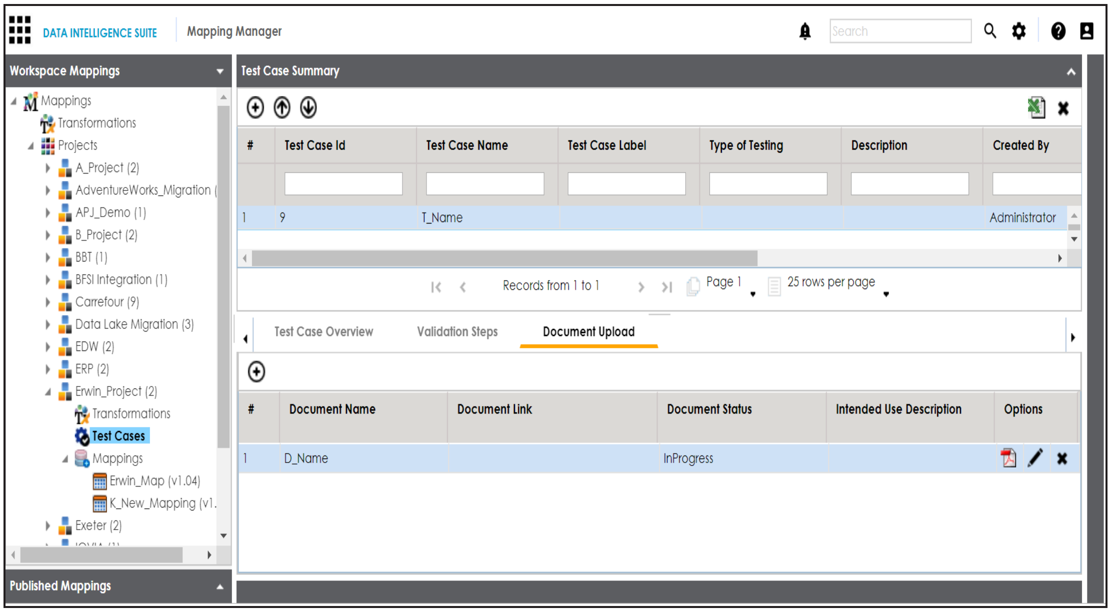


3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Document Name	Specifies the name of the physical document being attached to the test case. For example, Source Metadata Details.
Document Object	Drag and drop document files or use to select and upload document files.
Document Owner	Specifies the document owner's name. For example, John Doe.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Intended Use Description	Specifies the intended use of the document. For example: The document has information about the source metadata.
Approval Required Flag	Specifies whether the document requires approval. Select the **Approval Required Flag** check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

4. Click **Save**.

   The document is added to the test case and saved under the **Document Upload** tab.



5. To edit the test case document, click ✎.

6. To remove the test case document, click ✖.

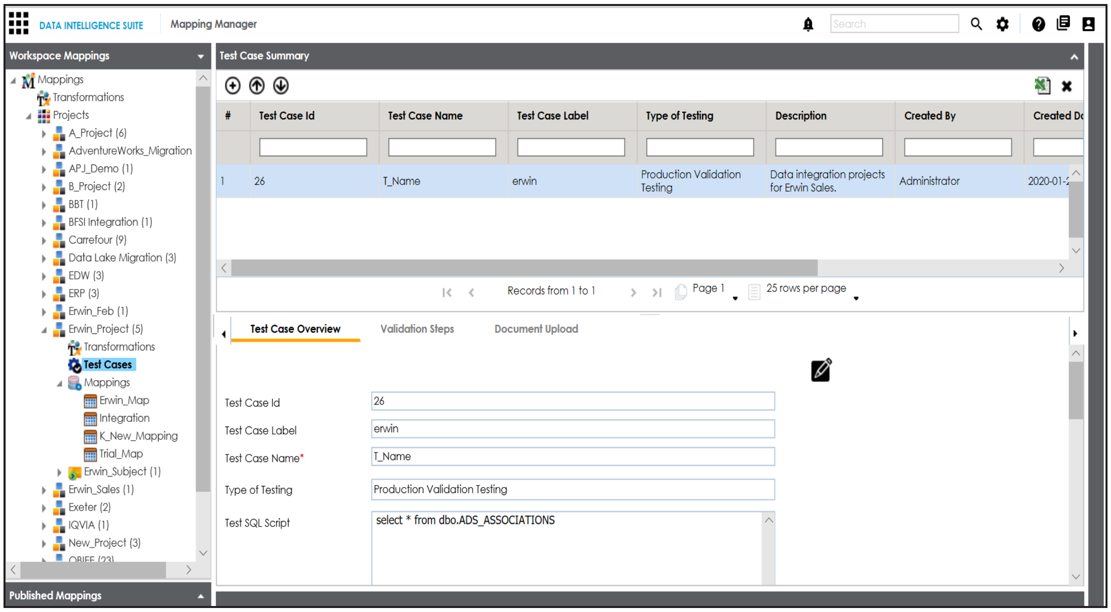
Managing Test Cases

Managing test cases involves:

- Updating test cases
- Exporting test cases
- Deleting test cases

To update test cases, follow these steps:

1. Under the **Workspace Mappings** pane, click the **Test Cases** node under the required project.



2. In the **Test Case Summary** pane, click the required test case.

3. In the **Test Case Overview** tab, click .

   You can update the fields of the test case.

To export a test case, click the test case in the **Test Case Summary** pane, and click .

To delete a test case, click the test case in the **Test Case Summary** pane, and click .

Creating and Managing Map Level Test Cases

You can define a test case at map level and update the test case as per your requirements. The Mapping Manager enables you to create test specifications where you can specify:

- Type of testing
- Expected results
- Actual results
- SQL script

You can enrich a map level test case by:

- Adding validation steps to the test case
- Adding supporting documents

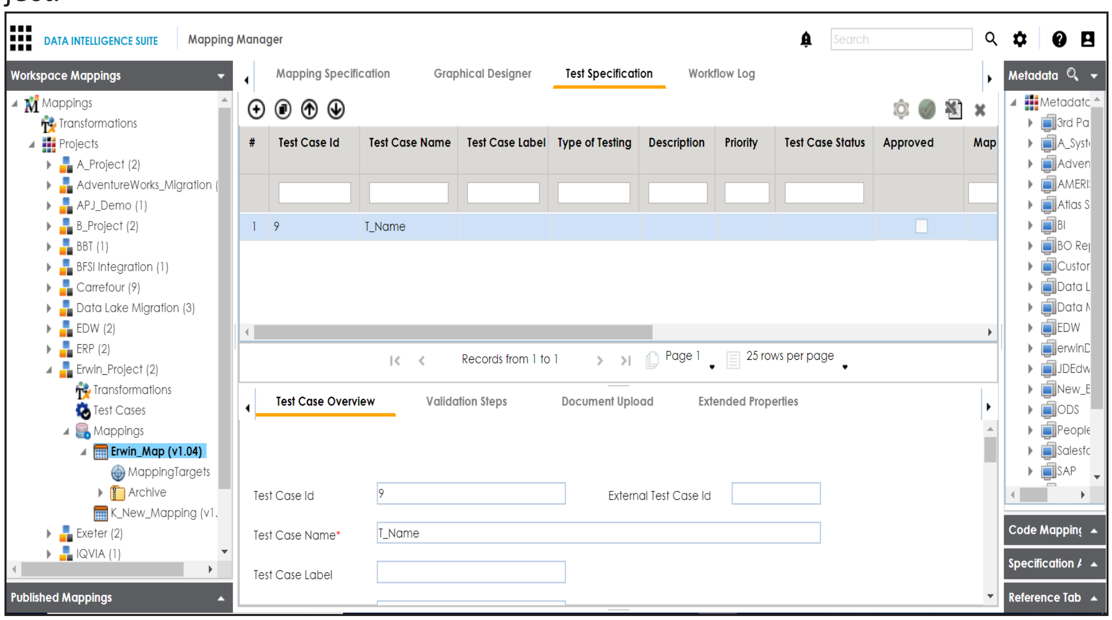
Creating Test Cases

You can create test cases at map level to give a testing procedure more granularity.

To create test cases at map level, follow these steps:

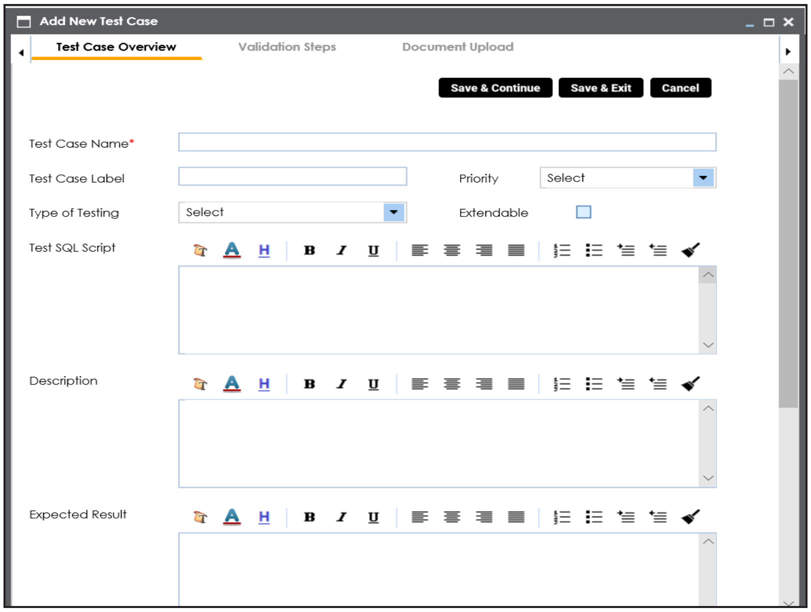
1. Go to **Application Menu** > **Data Catalog** > **Mapping Manager** > **Workspace Map-pings**.
2. Click the required map and click the **Test Specification** tab.

   The following page appears. You can see a test case which was [created at project level](). Test cases created at project level are applicable to all the maps under the pro-ject.



3. Click .

   The Add New Test Case page appears.



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

Field Name	Description
Test Case Name	Specifies the name of the test case. For example, Verifying the Completeness of Source Metadata.
Test Case Label	Specifies the unique label for the test case. For example, Source Metadata.
Priority	Specifies the priority of the test case. For example, High. Priority for business rules and functional test cases can be medium or higher.
Type of Testing	Specifies the type of testing. For example, Metadata Testing.
Extendable	Specifies whether the test case is visible even when this map is archived. A map is archived whenever you create a new version of the map.
Test SQL Script	Specifies the SQL script required in the test execution. For example, select * from dbo.ADS_ASSOCIATIONS.

Field Name	Description
Description	Specifies the test objective in brief. For example: The objective of the test case is to verify the com-pleteness of source metadata.
Expected Res-ult	Specifies the expected result of the test case in detail. For example: The source table should have 50 columns.
Actual Result	Specifies the actual test result after the execution of the test. For example: The source table has 39 columns.
Testing Com-ments	Specifies the testing comments about the test case. For example: The source metadata was scanned from a Sql Server data-base.
Test Case Status	Specifies the status of the test case. For example, Passed.
Approved	Specifies whether the test case is approved.

5. Click **Save and Exit**.

   The test case is added under the Test Specification tab.

Once a test case is created, you can enrich it by:

- Adding validation steps
- Adding documents

Managing test cases involves:

- Updating test case status
- Approving test cases
- Exporting test cases
- Deleting test cases

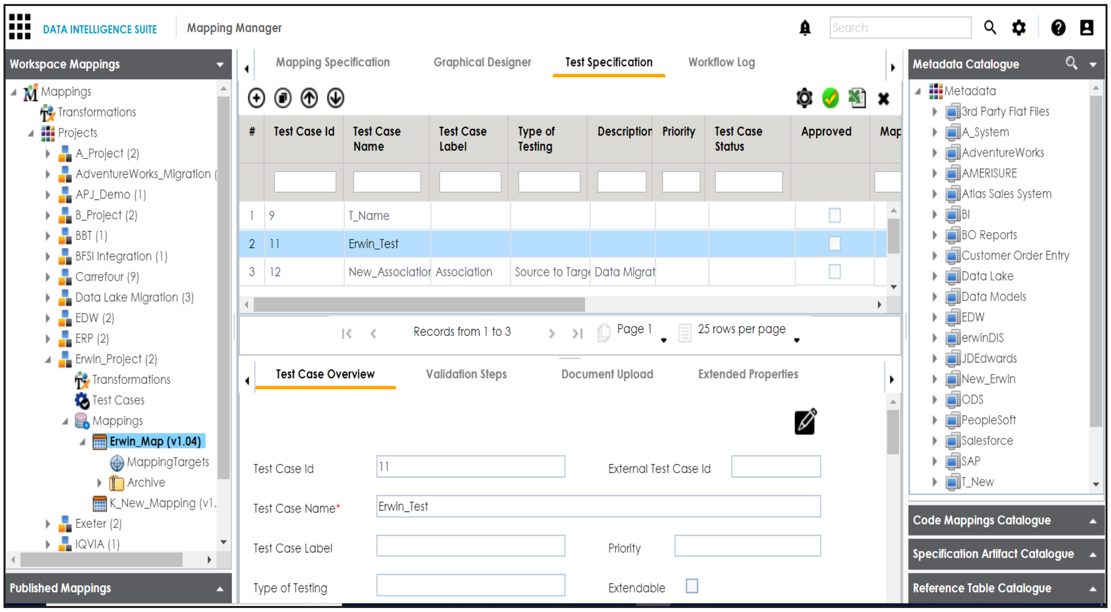
Adding Validation Steps

You can add multiple validation steps to a map level test case. You can also specify actual and expected results for each validation step.

To add validation steps to map level test cases, follow these steps:

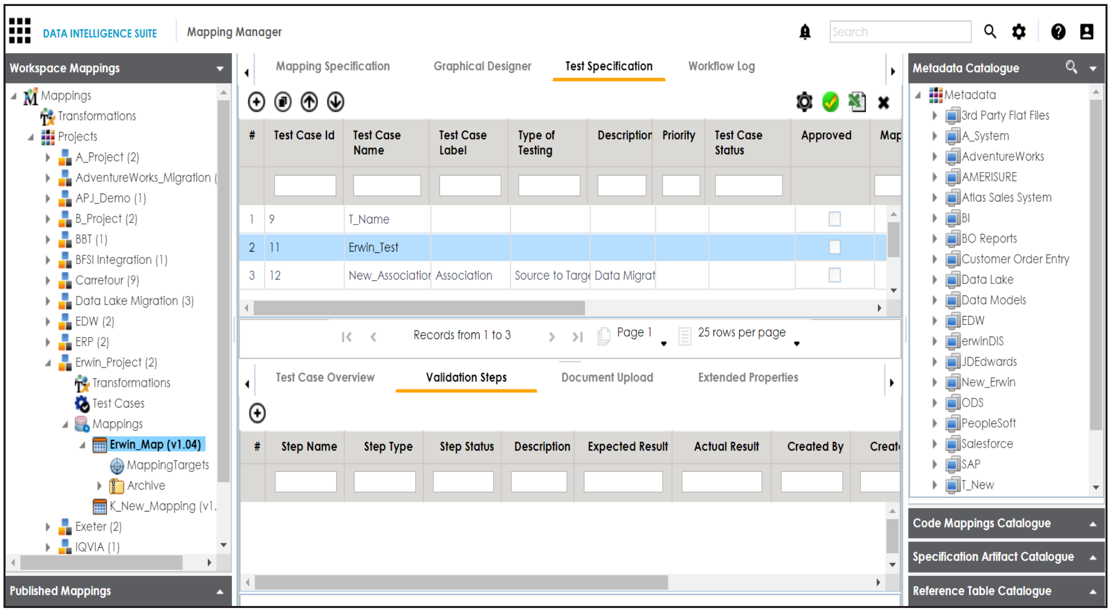
1. Under the **Workspace Mappings** pane, click the required map and click the **Test Specification** tab.
2. Double-click the required map level test case.

   The Test Case Overview tab appears.

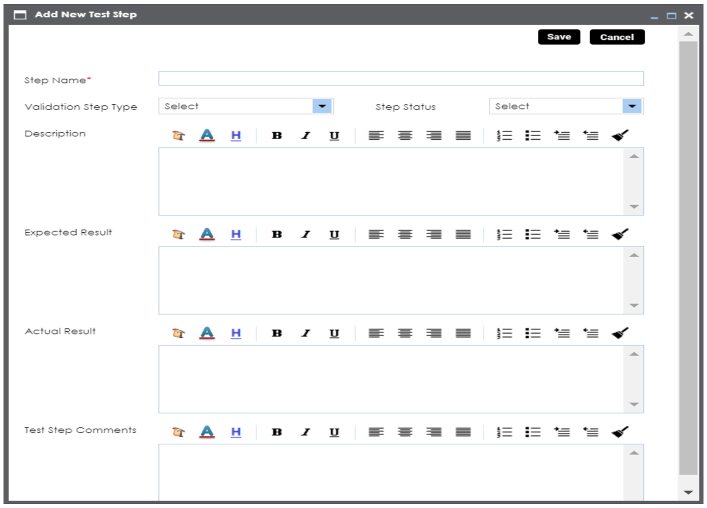
3. Click the **Validation Steps** tab.

   The Validations Step tab appears.



4. Click .

   The Add New Step page appears.



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
Step Name	Specifies the unique name of the step.

Field Name	Description
	For example, Validating Number of Columns.
Validation Step Type	Specifies the type of the validation step. For example, Data Check.
Step Status	Specifies the status of the step. For example, Passed.
Description	Specifies the description about the validation step. For example: This step validates the number of columns in the source metadata.
Expected Result	Specifies the expected result in detail. For example: The source table, dbo.ADS_ASSOCIATIONS should have 50 columns.
Actual Result	Specifies the actual test result after the execution of the test. For example: The source table contains 50 columns.
Expected Result	Enter the expected result in detail, including the error-message that is displayed on screen.
Test Step Comments	Specifies the comments about the step. For example: The source metadata was scanned from a Sql Server database.

6. Click **Save**.

   The validation step is added to the test case.

Uploading Documents

You can upload supporting documents to a map level test case and describe its intended use.

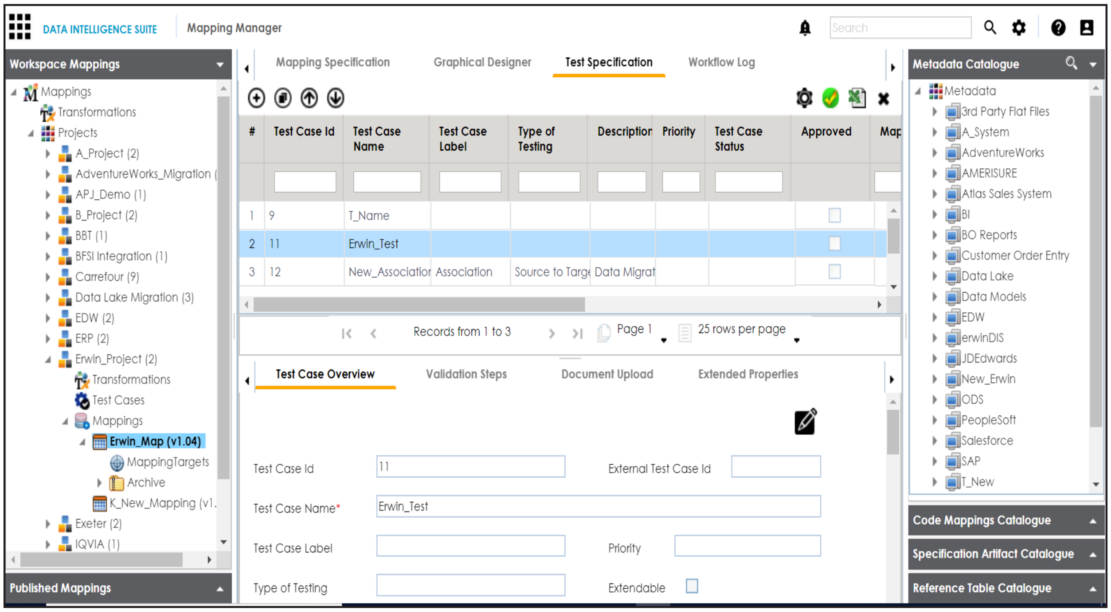
You can also specify:

- Document name
- Document owner
- Document link
- Document status

To add documents to map level test cases, follow these steps:

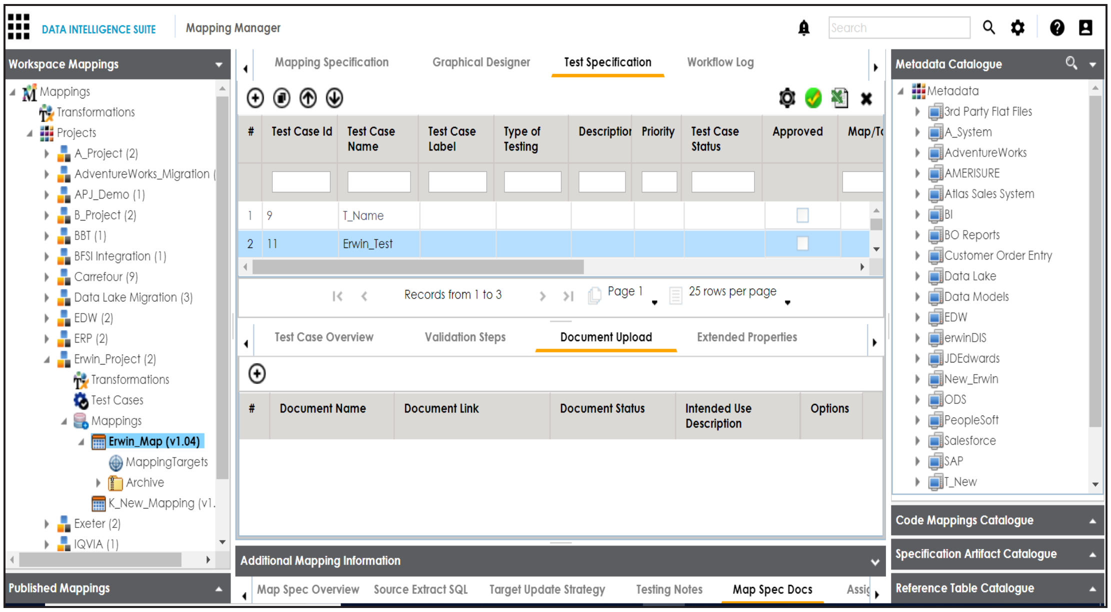
1. Under the **Workspace Mappings** pane, click the required map and click the **Test Specification** tab.
2. Double-click the required map level test case.

   The Test Overview page appears.



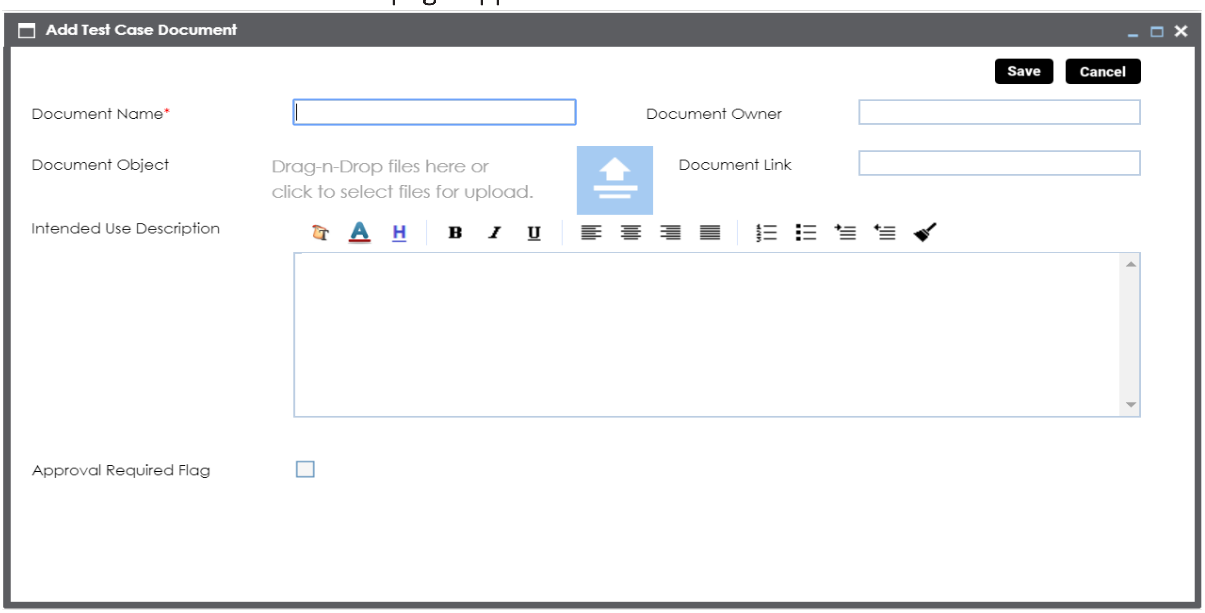
3. Click the **Document Upload** tab.

   The following page appears.



4. Click ⊕.

The Add Test Case Document page appears.



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
Document Name	Specifies the name of the physical document being attached to the test case. For example, Source Metadata Details.
Document Object	Drag and drop document files or use to select and upload document files.
Document Owner	Specifies the document owner's name. For example, John Doe.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Intended Use Description	Specifies the intended use of the document. For example: The document has information about the source metadata.
Approval Required Flag	Specifies whether the document requires approval. Select the **Approval Required Flag** check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

6. Click **Save**.

   The document is added to the test case.

Managing Test Cases

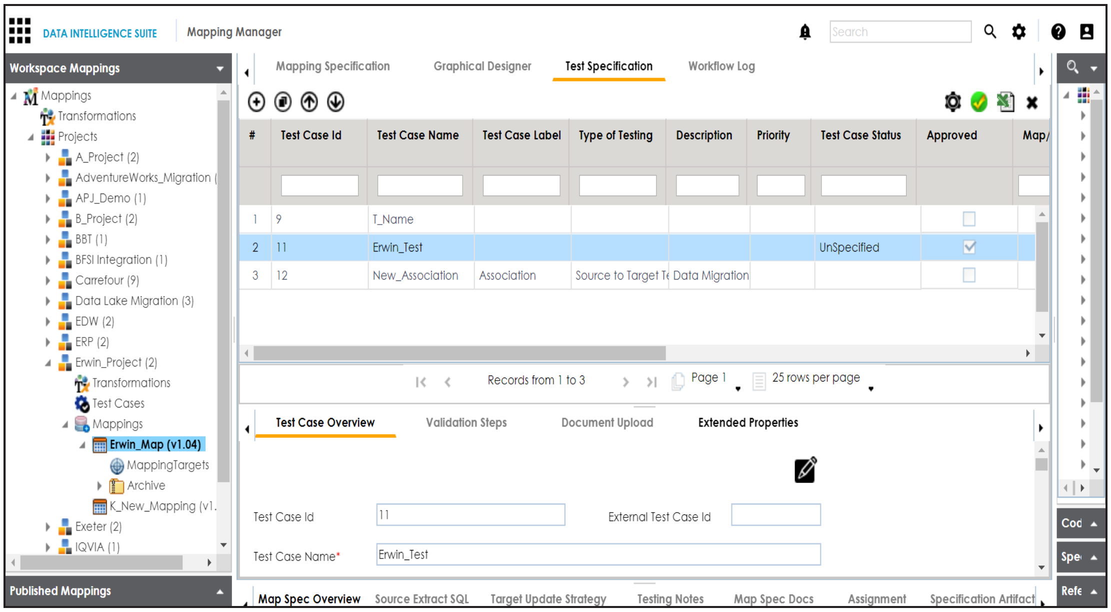
Managing test cases involves:

- Updating test case status
- Approving test cases

- Exporting test cases
- Deleting test cases

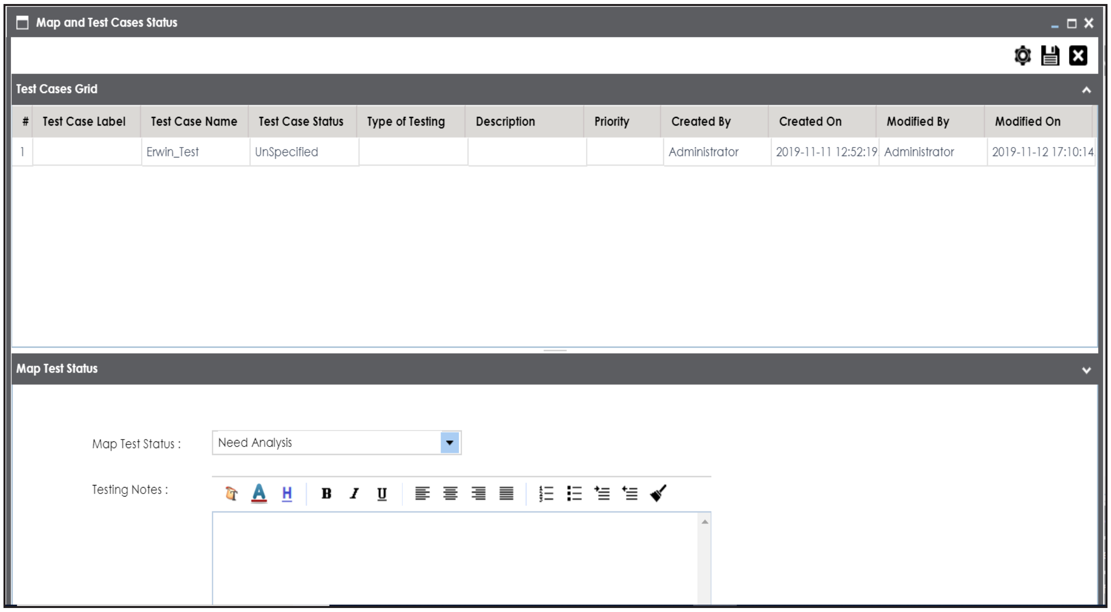
To update test case status, follow these steps:

1. Under the **Workspace Mappings** pane, click the required map and click the **Test Specification** tab.



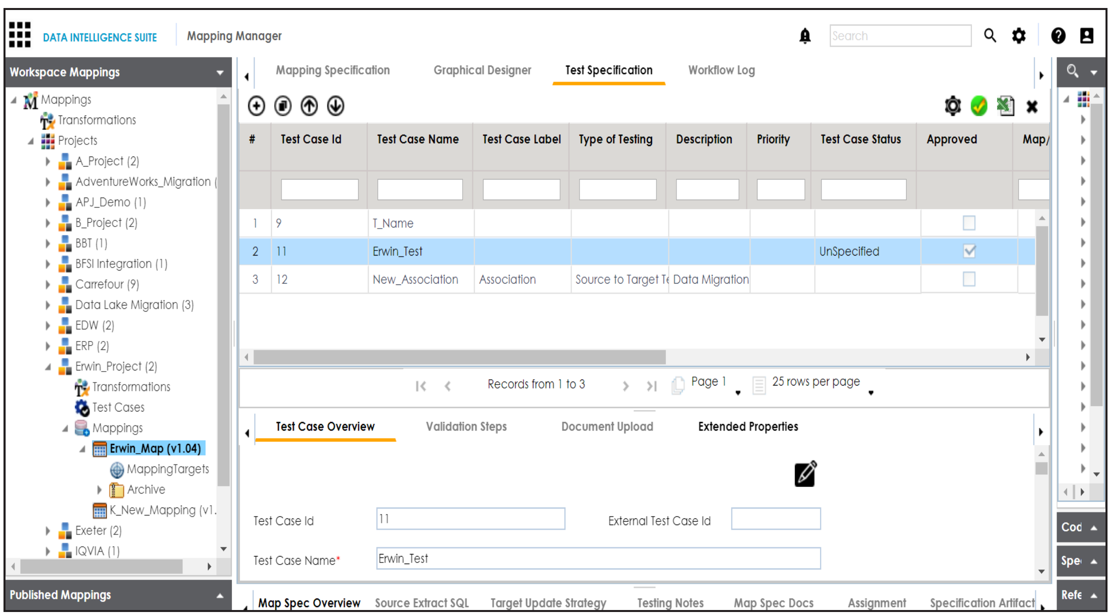
2. Click .

   The Map and Test Cases Status page appears. You can update test case status in the Test Cases Grid and Map Test Status in the bottom pane.



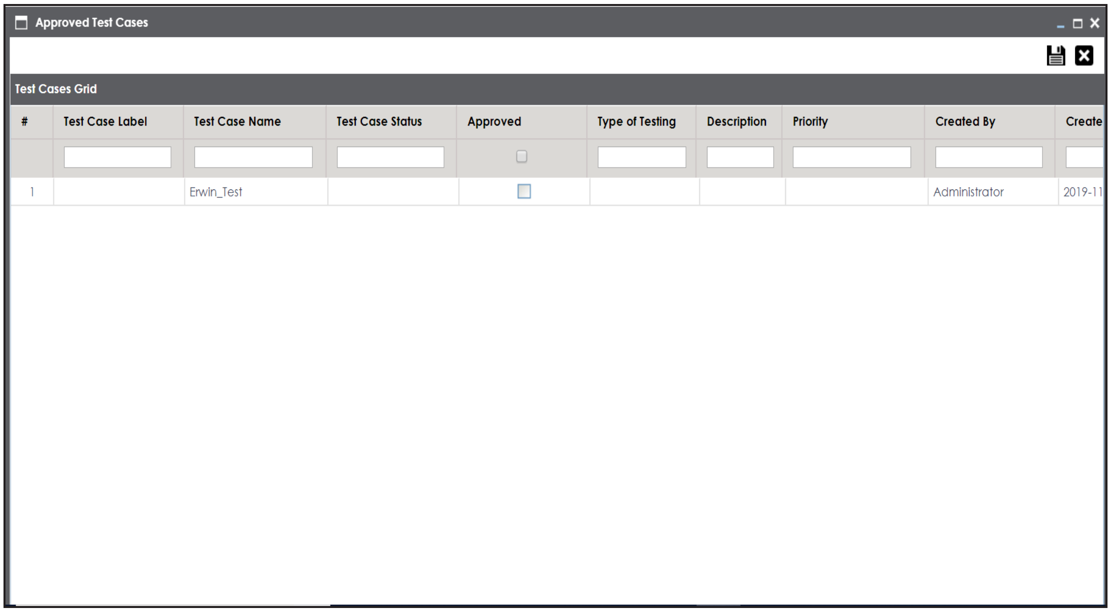
To approve map level test cases, follow these steps:

1. Under the **Workspace Mappings** pane, click the required map and click the **Test Specification** tab.



2. Click ⚙.

   The Approved Test Cases page appears.

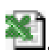


3. Select the check box against the test case under the **Approved** column.

To export map level test cases, follow these steps:

1. Under the **Workspace Mappings** pane, click the required map and click the **Test Specification** tab.

2. In the **Test Specification** tab, click the required map level test case.

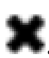
3. Click .

The test case is exported in the .xlsx file.

To delete map level test cases, follow these steps:

1. Under the **Workspace Mappings** pane, click the required map and click the **Test Specification** tab.

2. In the **Test Specification** tab, click the required map level test case.

3. Click .

The test case is deleted.

Creating and Managing Metadata Level Test Cases

You can define a test case at metadata level and update the test case as per your requirements.
The Metadata Manager enables you to create test specifications where you can specify:

- Type of testing
- Expected results
- Actual results
- SQL script

You can enrich a metadata level test case by:

- Adding validation steps to the test case
- Adding supporting documents

The metadata level test cases are stored in the Test Manager under a project having a name which follows the nomenclature as <System_Name>_<Environment_Name>.

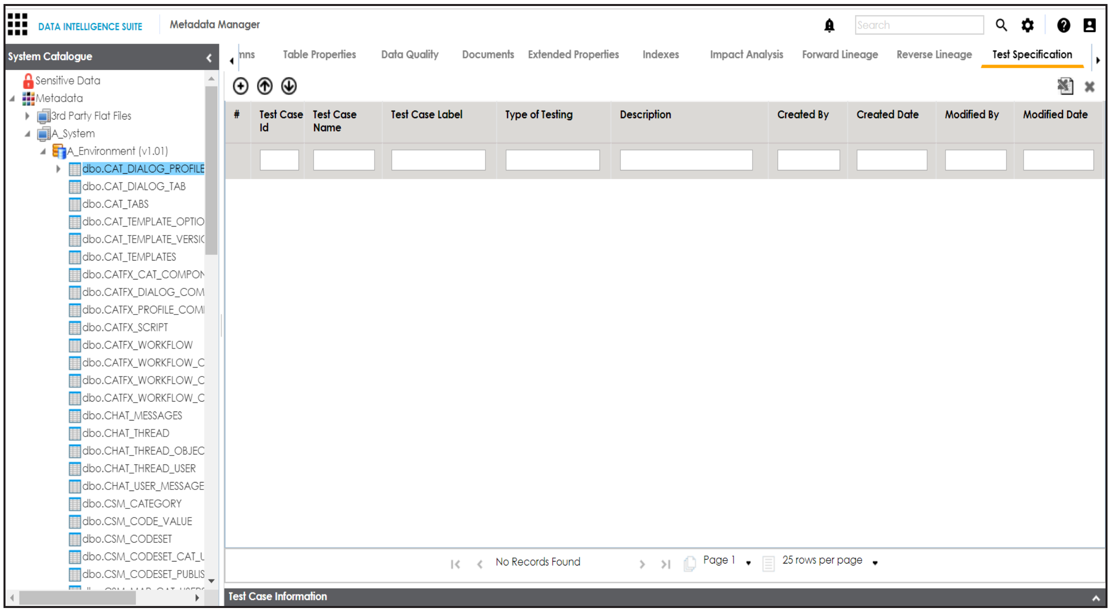
Creating Test Cases

You can create test cases at metadata level (table level) using the Metadata Manager. You can also add multiple validation steps to these test cases and enrich it by adding supporting documents.

To create test cases at metadata level, follow these steps:

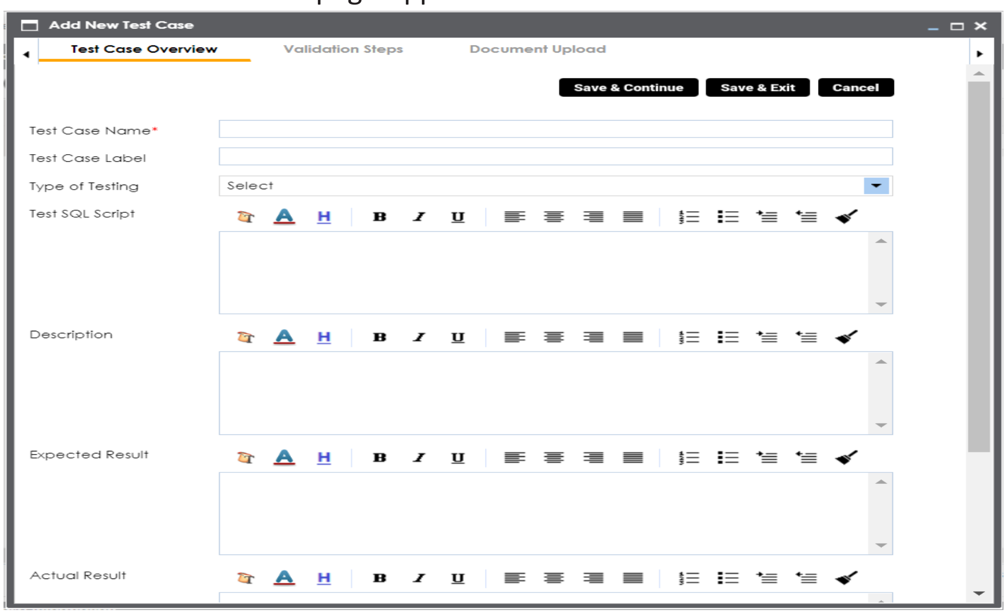
1. Go to **Application Menu** > **Data Catalog** > **Metadata Manager**.
2. Under the **System Catalogue** pane, click the required table.
3. Click the **Test Specification** tab.

   The following page appears.



4. Click .

The Add New Test Case page appears.



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
Test Case Name	Specifies the name of the test case. For example, Verifying Log in Page.
Test Case Label	Specifies the unique label for the test case. For example, Log in Page.
Type of Testing	Specifies the type of testing. For example, PERFORMANCE-TEST.
Test SQL Script	Specifies the SQL script required in the test execution. For example, select * from dbo.RM_Resource.
Description	Specifies the test objective in brief. For example: The objective of the test case is to verify log in page with valid user name and password.
Expected Result	Specifies the expected result of the test case in detail. For example: All the users can log on to erwin DI Suite with their user name and password.
Actual Result	Specifies the actual test result after the execution of the test. For example: One user cannot log on to erwin DI Suite.
Testing Comments	Specifies the testing comments about the test case. For example: The user name and passwords are saved in the dbo.RM_Resource table.

6. Click **Save and Exit**.

   The test case is created.

Once the test case is created, you can enrich it further by:

- Adding validation steps
- Adding documents

Managing test cases involves:

- Updating test cases
- Exporting test cases
- Deleting test cases

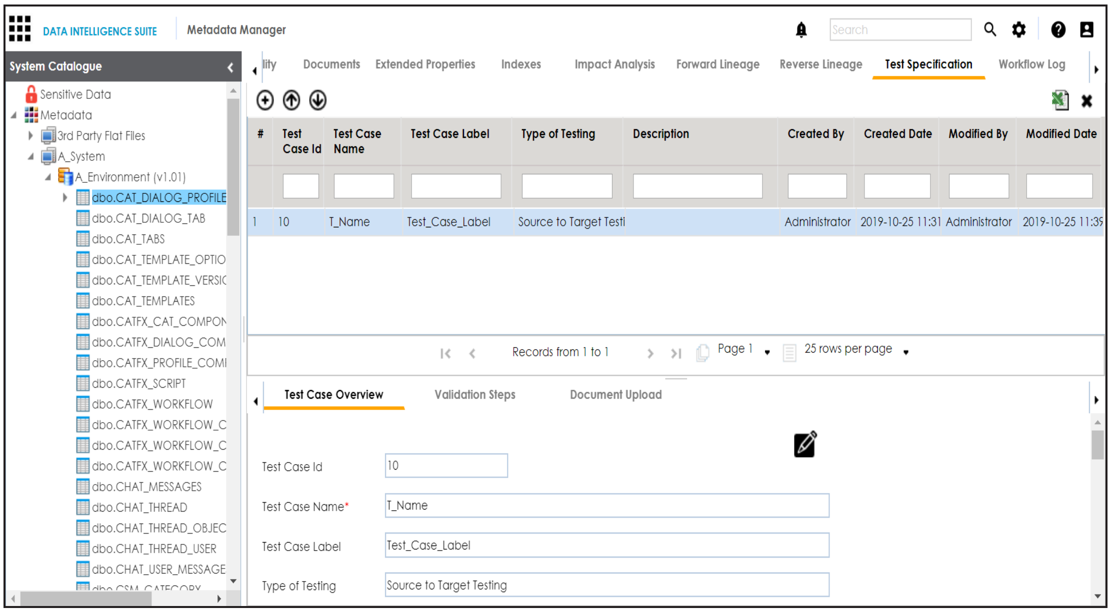
Adding Validation Steps

You can add multiple validation steps to a metadata level test case. You can also specify actual and expected results for each validation step.

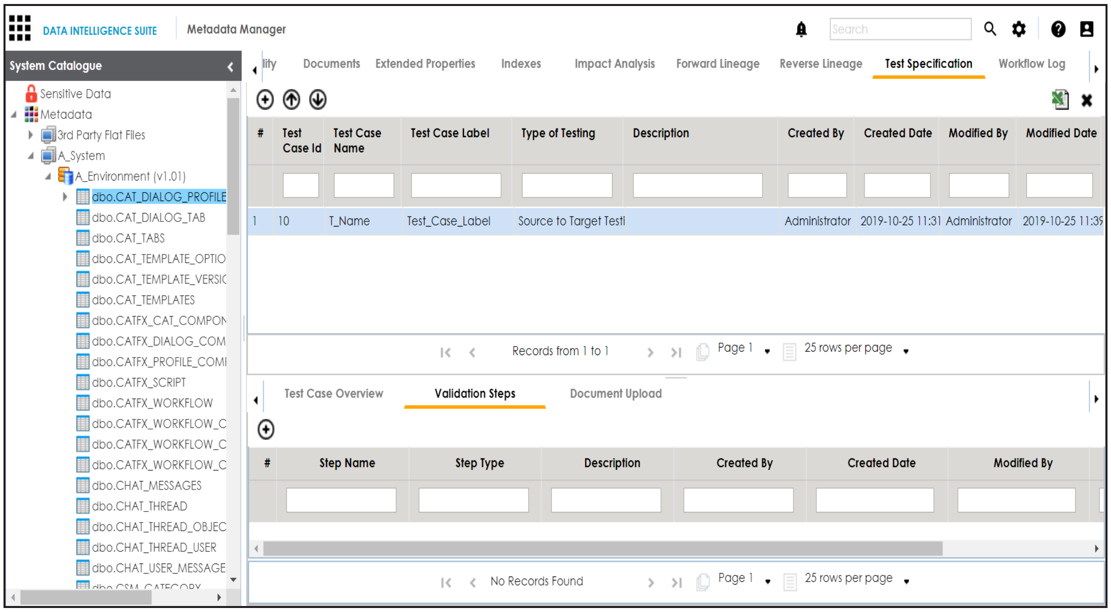
To add validation steps to metadata level test cases, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Metadata Manager**.
2. In **System Catalogue**, click the desired table and click the Test Specification tab.

   The Test Case Overview appears.

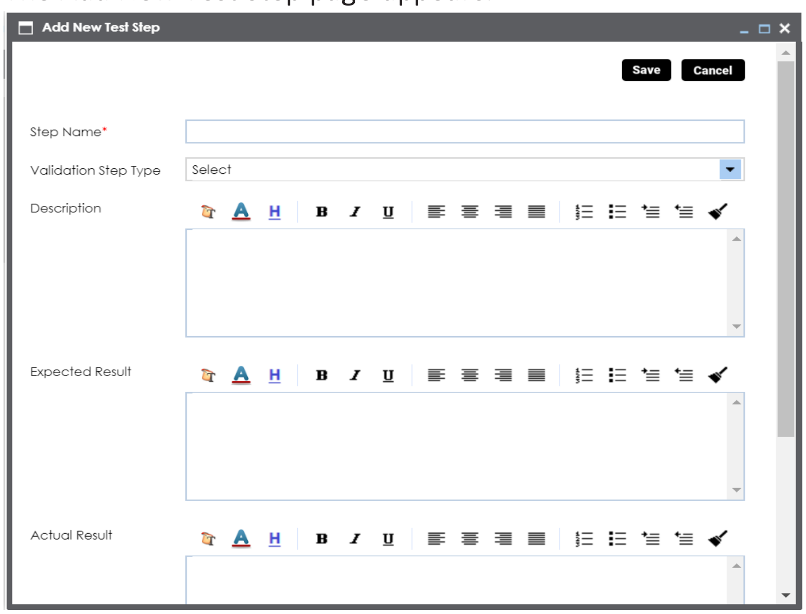
   

3. Click **Validation Steps**.



4. Click ⊕.

The Add New Test Step page appears.



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

Field Name	Description
Validation Step Type	Select the validation step type from the drop down.
Step Name	Enter an unique name of each step.
Description	Describe the object in brief.
Expected Result	Enter the SQL script to run the test case.
Actual Result	Enter the actual test result after the execution of the test.
Expected Result	Enter the expected result in detail, including the error-message that is displayed on screen.
Test Step Comments	Enter relevant test step comments.

6. Click **Save**.

   The validation step is added to the test case and saved under the Validation Steps tab.

Uploading Documents

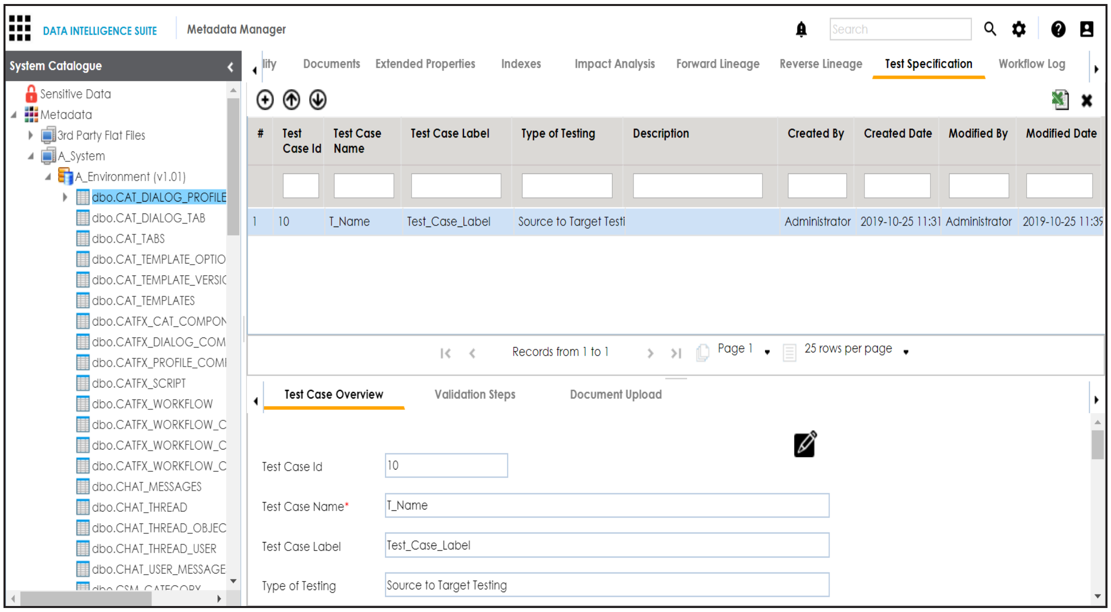
You can upload supporting documents to a metadata level test case and describe its intended use. You can also specify:

- Document name
- Document owner
- Document link
- Document status

To upload documents to metadata level test cases, follow these steps:

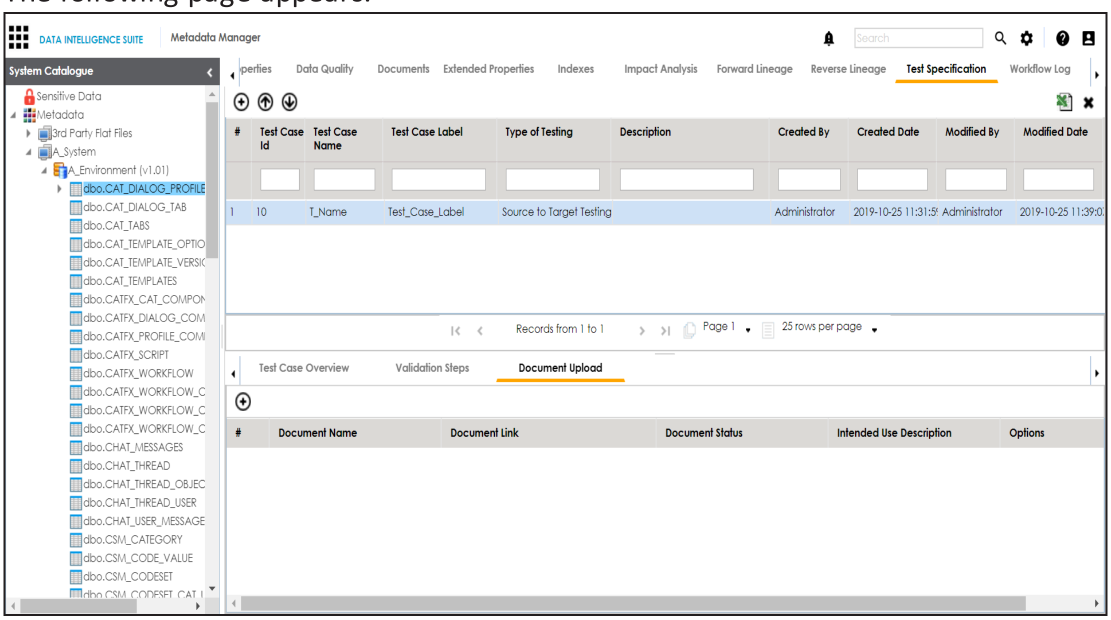
1. Under the **System Catalogue** pane, click the required table and click the **Test Specification** tab.

   The Test Case Overview appears.



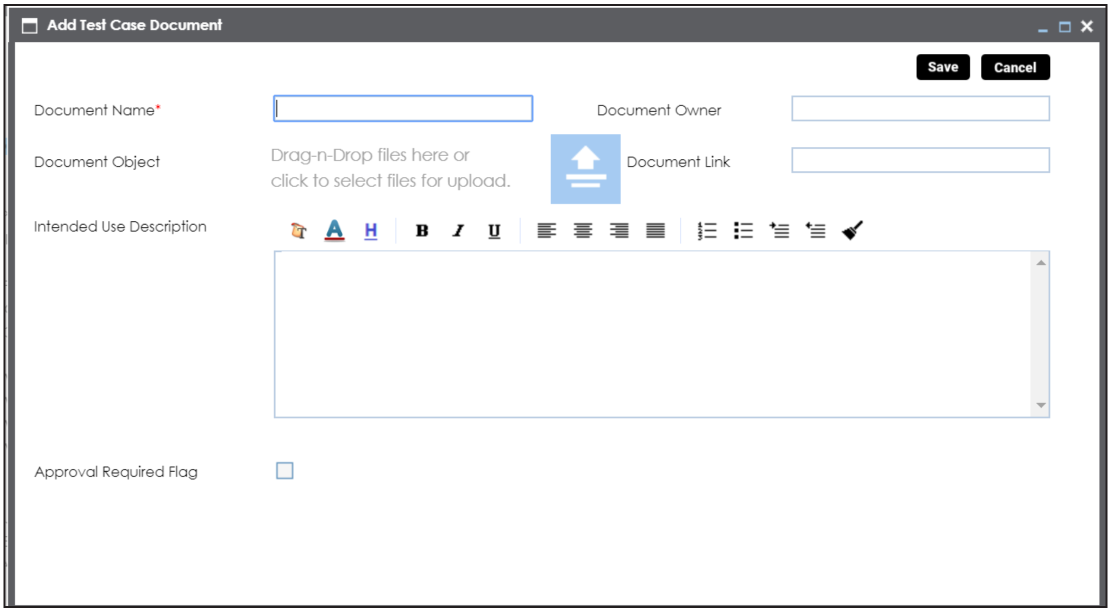
2. Click **Document Upload**.

The following page appears.



3. Click .

The Add Test Case Document page appears.



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

Field Name	Description
Document Name	Specifies the name of the physical document being attached to the test case. For example, Resource Details.
Document Object	Drag and drop document files or use  to select and upload document files.
Document Owner	Specifies the document owner's name. For example, John Doe.
Document Link	Specifies the URL of the document. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOnb5YkMBq4ptA7jhg5/view
Intended Use Description	Specifies the intended use of the document. For example: The document has information about the resources of the application.
Approval	Specifies whether the document requires approval.

Field Name	Description
Required Flag	Select the **Approval Required Flag** check box to select the document status.
Document Status	Specifies the status of the document. For example, In Progress. This field is available only when the **Approval Required Flag** check box is selected.

5. Click **Save**.

   The document is added to the test case and saved under the Document Upload tab.

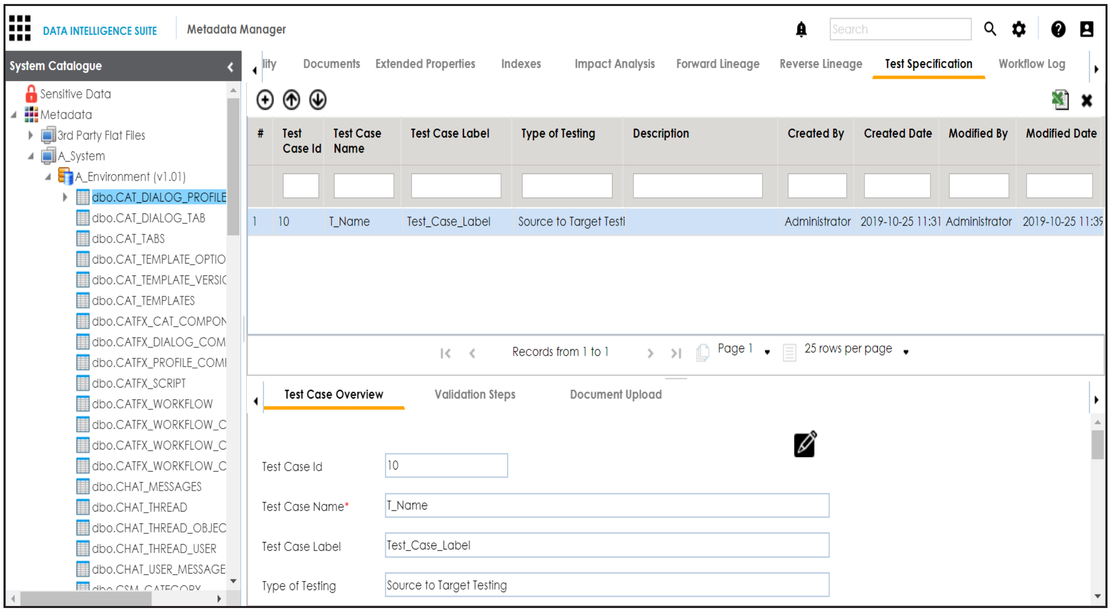
Managing Test Cases

Managing metadata level test cases involves:

- Updating test cases
- Exporting test cases
- Deleting test cases

To update metadata level test cases, follow these steps:

1. Under the **System Catalogue** pane, click the required table.
2. Click the **Test Specification** tab and double-click the required test case.



3. In the **Test Case Overview** tab, click .

   You can update the test case.

To export metadata level test cases, follow these steps:

1. Under the **System Catalogue** pane, click the required table.
2. Click the **Test Specification** tab and click the required test case.
3. Click .

The test case is exported in the .xlsx file.

To delete metadata level test cases, follow these steps:

1. Under the **System Catalogue** pane, click the required table.
2. Click the **Test Specification** tab and click the required test case.
3. Click .

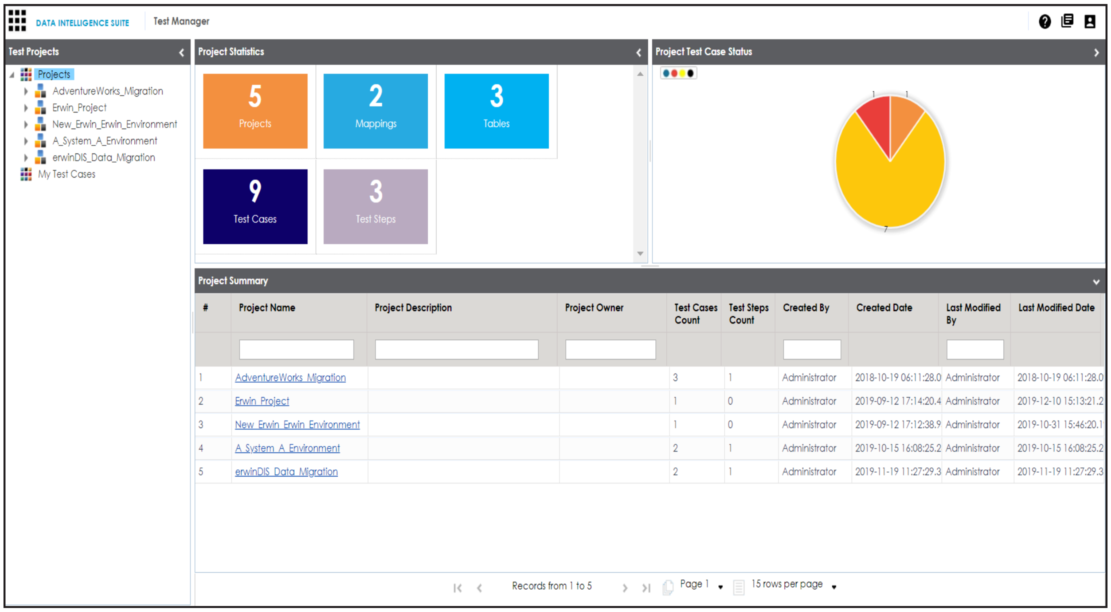
The test case is deleted.

Viewing and Analyzing Test Cases

The Test Manager enables you to view and analyze all the test cases created in the Mapping Manager and Metadata Manager at one place.

To view and analyze test cases in the Test Manager, follow these steps:

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



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

Project Statistics

Projects: It displays the count of projects in the Test Manager
Mappings: It displays the count of mappings with at least one map level test case
Tables: It displays the count 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

The **Project Test Case Status** displays the test case statuses in a pie chart. The test case status can be:

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

The **Project Summary** displays the list of projects.

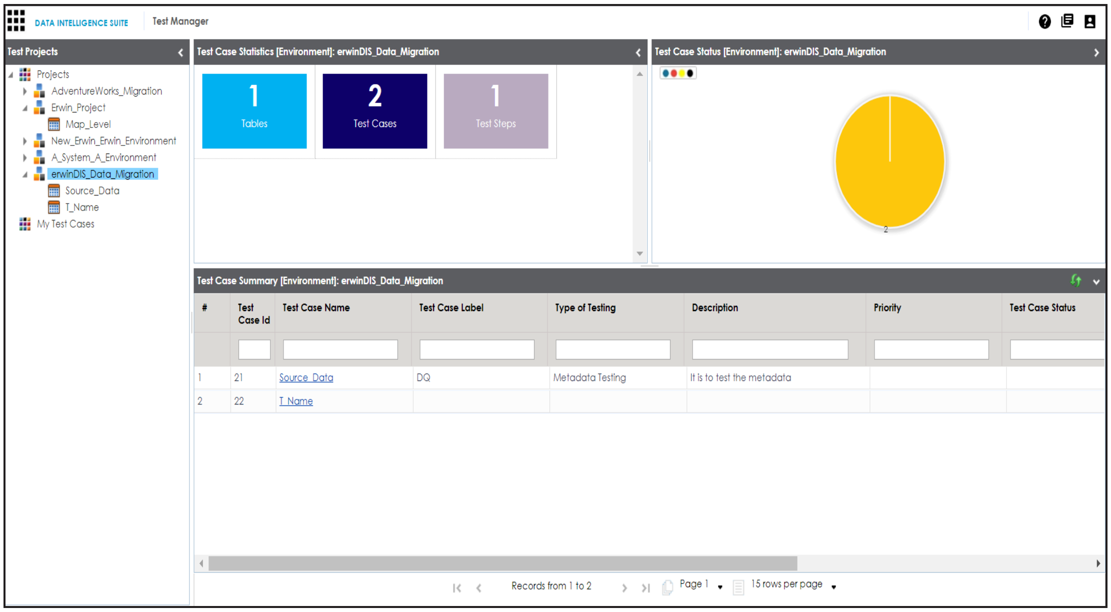
Note: Project names follow a nomenclature:

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 test cases and map level test cases are created in the Mapping Manager.

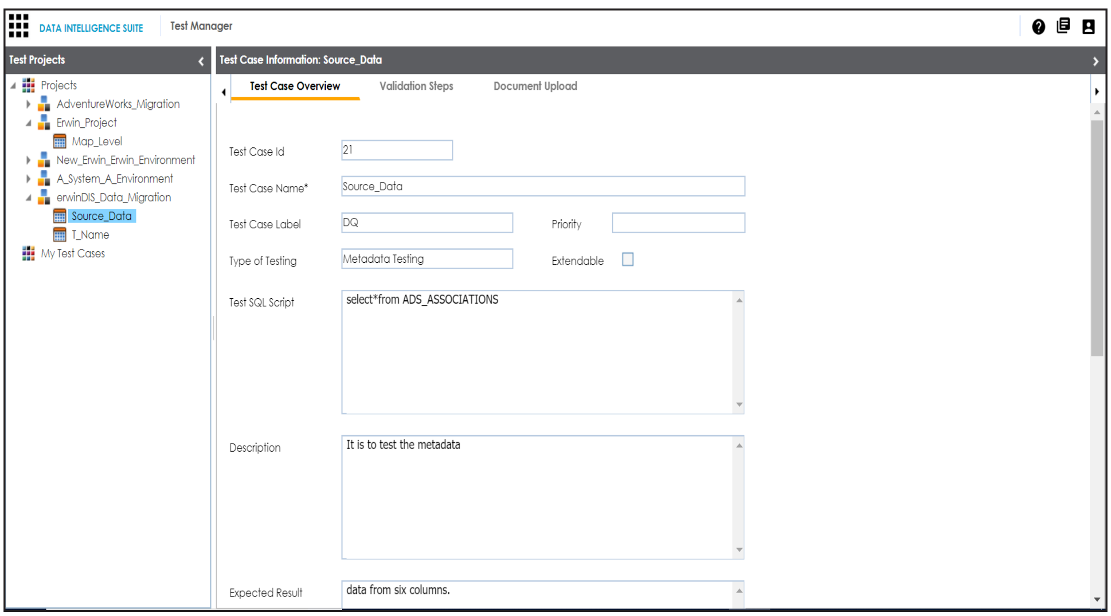
2. Click the desired project.



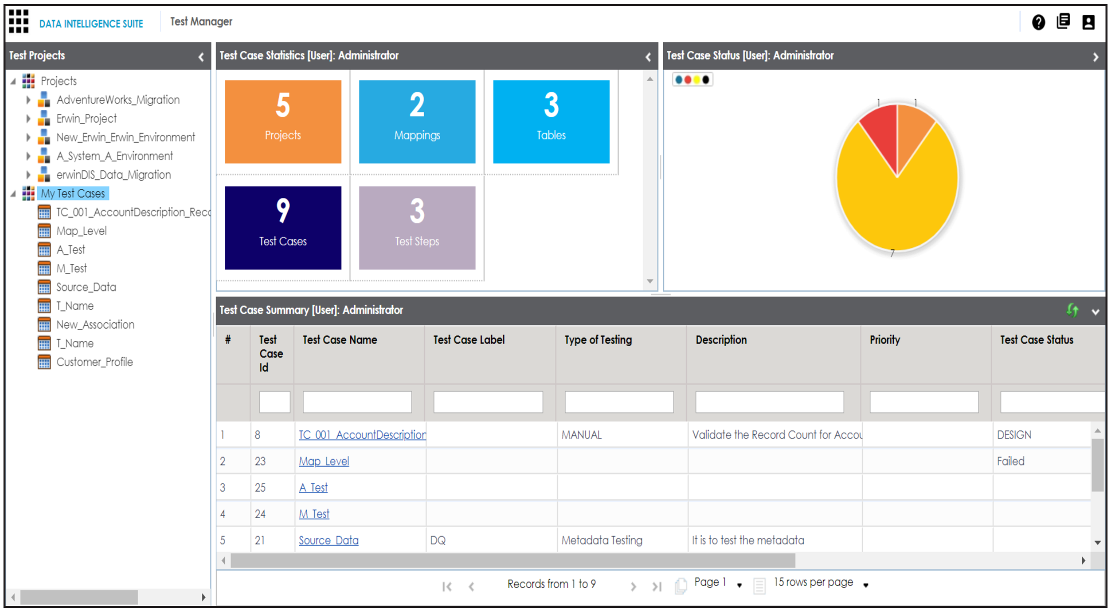
Test Case Statistics, **Test Case Status**, and **Test Case Summary** are displayed on the right pane.

3. Click the test case to view its details.

You can see the Test Case Overview.

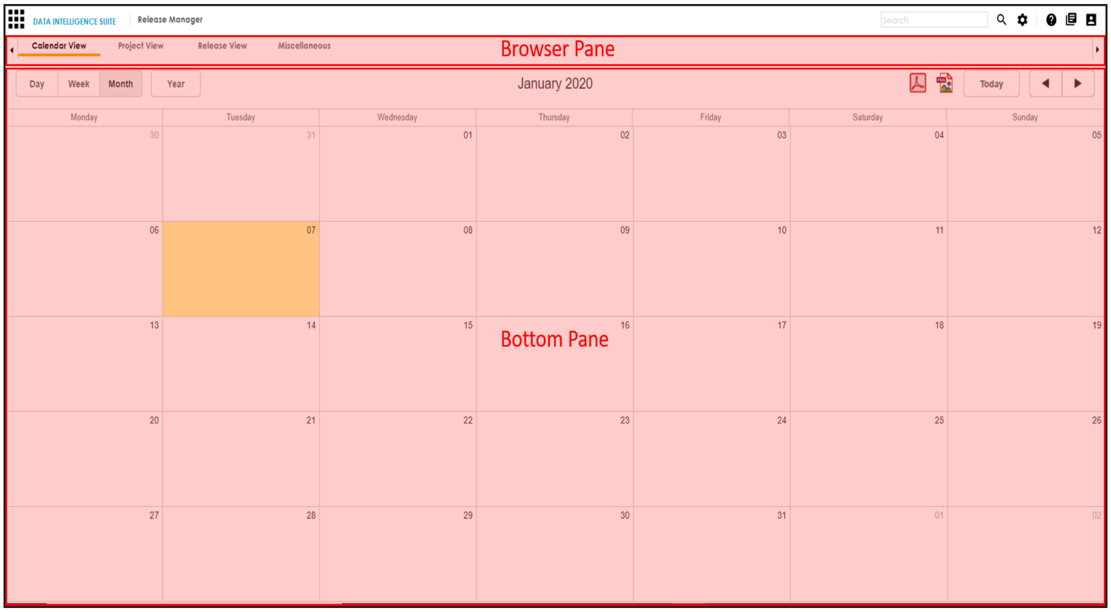


4. Click the **Validation Steps** tab to view the validation steps in the test case.
5. Click the **Documents Upload** tab to view the uploaded documents in the test case.
6. Expand the **My Test Cases** node to browse the test cases created by you (logged in user).



Using Release Manager

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



UI Section	Function
Browser Pane	Use this pane to browse through different views and a Miscellaneous tab. There are three different views: ▪ 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.
Bottom Pane	Use this pane to view or work on the data displayed based on your selection in the browser pane.

Managing releases involve the following:

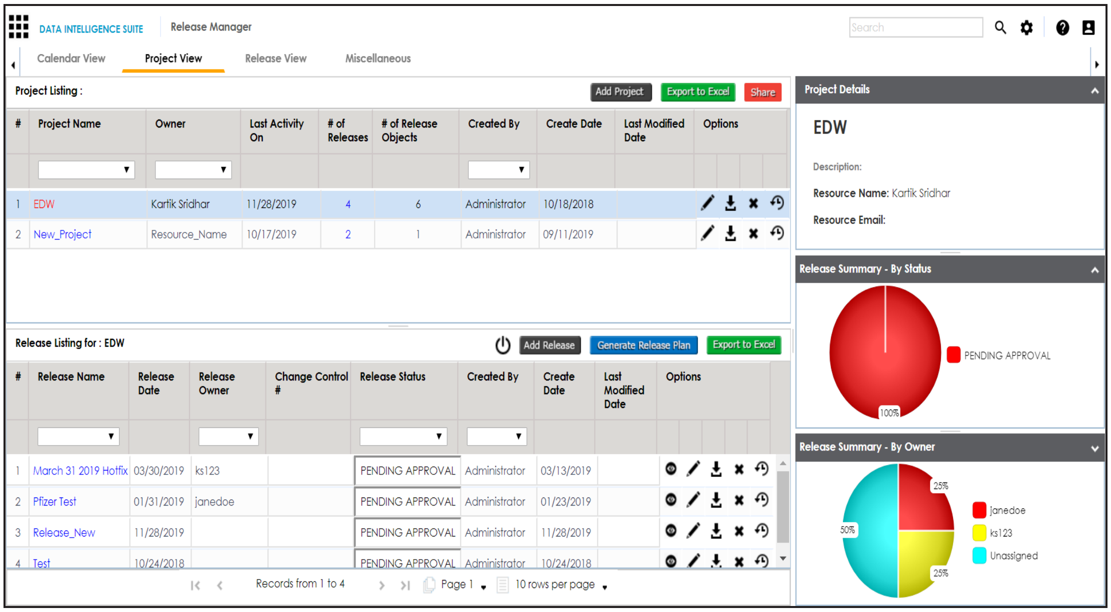
- Creating projects and adding releases
- Adding release objects to releases
- Moving release objects
- Sorting projects and releases

Creating Projects and Adding Releases

You can create a project and add multiple releases to the project.

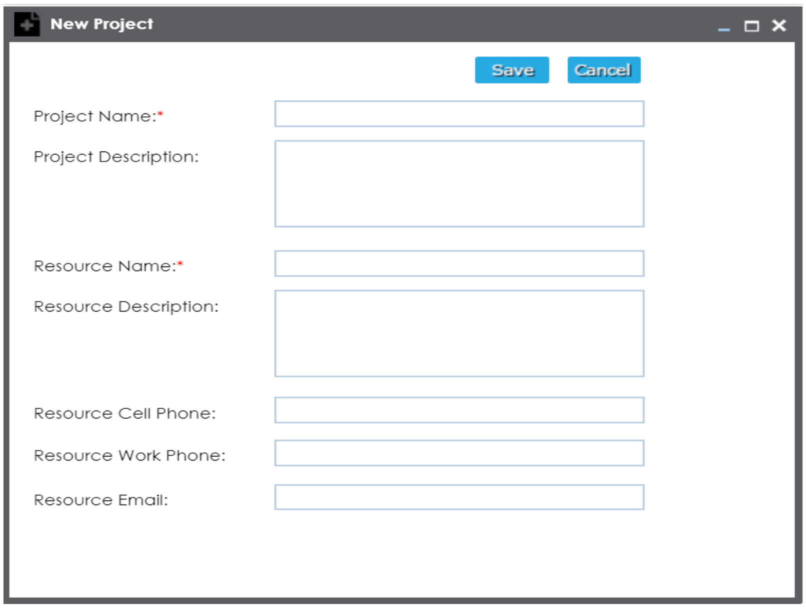
To create projects, follow these steps:

1. Go to **Application Menu** > **Data Catalog** > **Release Manager**.
2. Click the **Project View** tab.



3. Click **Add Project**.

   The New Project page appears.



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

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

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

5. Click **Save**.

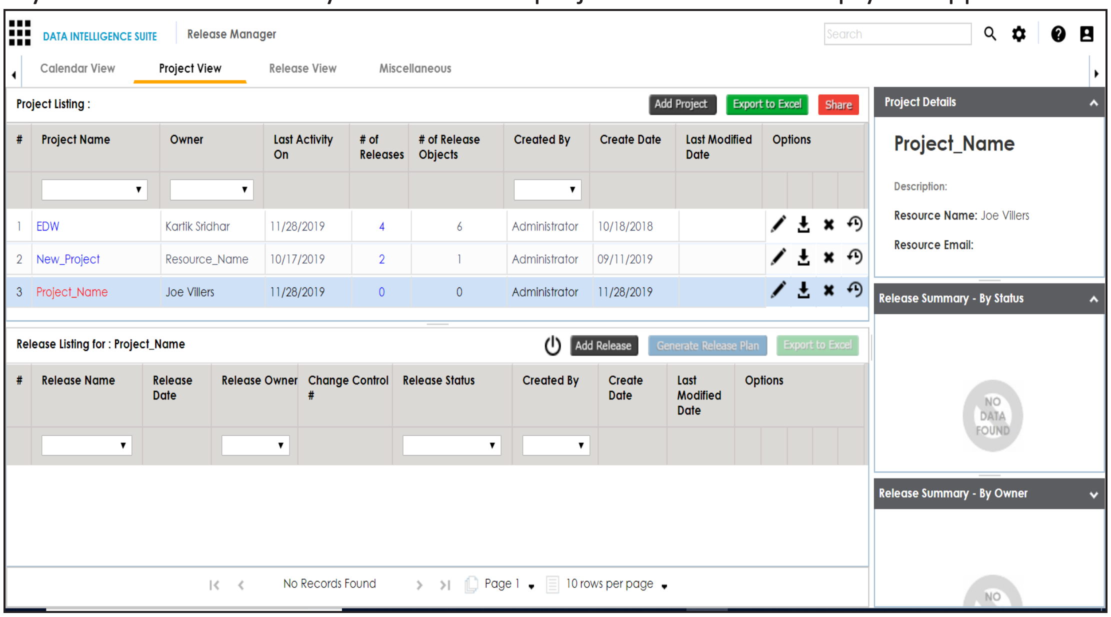
   The project is created and saved in the Project Listing.

To add releases to the project, follow these steps:

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

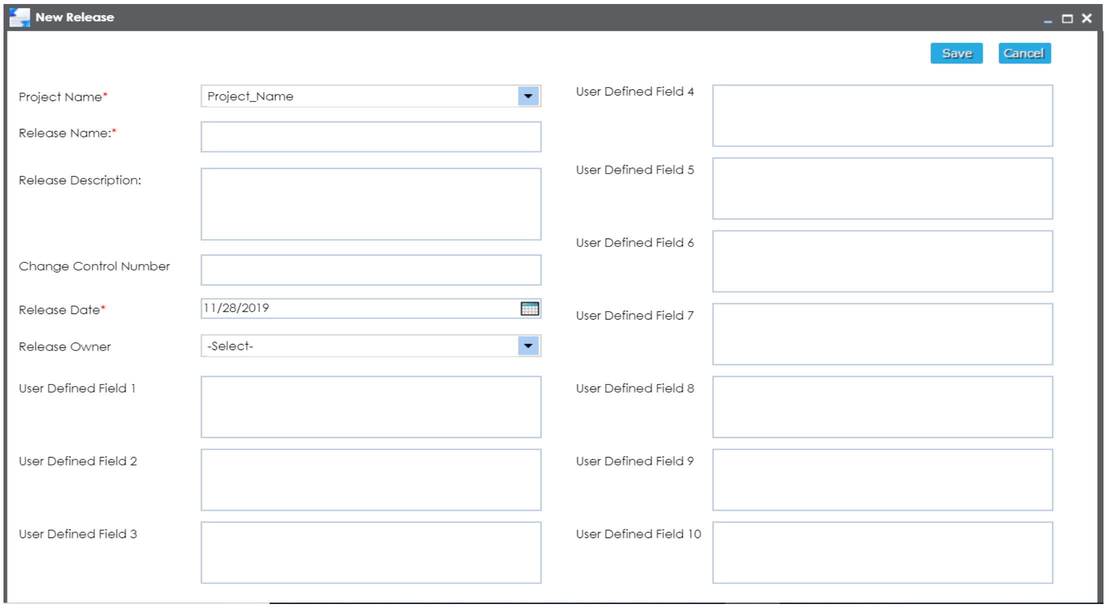
   The Release Listing for the project appears.

   If you have not added any release to the project earlier then empty list appears.

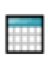


2. Click **Add Release**.

   The New Release page appears.



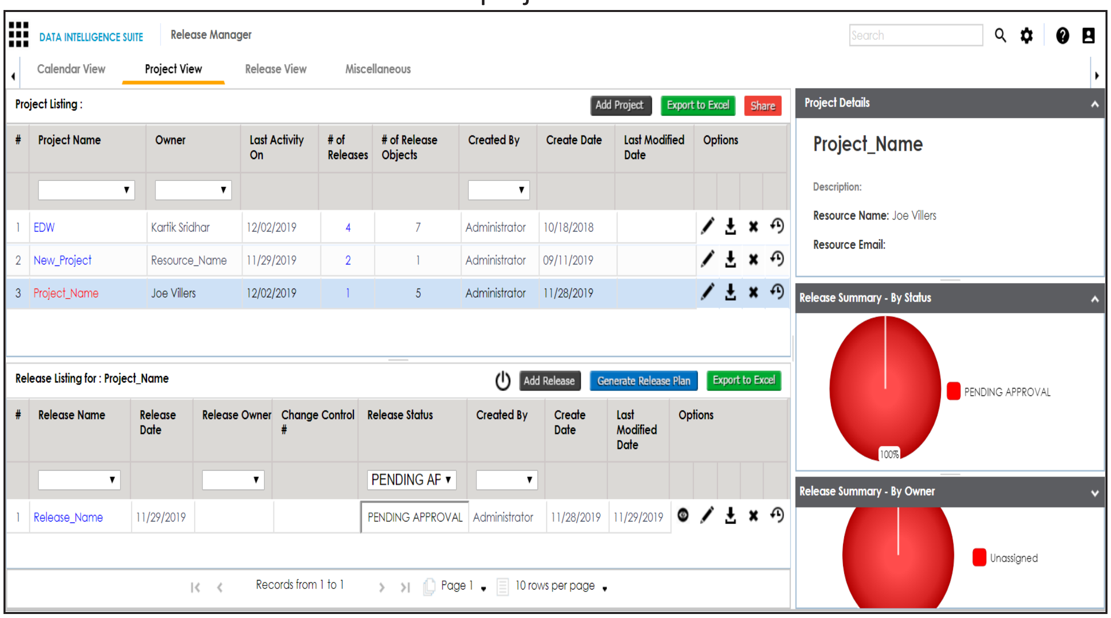
3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Project Name	Specifies the project name under which the release is being created. For example, EDW.
Release Name	Specifies the unique name of the release. For example, Pfizer Test.
Release Description	Specifies the description about the release. For example: The release contains two release objects of the data item type.
Change Control Number	Specifies the change control number of the release. For example, v1.8.
Release Date	Specifies the date of the release. For example, 01/22/2020. Use  to enter the release date.

Field Name	Description
Release Owner	Specifies the release owner's User ID. 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.
User Defined Fields (1-10)	You can use these additional fields with your own UI labels. You can define the UI labels in the Language Settings.

4. Click **Save**.

The release is added to the selected project.



5. Use the following options:

View ( )

To view the release details, click .

Edit ( )

To edit, the release, click ✎.

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

Download (⤓)

To download the release details, click ⤓.

Delete (✖)

To delete the release, click ✖.

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

Adding Release Objects to Releases

You can add following release objects to releases:

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

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

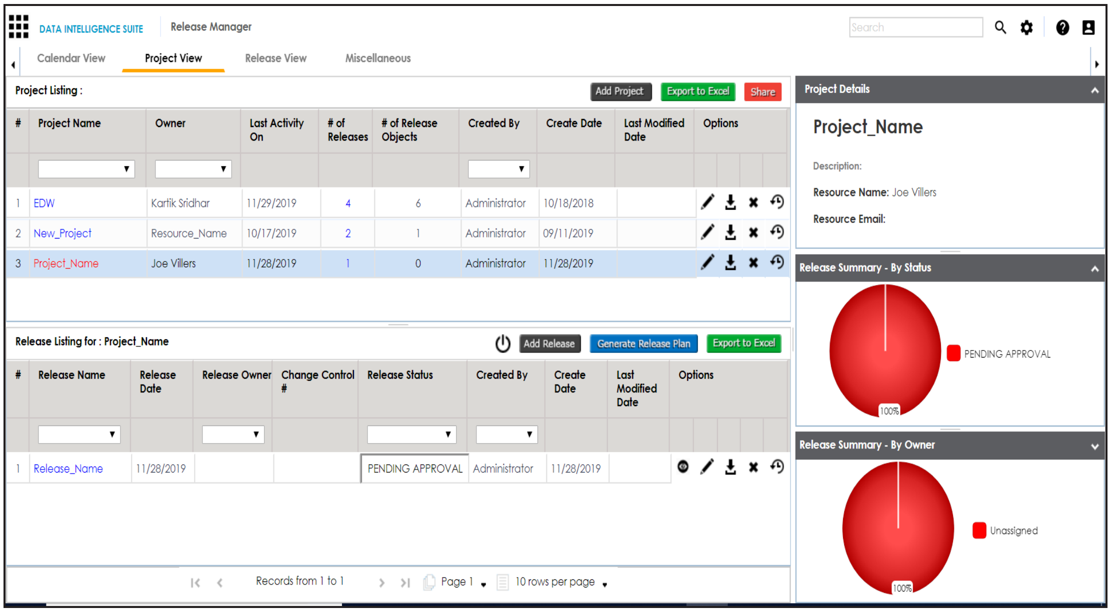
Adding Data Item Mappings as Release Objects

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

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

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

   The release listing of the project appears.

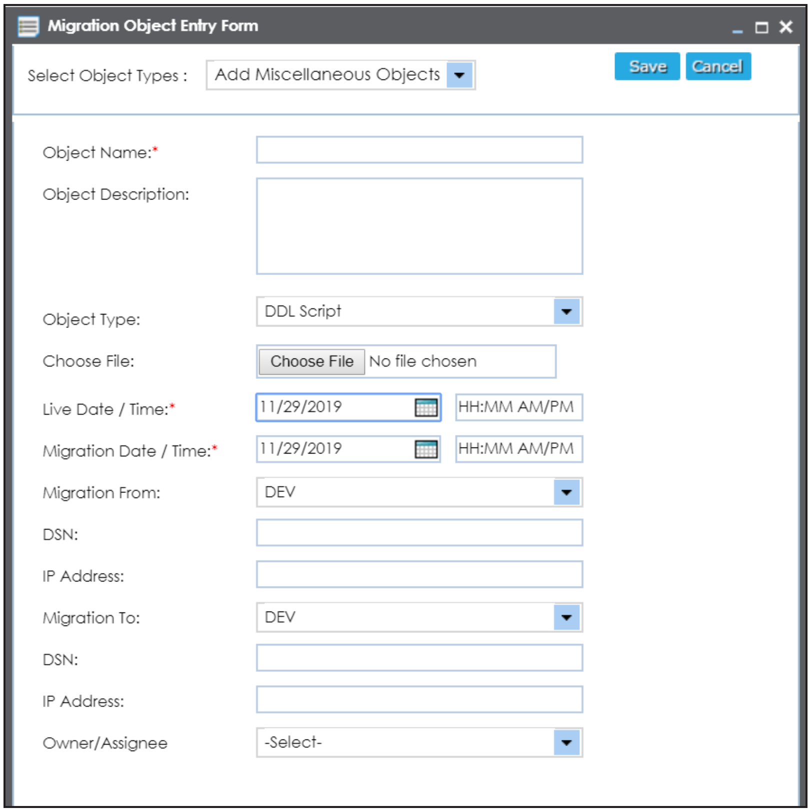


2. Click the required <Release_Name>.

   The Release View page appears showing the release object details.

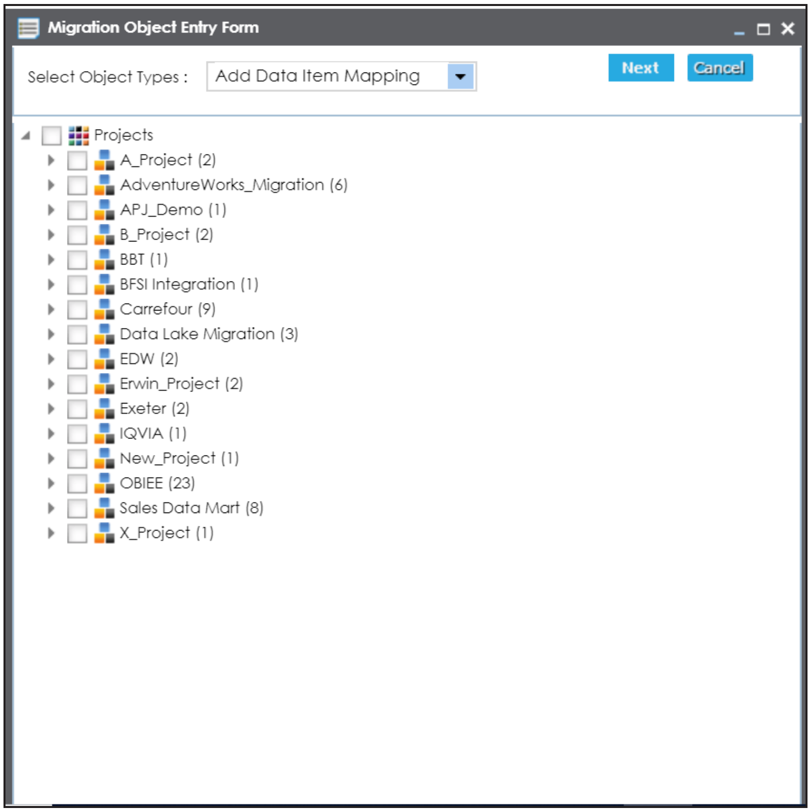
3. Click **Add Object**.

   The Migration Object Entry Form page appears.



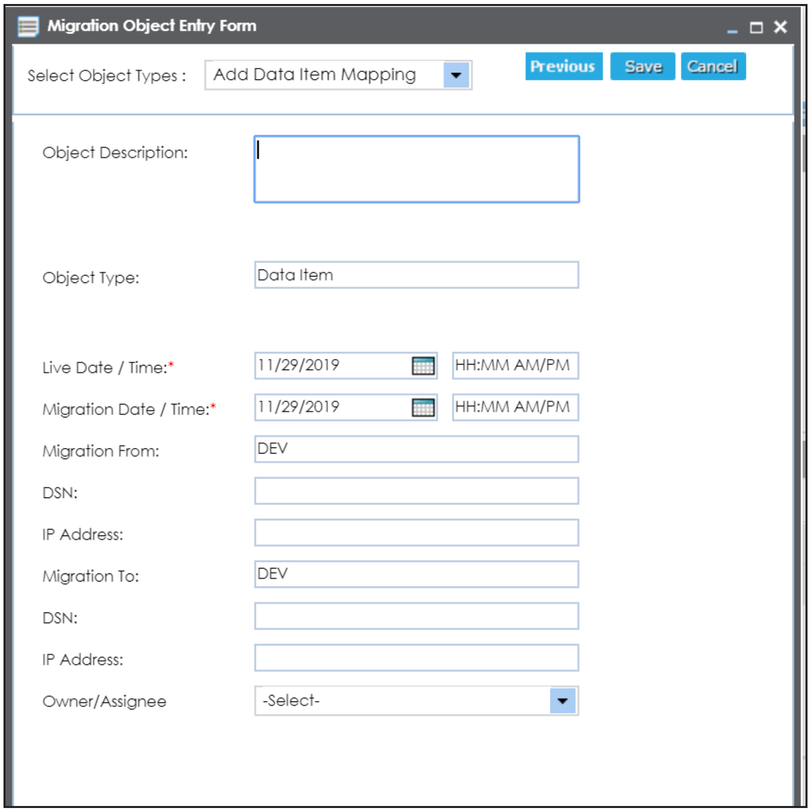
4. In **Select Object Types**, select **Add Data Item Mapping**.

   The following page appears.



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

   The Migration Object Entry Form page reappears.



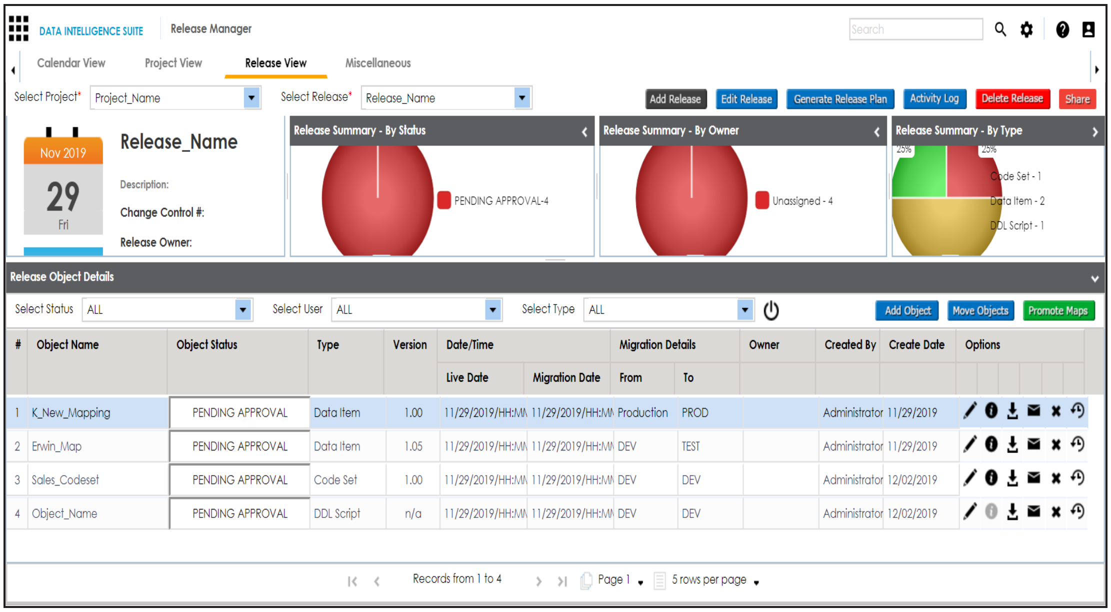
6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Object Description	Specifies the description about the release object being added to the release. For example: The release object is a data item mapping under the Datawarehouse project.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.
Migration	Specifies the migration date and time of the release object from the DEV

Field Name	Description
Date / Time	release environment. For example, 04/30/2020 9:30 PM. Use to enter the migration date. Enter the migration time in the HH : MM format. The Migration Date cannot exceed the Live Date.
Migration From	Specifies the current release environment of the release object. This field is set to DEV by default.
DSN	Specifies the DSN name from where the release object is being migrated. For example, ErwinDIS931.
IP Address	Specifies the IP Address from where the release object is being migrated. For example, 10.32.445.21
Migration To	This field is set to DEV by default. You can use the Promote Map option to migrate the selected data item mappings to the required release environment for the first time.
DSN	Specifies the DSN name to which the release object is being migrated. For example, ErwinDIS932.
IP Address	Specifies the IP address to which the release object is being migrated. For example, 10.31.447.22
Owner / Assignee	Specifies the User ID of the release object's owner. For example, jdoe. The option list appears based on the users created in the Resource Manager. For more information on creating users, refer to the Creating Users and Assigning Roles topic.

7. Click **Save**.

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



8. Use the following options:

Edit ( )

To edit the release object, click .

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

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

Information ( )

To view the mapping information, click .

Download ( )

To download the release object details, click .

Email ( )

To send email notification about the release object click .

Delete ( )

To delete the release object, click .

Promoting Data Item Mappings

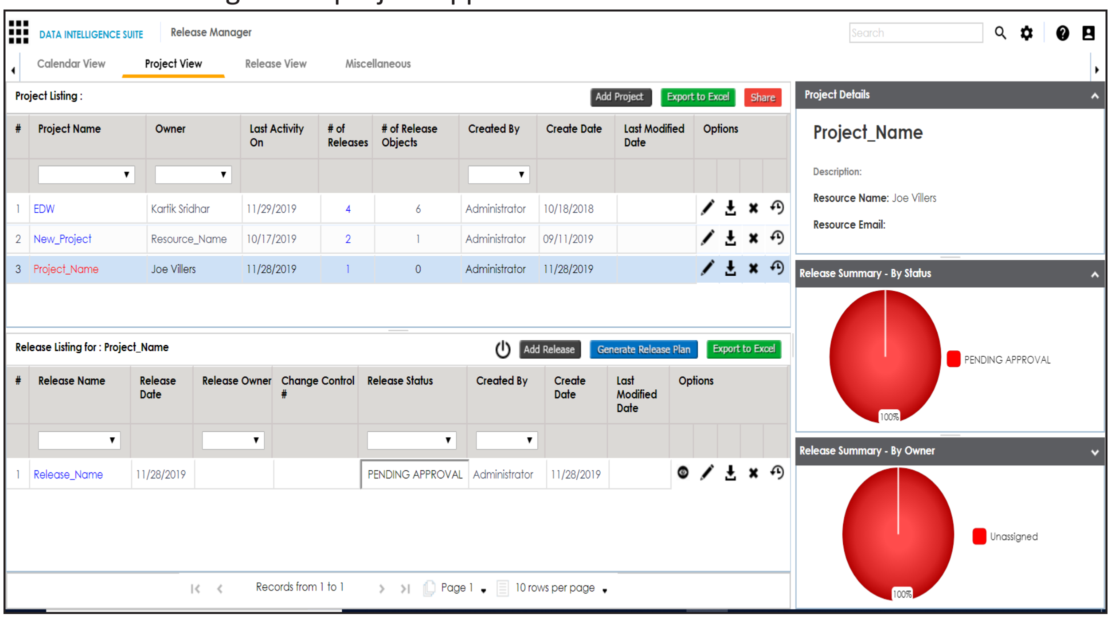
You can promote data item mappings to different release environments in the Release Manager.

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

To promote data item mappings, follow these steps:

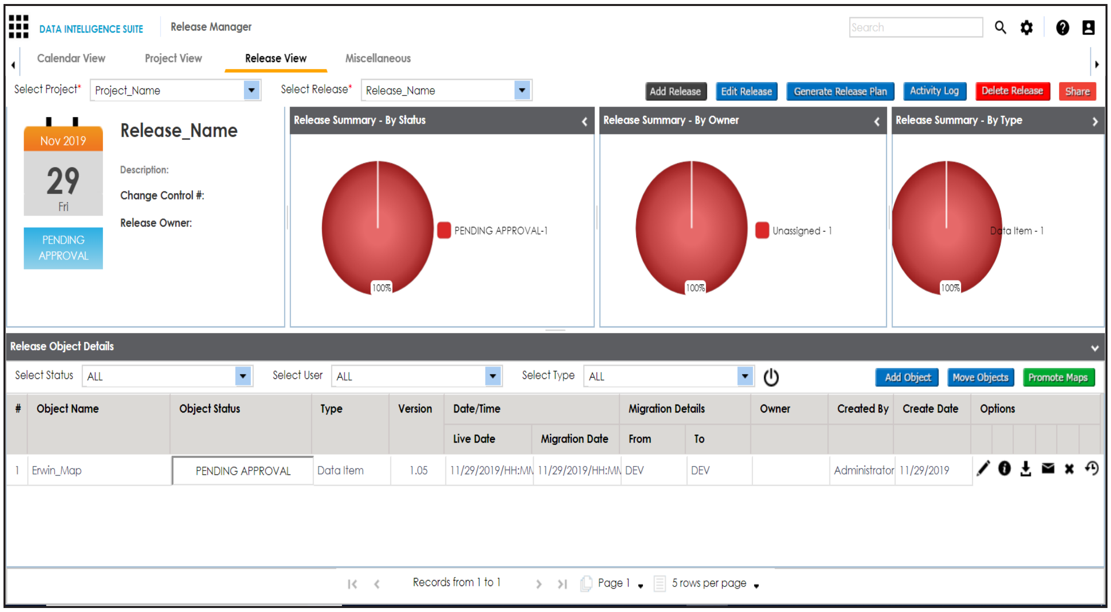
1. Under the **Project View** tab, click the required project.

   The release listing of the project appears.

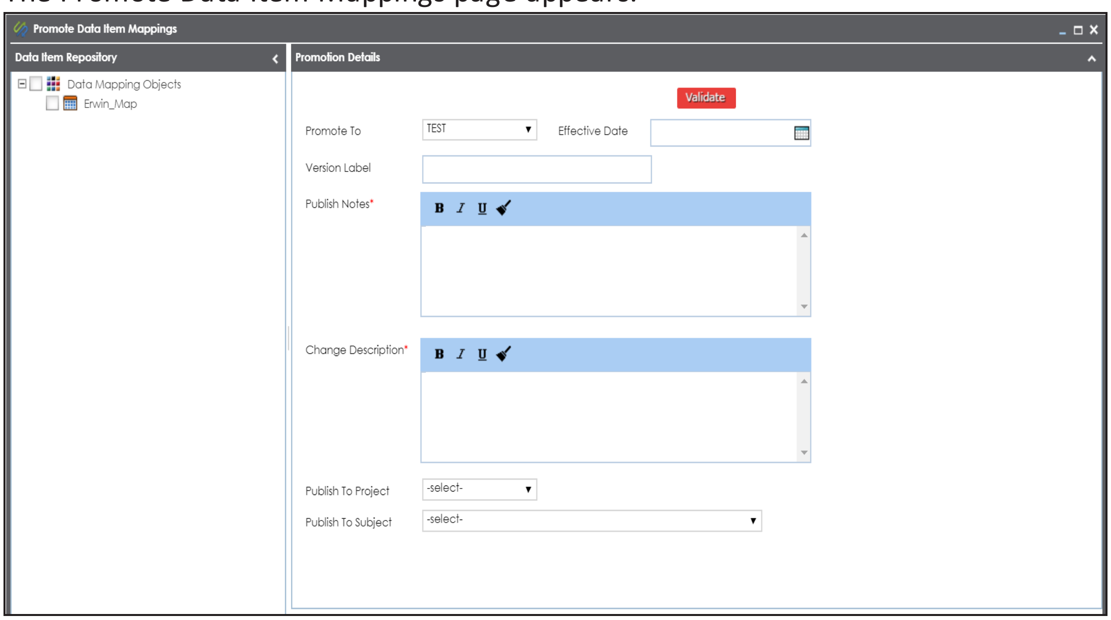
2. Click the required <Release_Name>.

   The Release View tab appears.



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

   The Promote Data Item Mappings page appears.



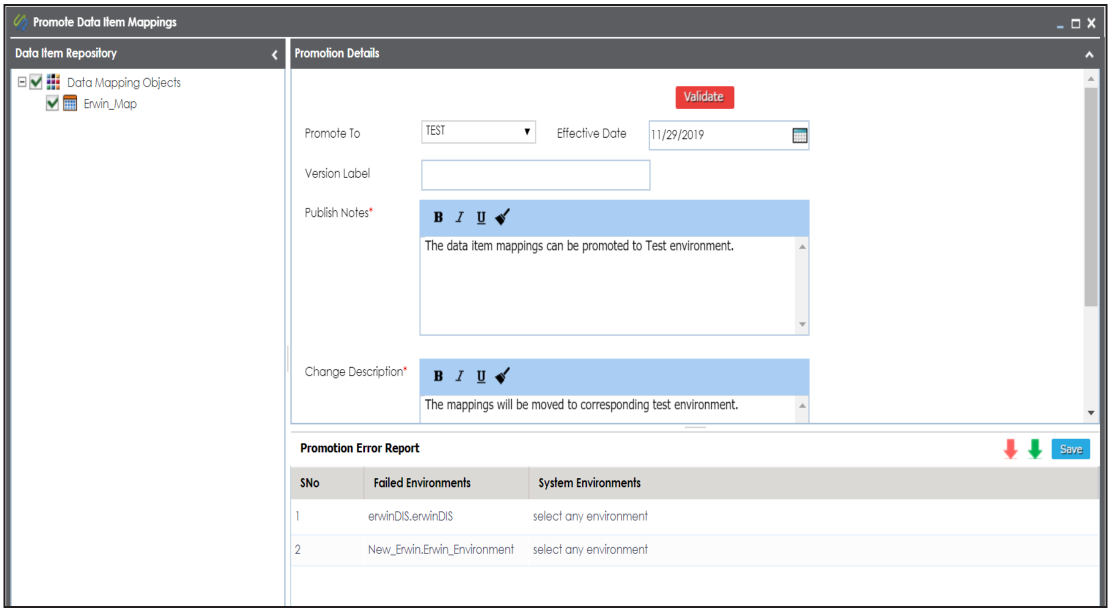
4. In **Data Item Repository**, select the required **<Map_Name>** check box.

5. In **Promotion Details**, enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

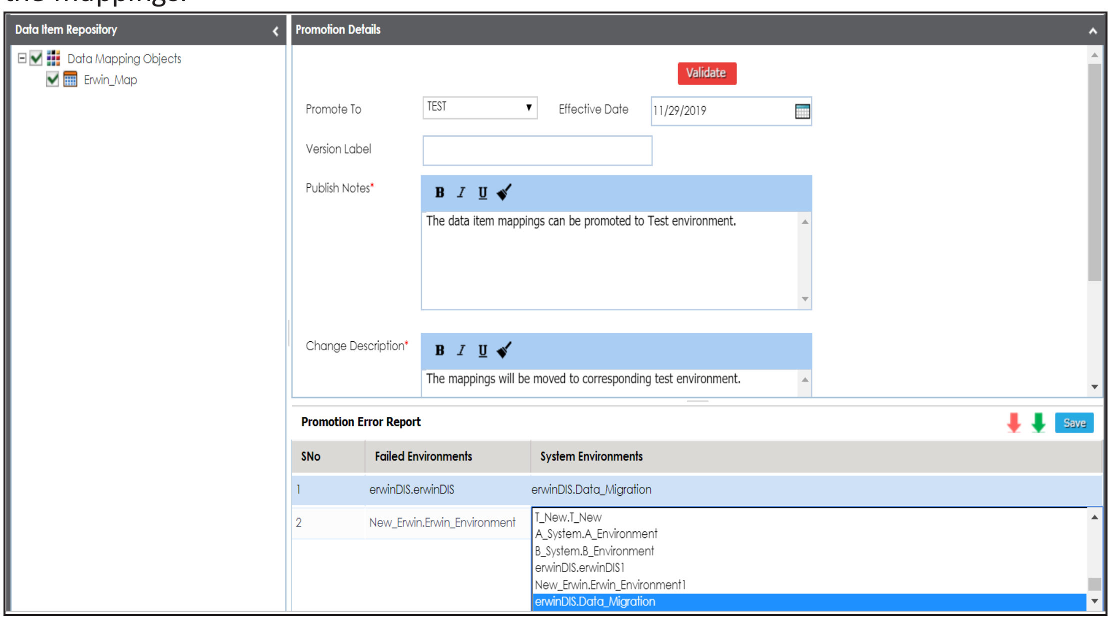
Field Name	Description
Promote To	Specifies the release environment to which the release object is being promoted. For example, TEST. Select the release environment where you wish to promote the release object (data item mapping).
Effective Date	Specifies the effective migration date of the release object.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

6. Click **Validate**.

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

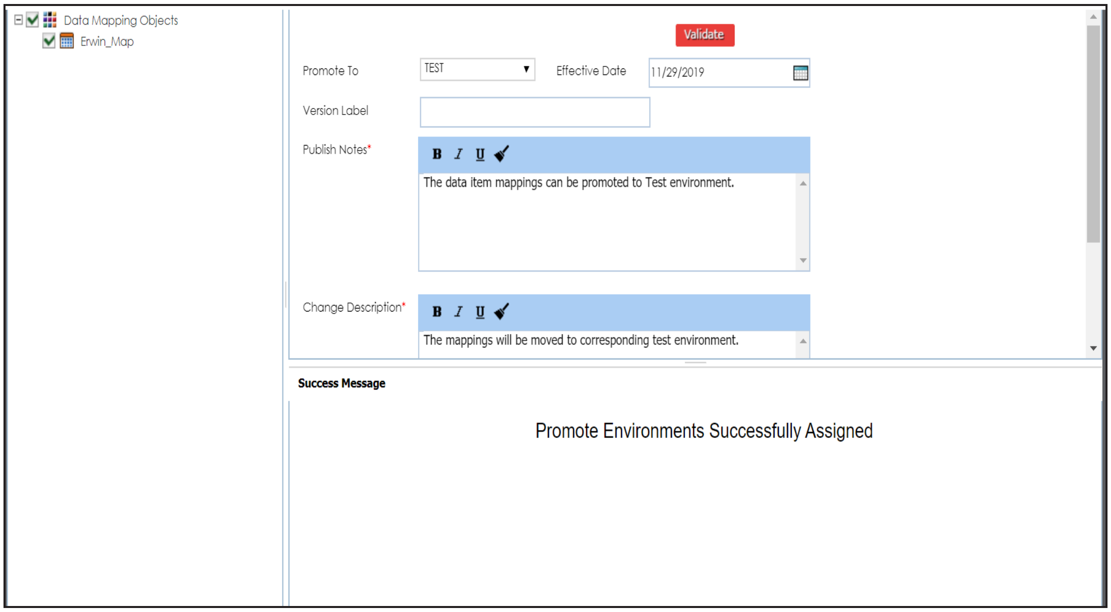


7. Double-click the corresponding cells to select the promote system environment for the mappings.



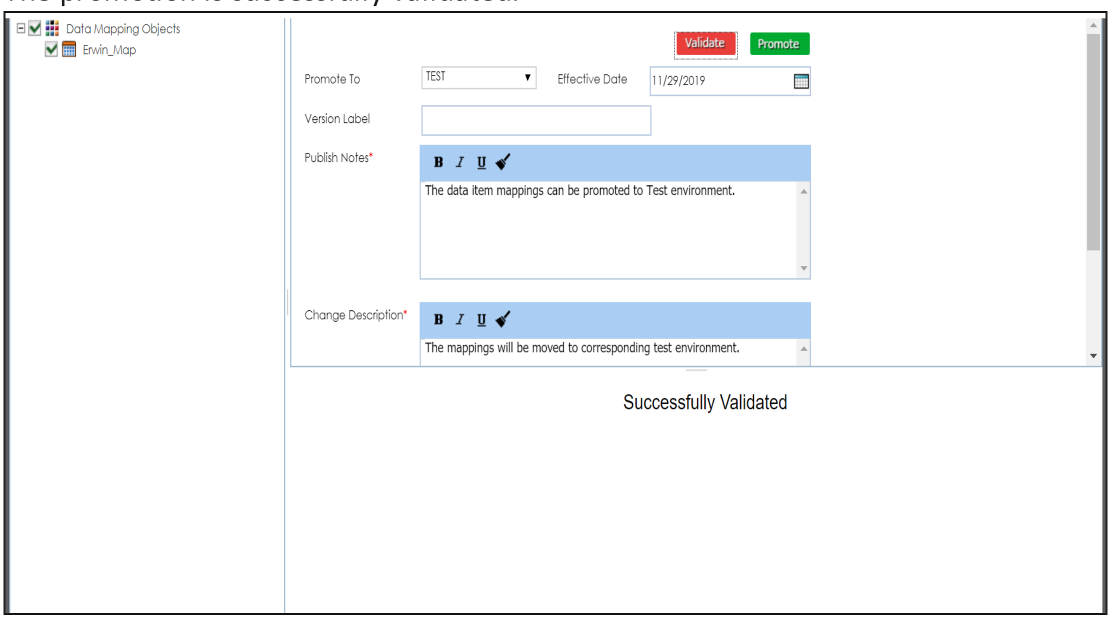
8. Click **Save**.

The promote system environments are assigned.



9. Click **Validate**.

   The promotion is successfully validated.



10. Click **Promote**.

    The object is promoted to the selected project.

Note: 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.

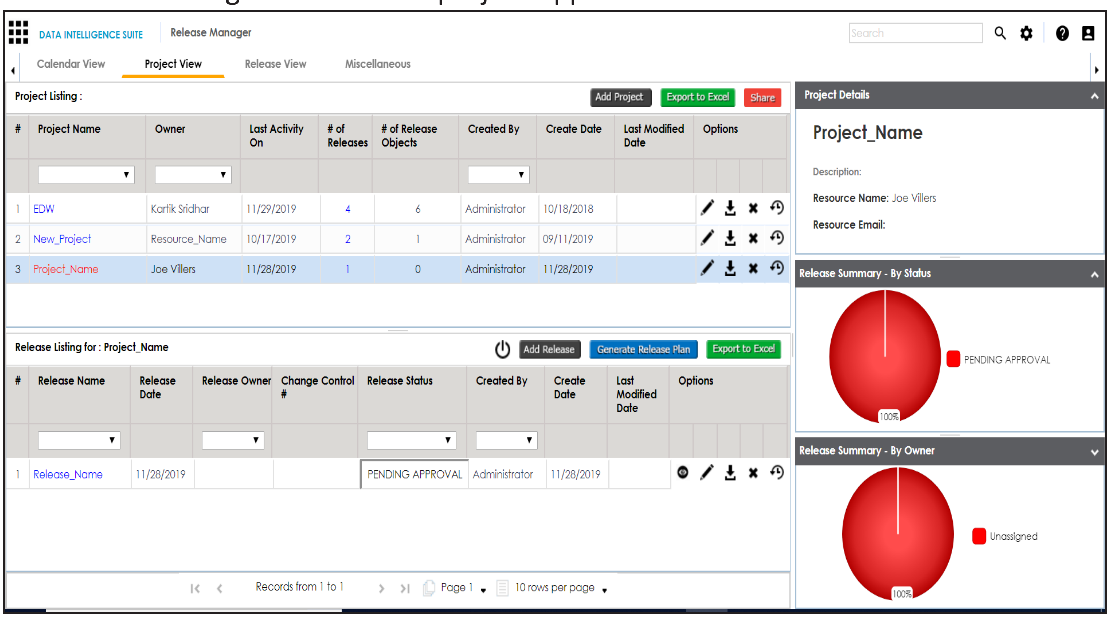
Adding Codeset as Release Objects

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 desired project.

   The release listing of the desired project appears.

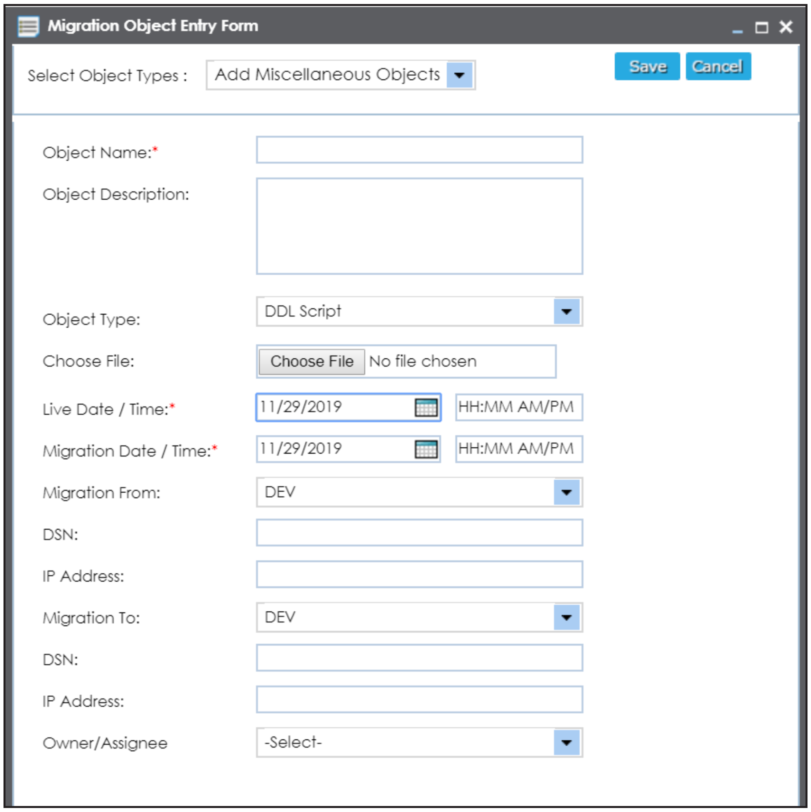
   

2. Click the required <Release_Name>.

   The Release View page appears.

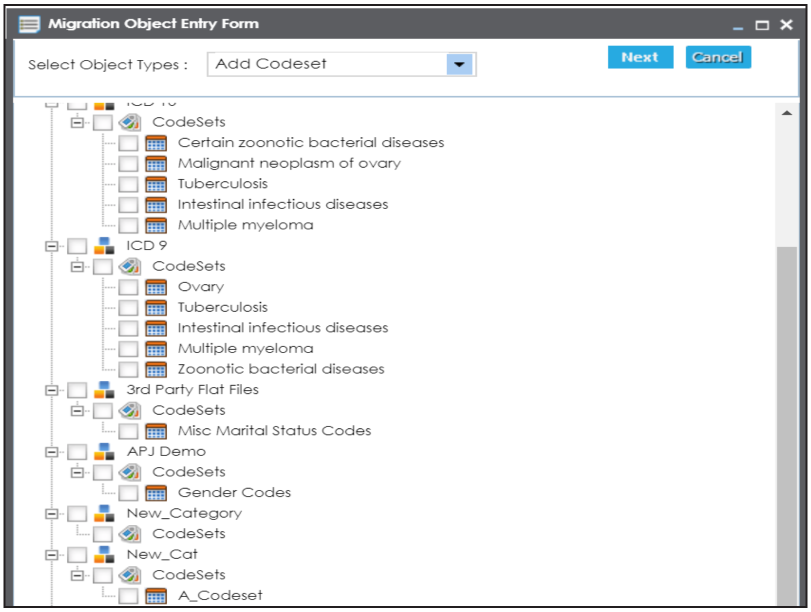
3. Click **Add Object**.

   The Migration Object Entry Form page appears.



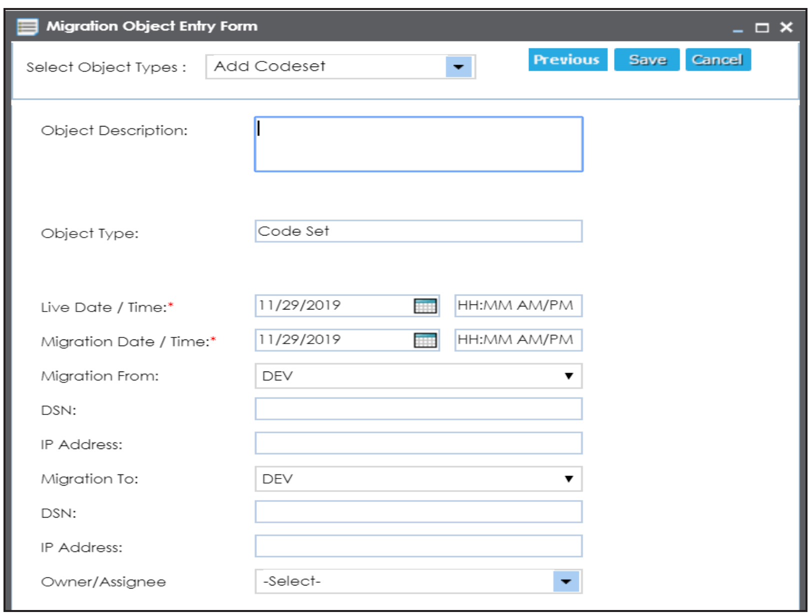
4. In **Select Object Types**, select **Add Codeset**.

   The following page appears.



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

   The Migration Object Entry Form page reappears.



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

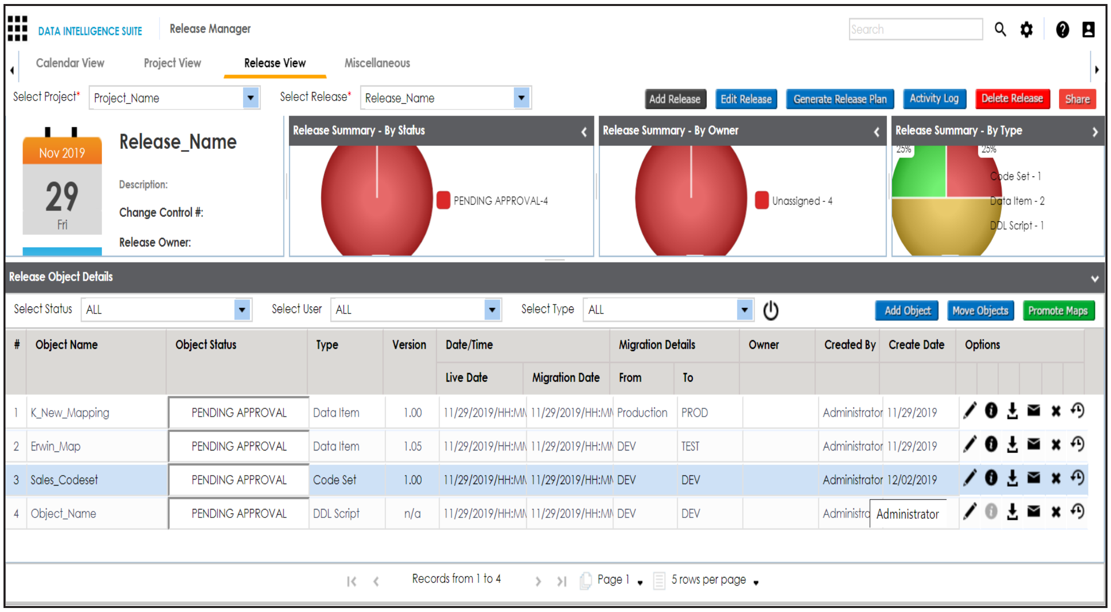
Field Name	Description
Object Description	Specifies the description about the release object being added to the release. For example: The release object is a codeset under the 3rd Party Flat Files category.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020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

Field Name	Description
	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.

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



8. Use the following options:

   Edit (✎)

   To edit, the release object, click ✎.

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

   Information (ⓘ)

To view the mapping information, click .

Download ()

To download the release object details, click .

Email ()

To send email notification about the release object click .

Delete ()

To delete the release object, click .

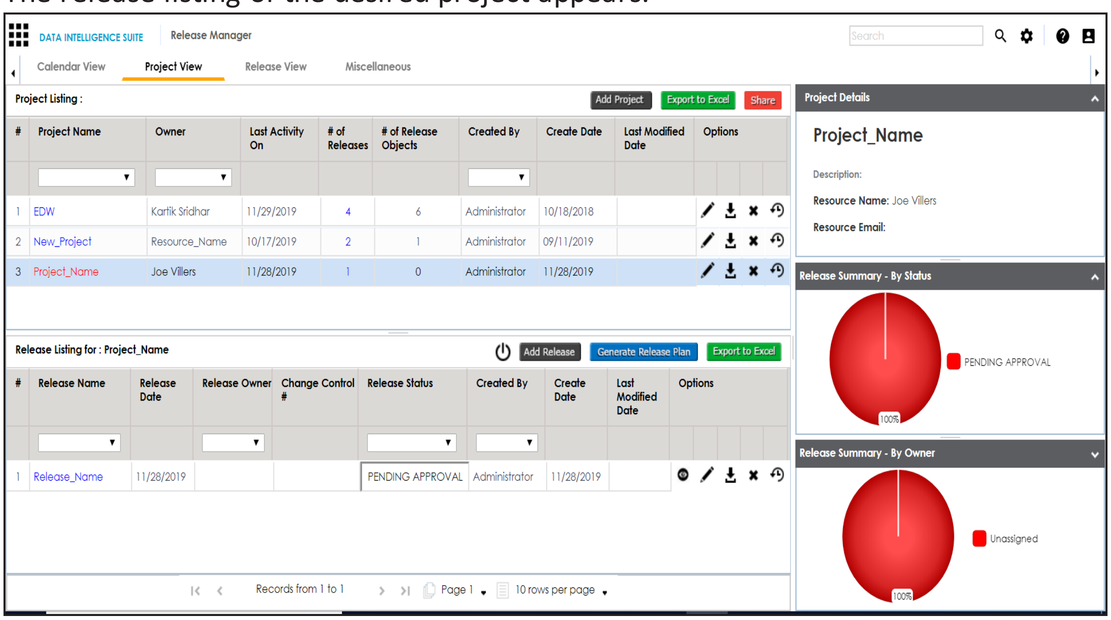
Adding Code Mappings as Release Objects

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

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

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

   The release listing of the desired project appears.

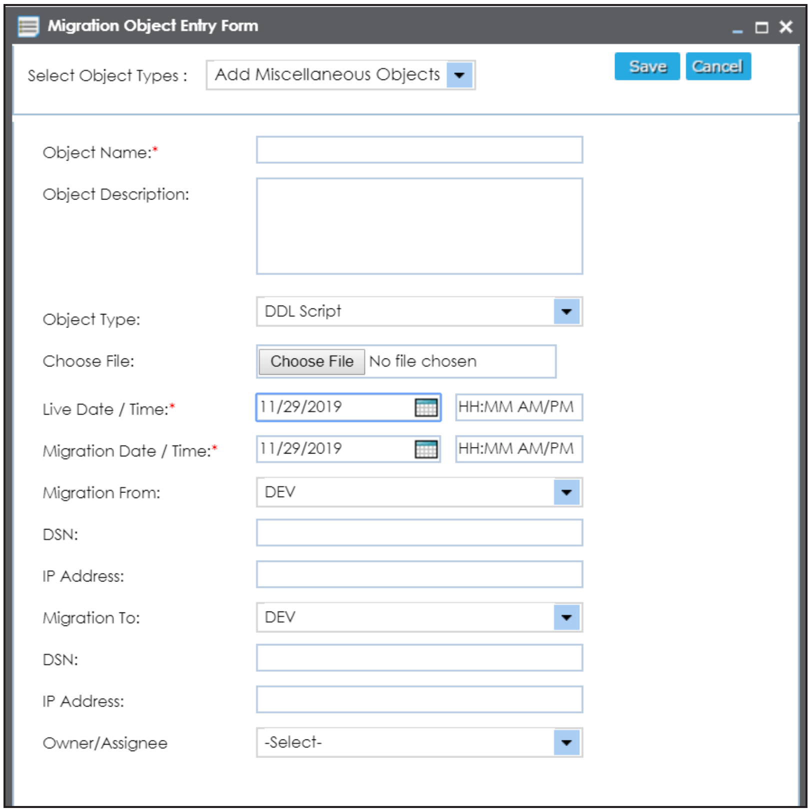


2. Click the required <Release_Name>.

The Release View page appears showing the release object details.

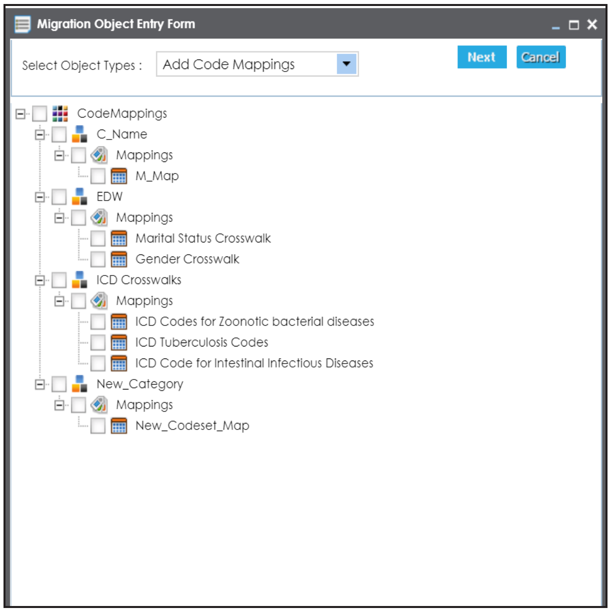
3. Click **Add Object**.

   The Migration Object Entry Form page appears.



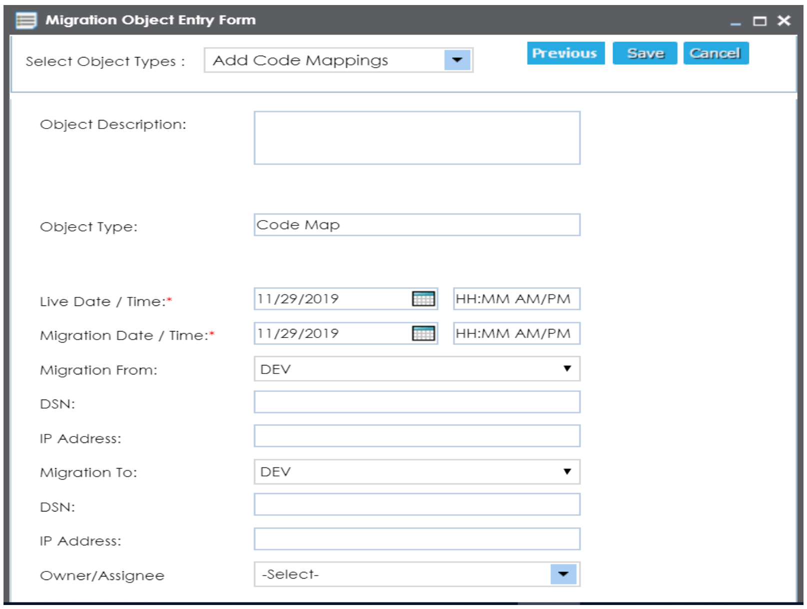
4. In **Select Object Types**, select **Add Code Mappings**.

   The following page appears.



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

   The Migration Object Entry Form page reappears.



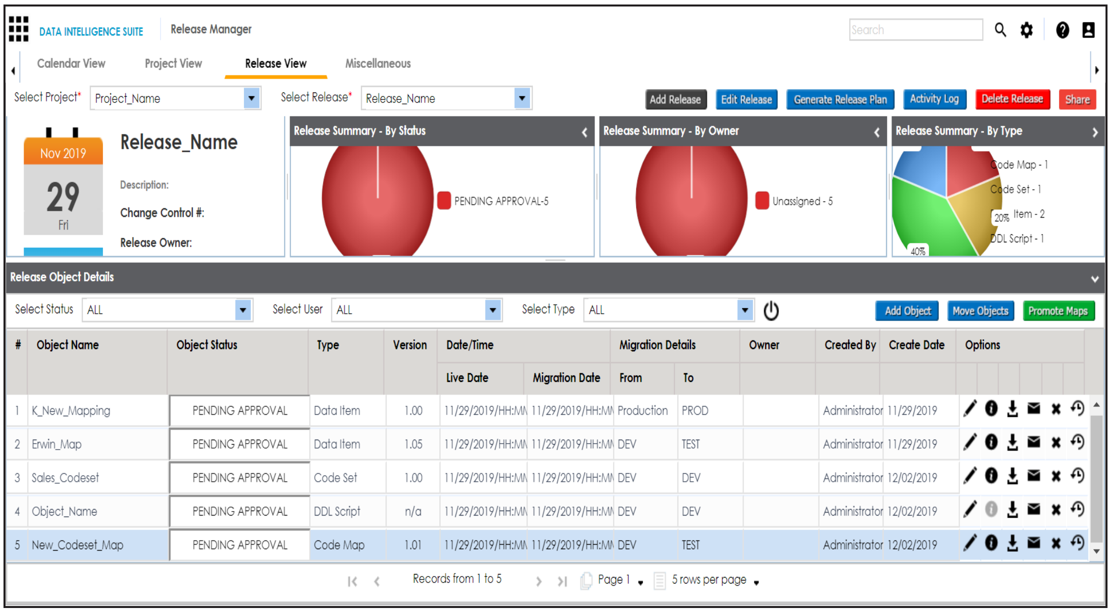
6. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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

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

7. Click **Save**.

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



8. Use the following options:

   Edit ()

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

   Information ()

   To view the mapping information, click .

   Download ()

To download the release object details, click .

Email ()

To send email notification about the release object click .

Delete (✖)

To delete the release object, click ✖.

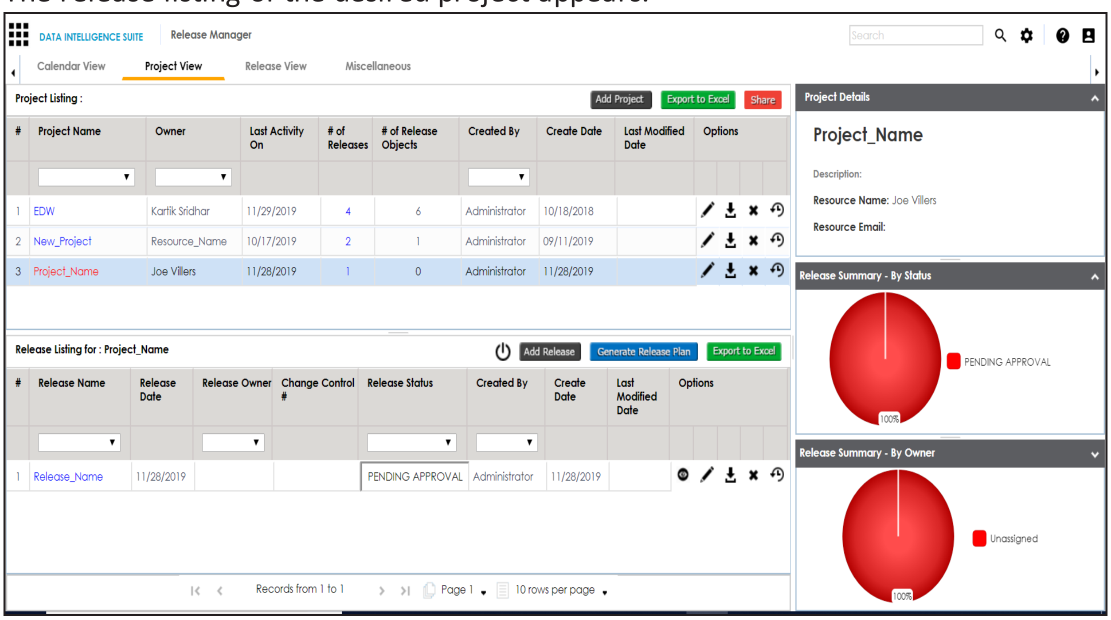
Adding Miscellaneous Objects

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 desired project appears.

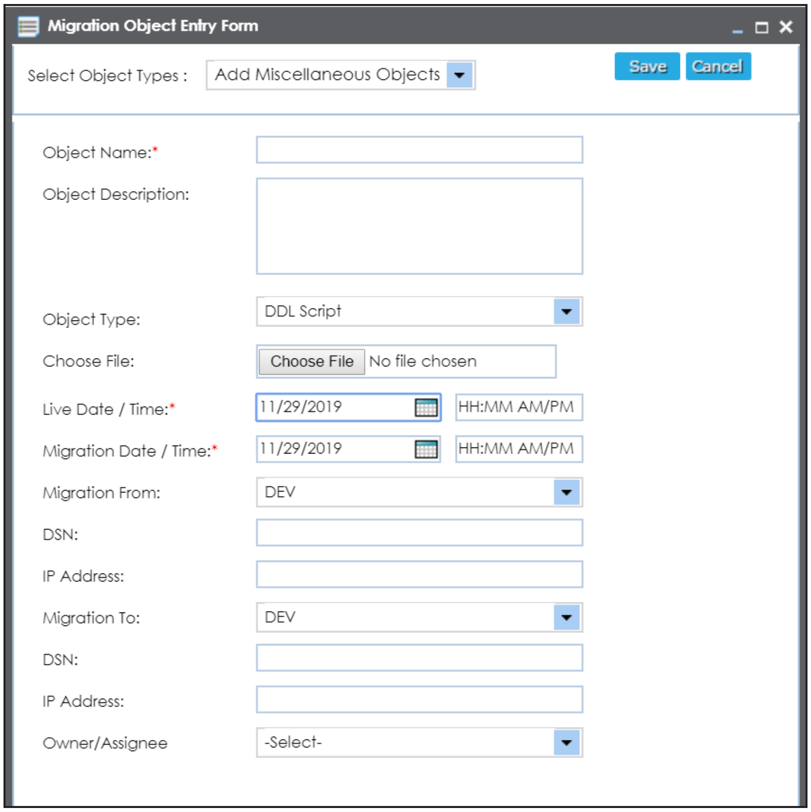
   

2. Click the required <Release Name>.

   The Release View page appears.

3. Click **Add Object**.

   The Migration Object Entry Form page appears.



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

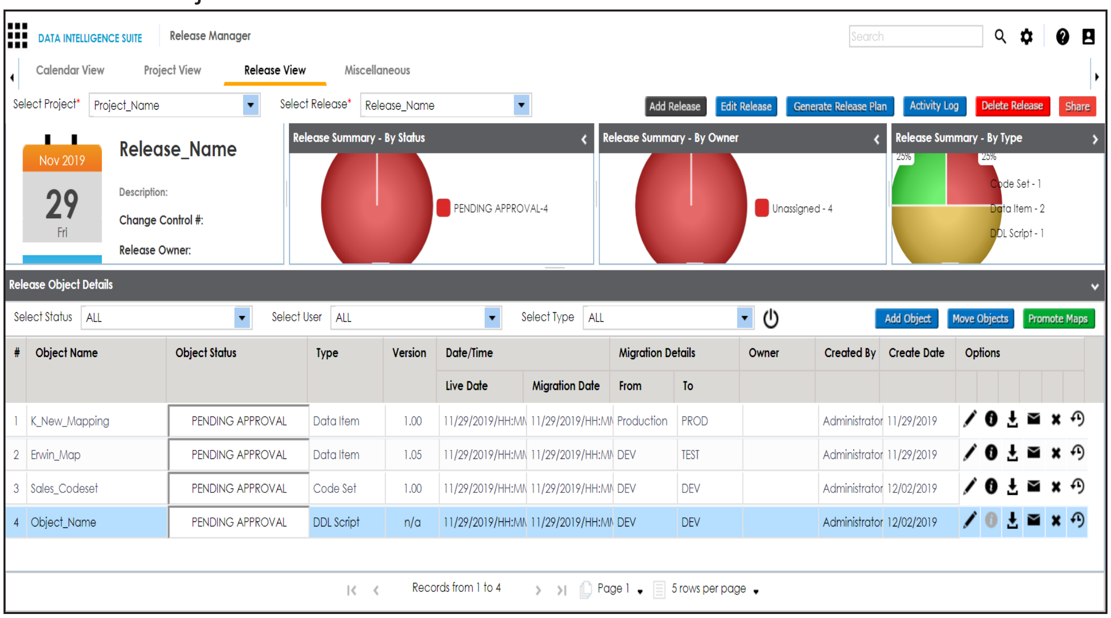
Field Name	Description
Object Name	Specifies the name of the release object being added to the release. For example, AdventureWorks_DDL.
Object Description	Specifies the description about the release object. For example: The release object is the DDL script of the AdventureWorks environment.
Object	Specifies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

Field Name	Description
Type	For example, DDL Script. You can add object type in the Release Manager Settings.
Choose File	Specifies the physical file being attached to the release object. Click **Browse** to select the file.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.
Migration Date / Time	Specifies the migration date and time of the release object from a release environment. For example, 04/30/2020 9:30 PM. Use to enter the migration date. Enter the migration time in the HH : MM format. The Migration Date cannot exceed the Live Date.
Migration From	Specifies the current release environment of the release object. For example, DEV. You can create release environments in the Release Manager Settings.
DSN	Specifies the DSN name from where the release object is being migrated. For example, ErwinDIS931.
IP Address	Specifies the IP Address from where the release object is being migrated. For example, 10.32.445.21
Migration To	Specifies the release environment to which the release object is being migrated. For example, TEST. You can create release environments in the Release Manager Settings.
DSN	Specifies the DSN name to which the release object is being migrated. For example, ErwinDIS932.
IP Address	Specifies the IP address to which the release object is being migrated.

Field Name	Description
	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.



7. Use the following options:

   Edit ( )

   To edit, the release object, click .

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

   Information ( )

   To view the mapping information, click .

Download (⤓)

To download the release object details, click ⤓.

Email (✉)

To send email notification about the release object click ✉.

Delete (✖)

To delete the release object, click ✖.

Moving Release Objects

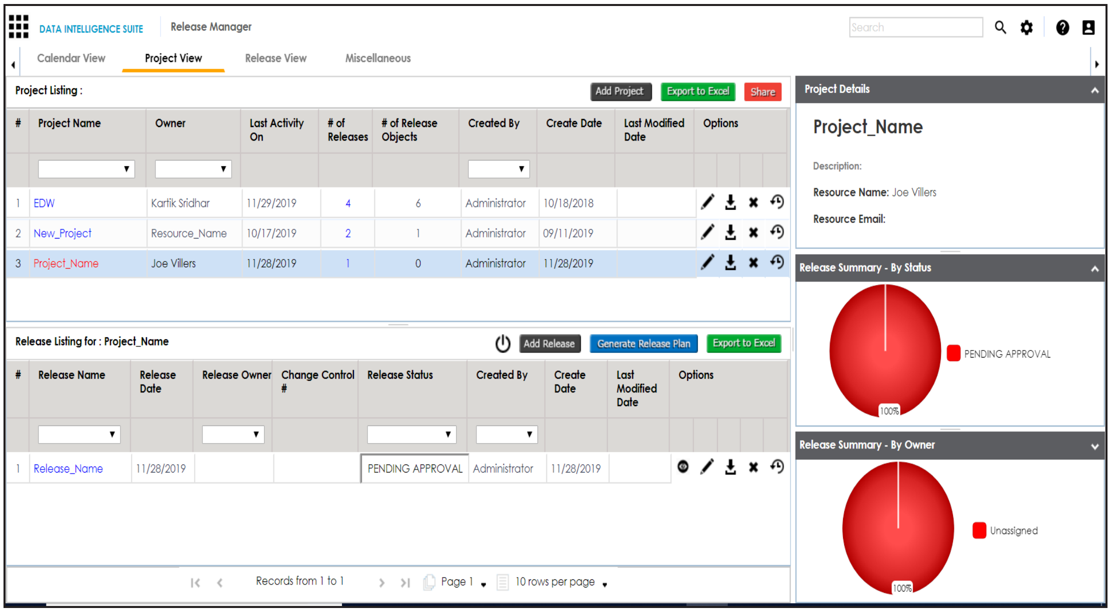
You can move release objects to a different release within the same project or to a release in a different project.

Note: You cannot move a data item mapping object.

To move release objects, follow these steps:

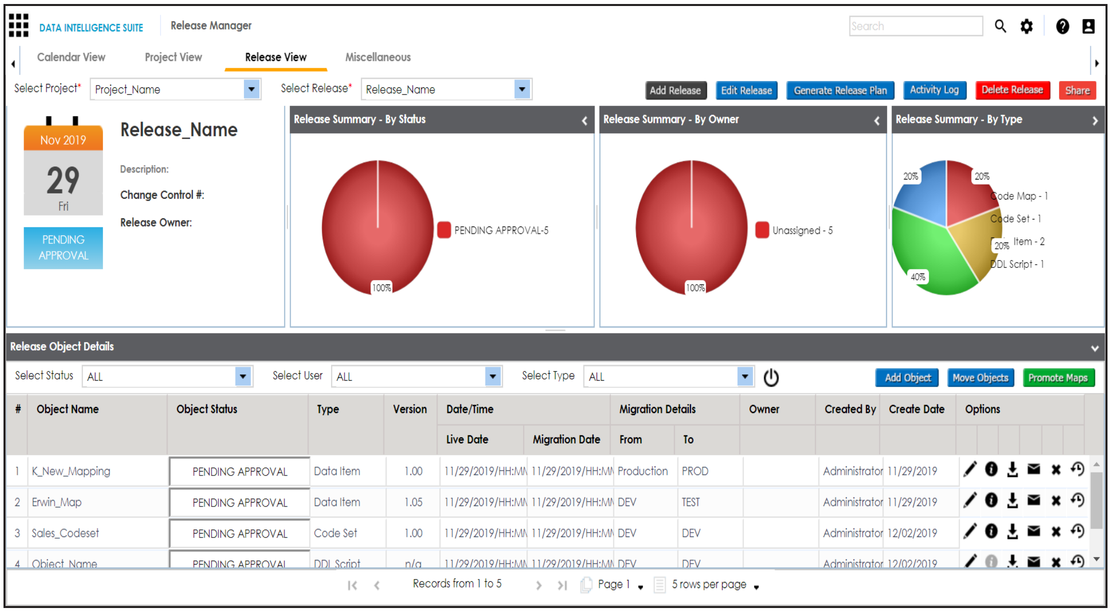
1. Under the **Project View** tab, click the desired project.

   The release listing of the desired project appears.



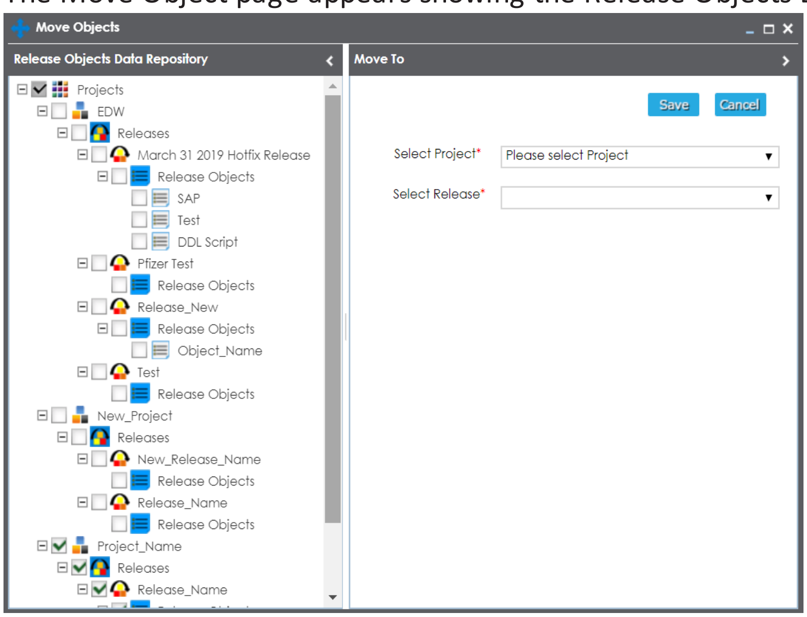
2. Click the desired **<Release Name>**.

   The Release View page appears showing the release object details.



3. Click **Move Object**.

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



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

5. In the **Move To** tab, Select the project and the release where the release objects should move to.
6. Click **Save**.

   The release object moves to the selected project and the selected release.

Sorting Projects and Releases

You can sort project listing in the Project View by:

a. Project Name

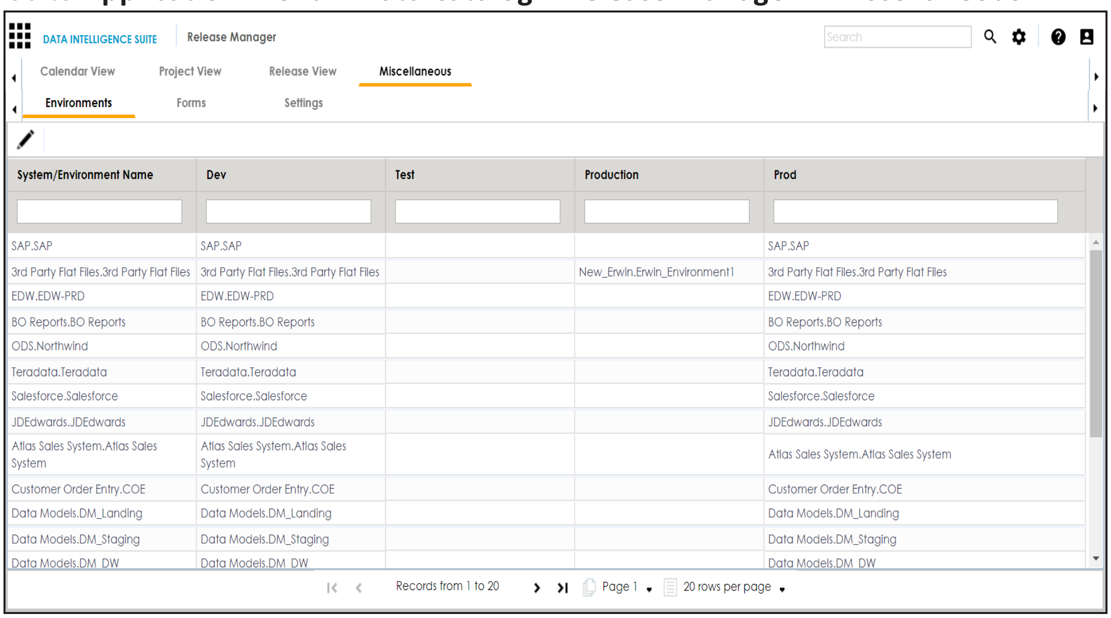
b. Owner

c. Created Date

d. Last Modified Date

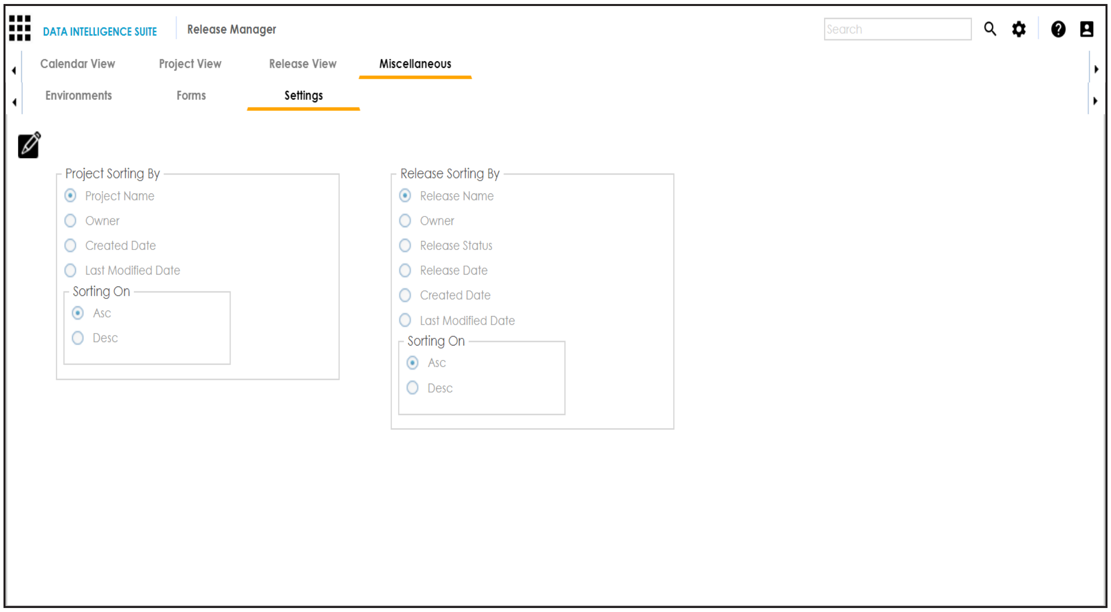
To sort projects, follow these steps:

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



2. Click **Settings**.

   The following page appears.



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

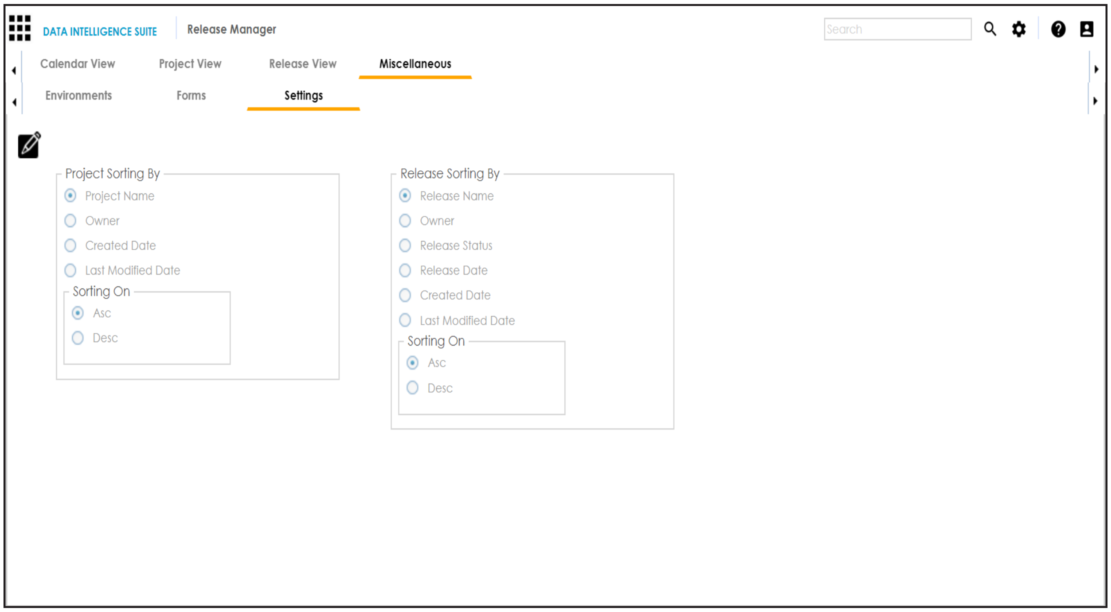
   The project listings are sorted in the Project View.

You can sort release listings by:

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

To sort release listings, follow these steps:

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



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

   The release listings are sorted in the Project View.