

erwin Data Intelligence Suite

Life Cycle Management Guide

Release v10.0

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Managing Life Cycles

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

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

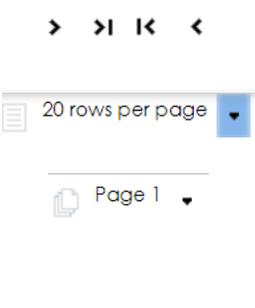
Using Requirements Manager

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

The screenshot shows the Requirements Manager interface. On the left is the 'Requirements Workspace' sidebar with a tree view of 'Specification Templates Catalogue' containing folders like EDW, APJ, Nasdaq PDLC, ARCBS, P_Name, and erwin_Sales. The main area is the 'Projects Summary' table:

#	Project Name	Project Description	Subjects Count	Specifications Count	Specification Artifacts Count	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
2	APJ		0	1	2	Administrator	03/13/2019 23:01:2	Administrator	03/13/2019 23:01:2			
3	ARCBS		0	1	62	Administrator	04/02/2019 14:33:1	Administrator	04/02/2019 14:33:1			
4	erwin_Sales		0	3	1	Administrator	11/05/2019 11:09:3	Administrator	11/06/2019 17:35:4			
5	Nasdaq PDLC		0	1	1	Administrator	03/20/2019 09:54:0	Administrator	03/20/2019 09:54:0			
6	P_Name		0	1	0	Administrator	10/17/2019 16:35:3	Administrator	10/17/2019 16:35:3			

At the bottom, the pagination bar shows: '<< >> Records from 1 to 5 Page 1 25 rows per page'.

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:

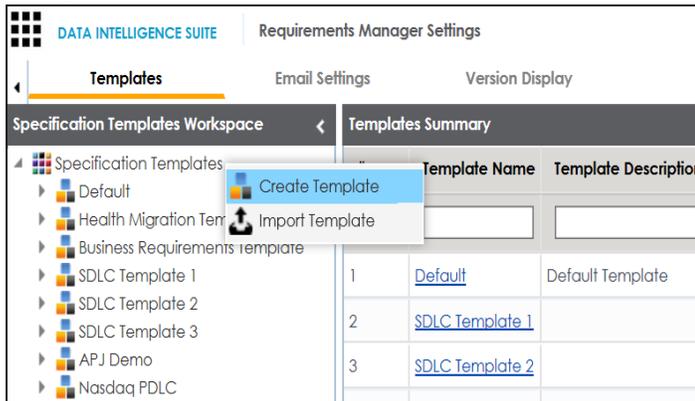
- [Creating and managing templates](#)
- [Creating and managing projects](#)
- [Creating and managing specifications](#)
- [Linking the requirements to mappings](#)

Creating Templates

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

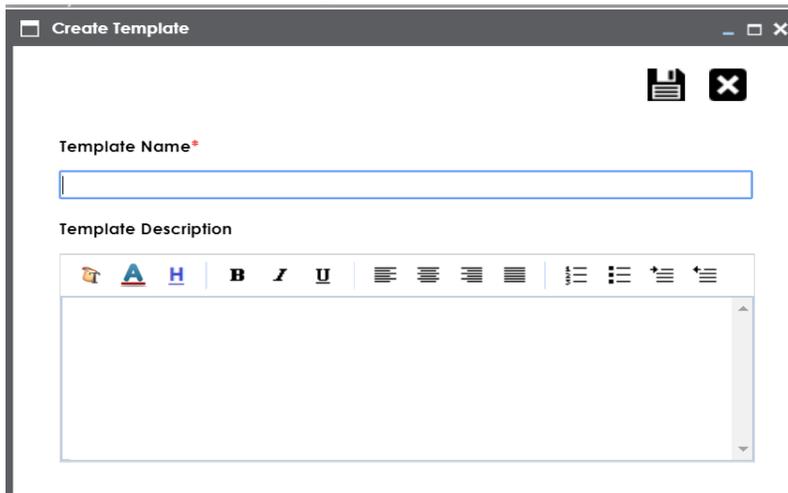
To create new templates, follow these steps:

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.

DATA INTELLIGENCE SUITE | Requirements Manager Settings

Templates | Email Settings | Version

Specification Templates Workspace

- Specification Templates
 - Default
 - Health Migration Template
 - Business Requirements Template
 - SDLC Template 1
 - SDLC Template 2
 - SDLC Template 3
 - APJ Demo
 - Nasdaq PDLC
 - OrganMatch Migration
 - Sales
 - Create Artifact
 - Export Template
 - Edit Template
 - Delete Template

Templates Summary

#	Template Name
1	Default
2	SDLC Template
3	SDLC Template
4	SDLC Template
5	Business Require
6	Health Migratio
7	APJ Demo
8	Nasdaq.PDLC

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: <ul style="list-style-type: none"> ▪ Display Always Displays the artifact in the artifact tree.

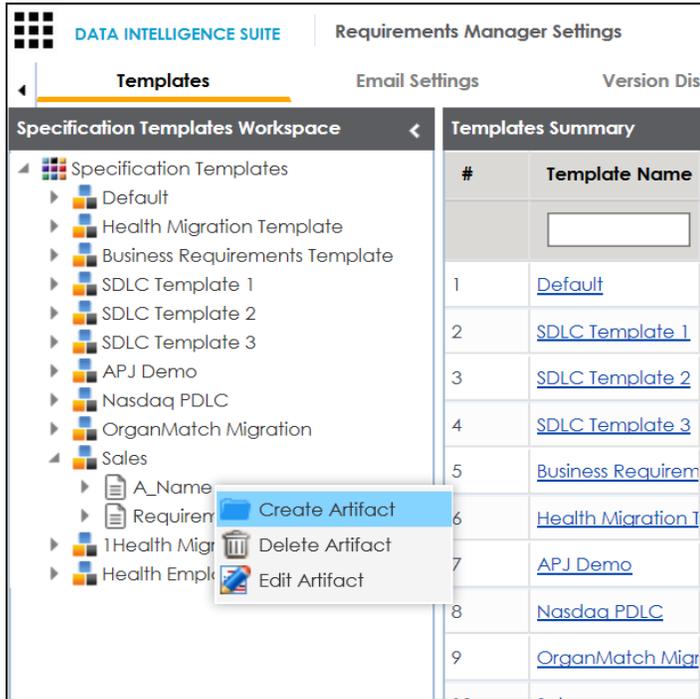
Field Name	Description
	<ul style="list-style-type: none"> ▪ Don't display for single child Does not display the artifact in the artifact tree. ▪ Display on multiple child nodes Displays artifacts when it has more than one child artifacts.
Support Documents Upload	Specifies whether documents can be uploaded 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:

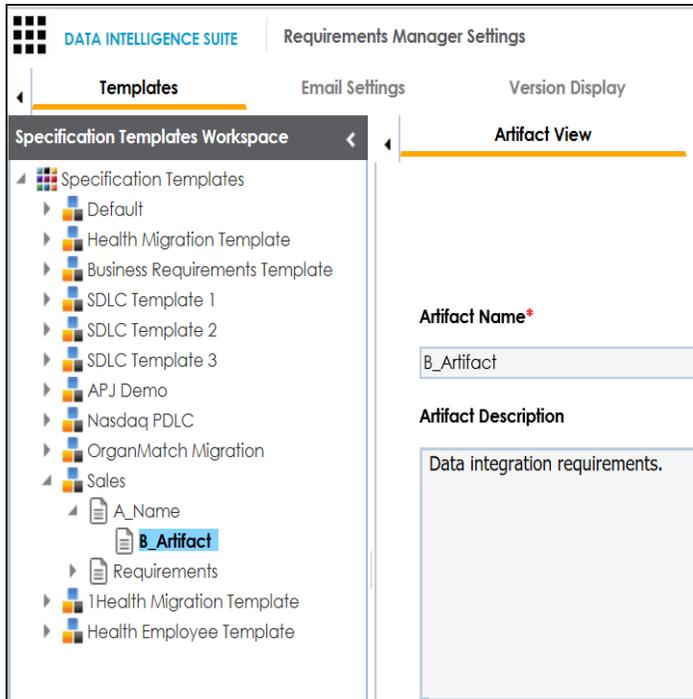
1. Right-click the required artifact and click **Create Artifact**.



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.

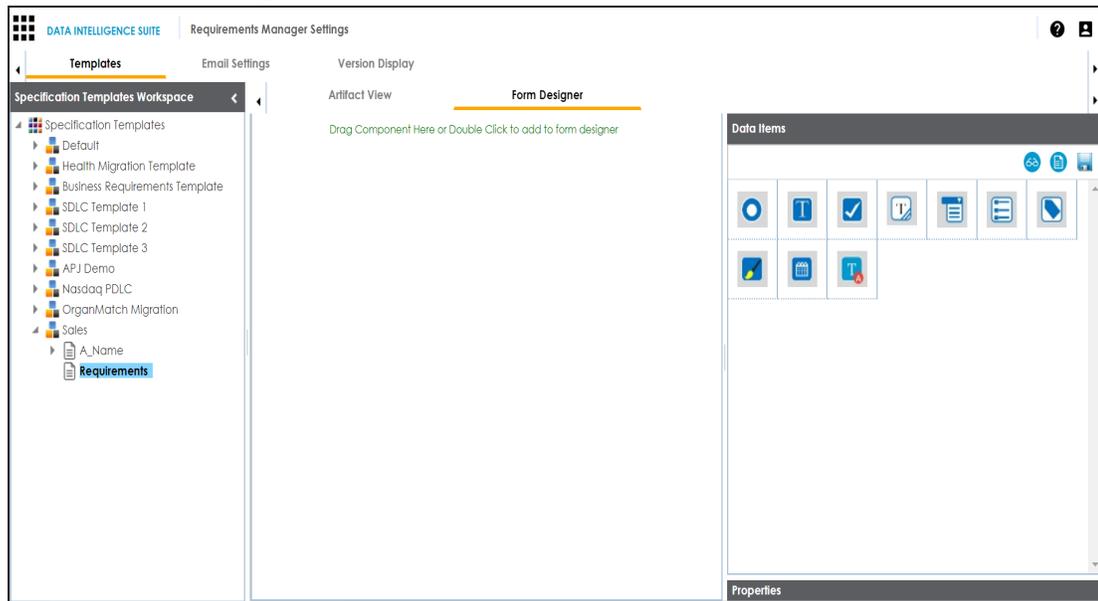
Designing Forms

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:

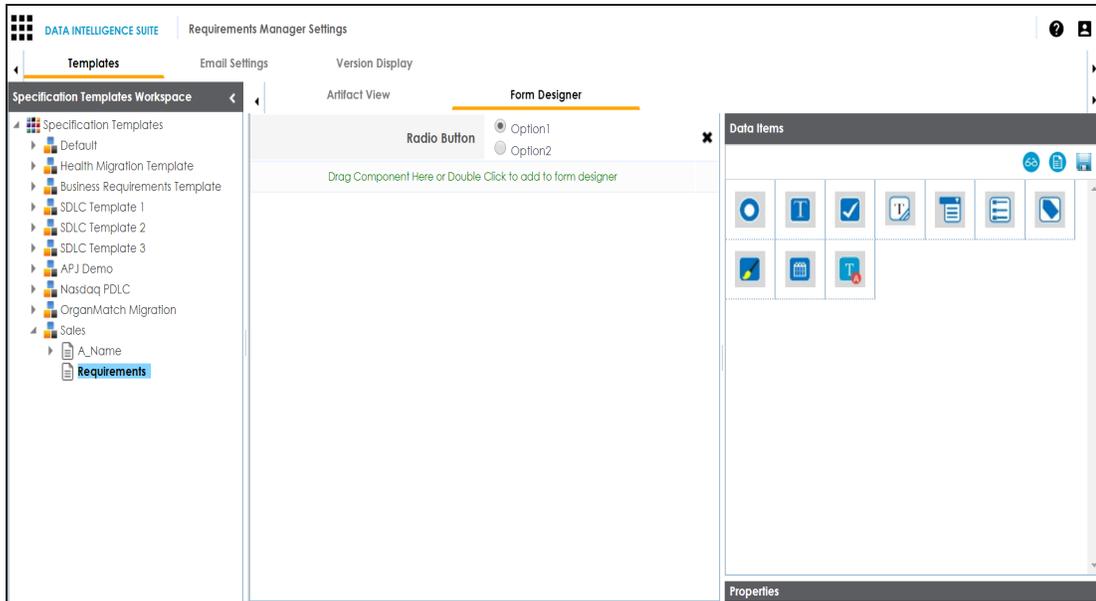
1. Go to **Application Menu > Miscellaneous > Settings > Requirements Manager**.
2. Under the **Specification Templates Workspace** pane, click the required artifact.

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: <ul style="list-style-type: none"> ▪ 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.

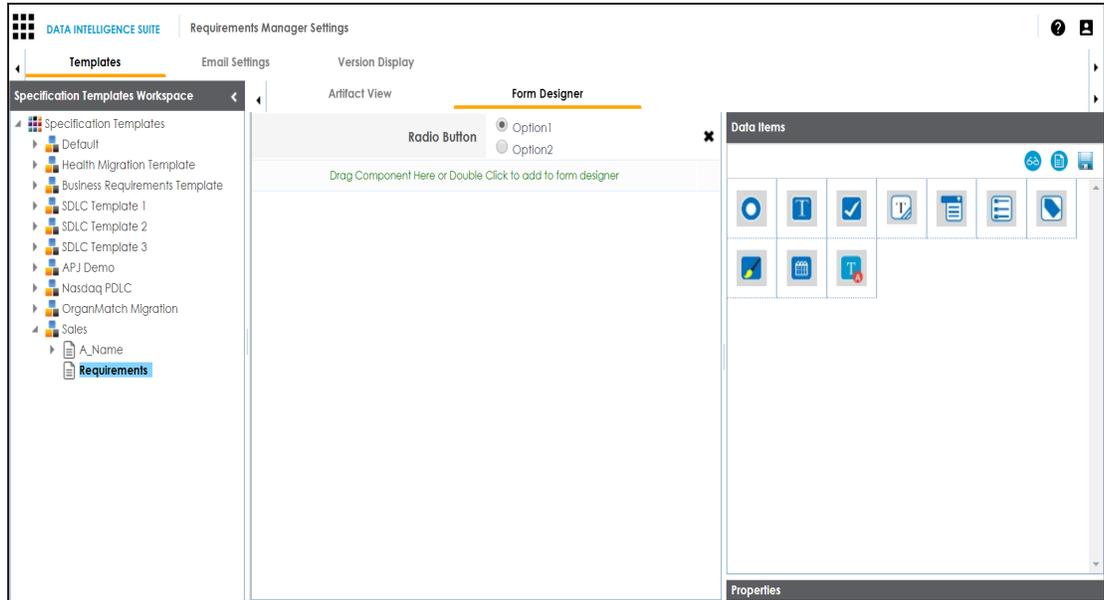
7. Click  to preview.

8. Click .

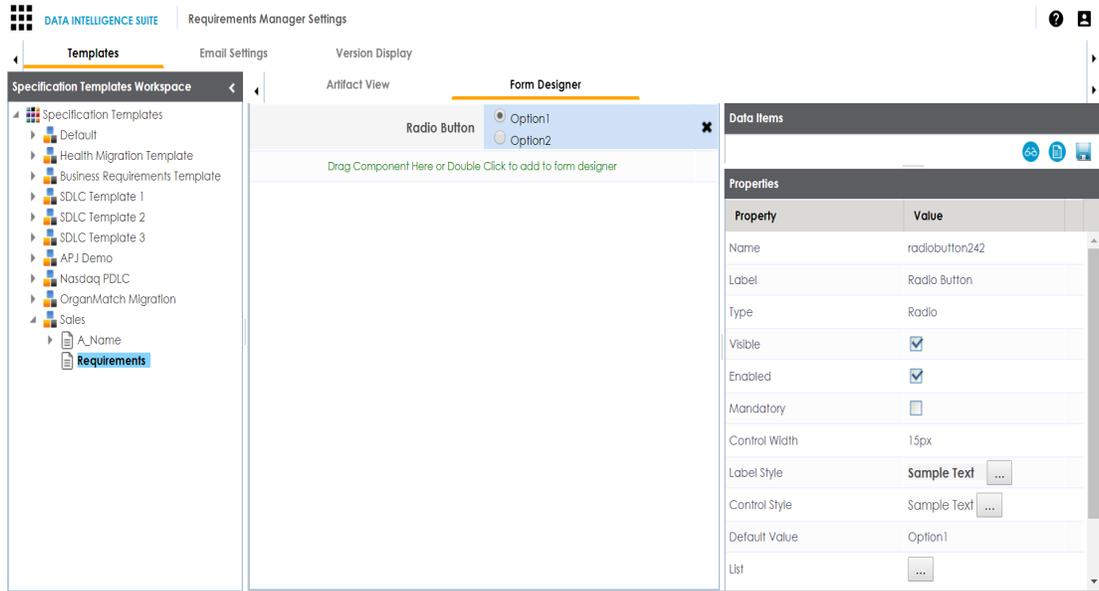
The Master Template Option is saved.

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.

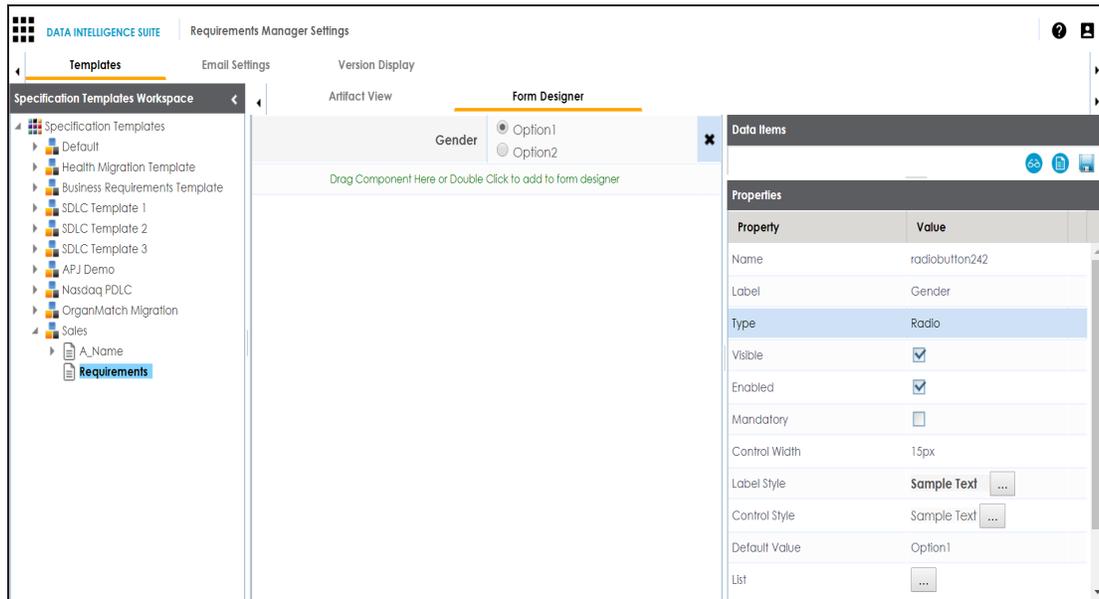


2. Click the cell containing Option 1.
You can view the properties of the data item.

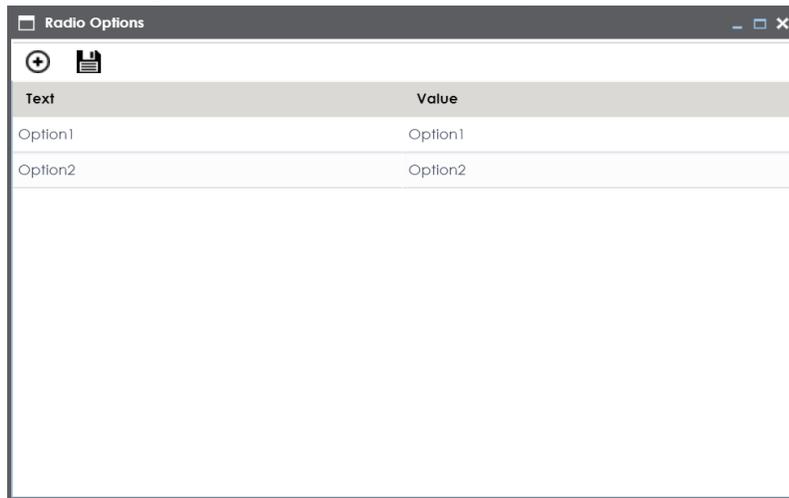


3. Double-click the **Value** cell corresponding to **Label** and edit it to change the Label.

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

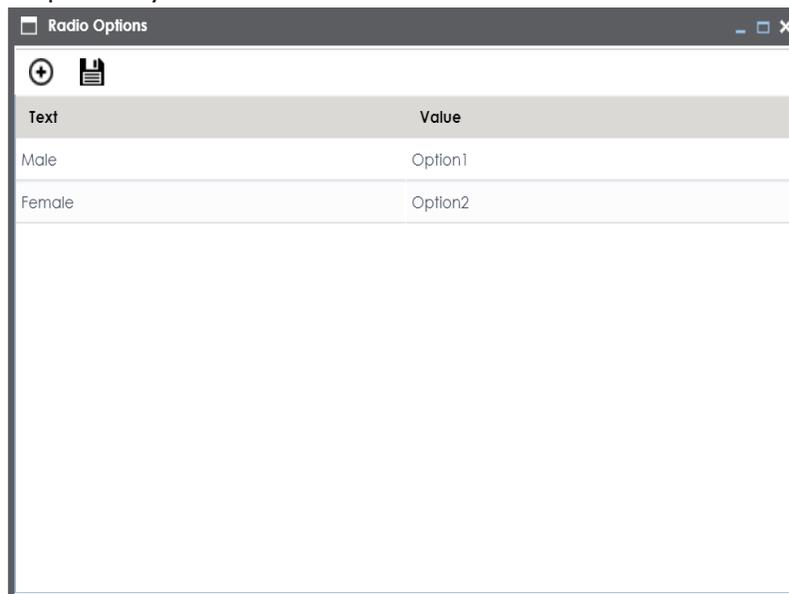


4. Click  against the **List** to edit radio options.



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

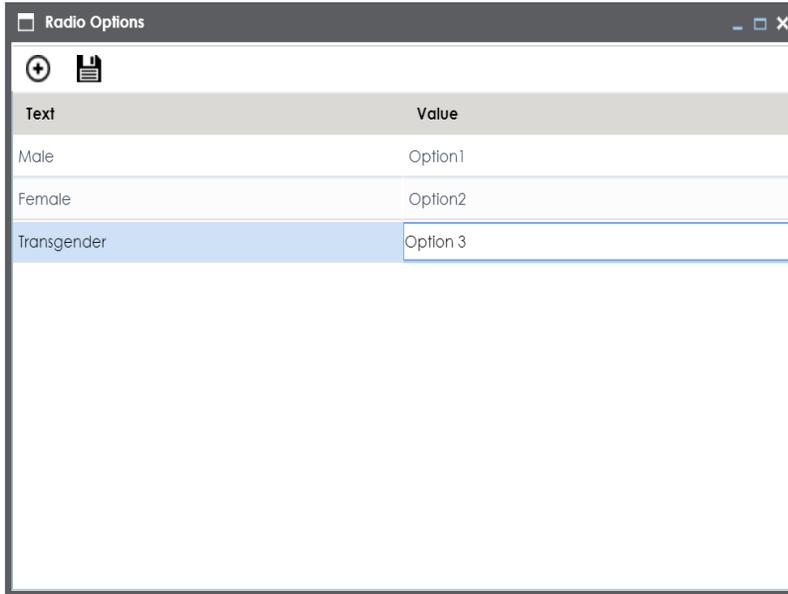
We edited Option 1 text and Option 2 text and entered Male, and Female respectively.



6. Click  to add more options.

One row is added.

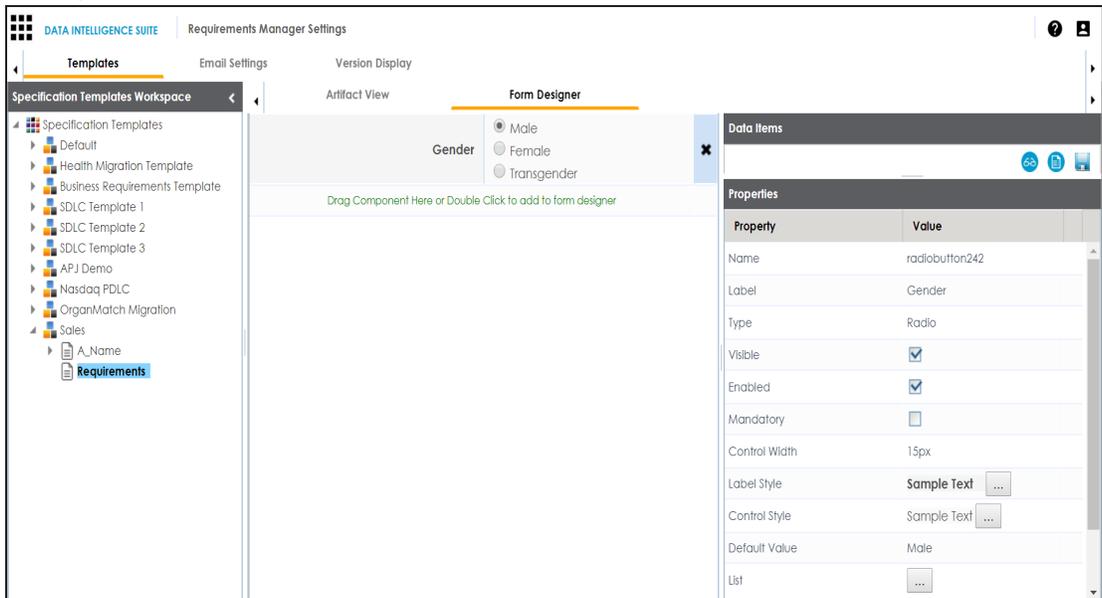
7. Double-click the cells to enter the option.



Text	Value
Male	Option1
Female	Option2
Transgender	Option3

8. Click .

The options in the form are modified.



DATA INTELLIGENCE SUITE Requirements Manager Settings

Templates Email Settings Version Display

Specification Templates Workspace Artifact View Form Designer

Gender Male Female Transgender

Drag Component Here or Double Click to add to form designer

Data Items

Properties

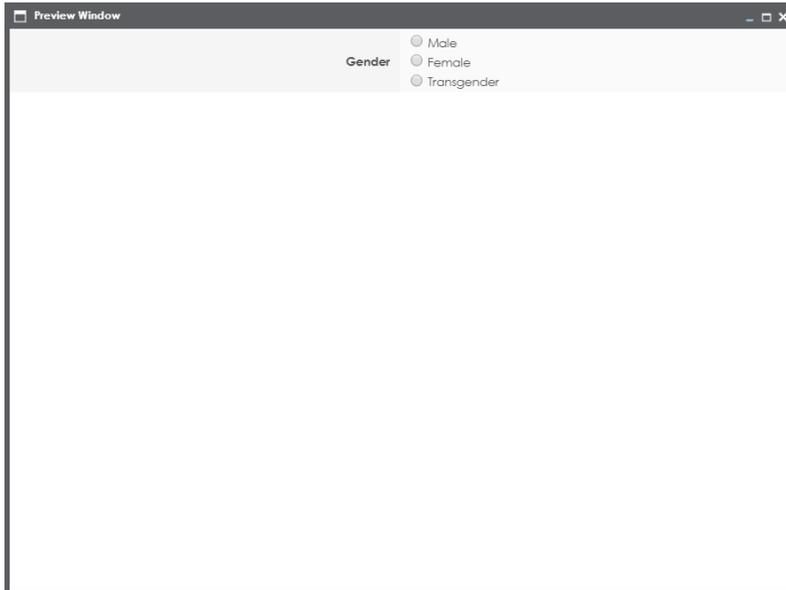
Property	Value
Name	radiobutton242
Label	Gender
Type	Radio
Visible	<input checked="" type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Mandatory	<input type="checkbox"/>
Control Width	15px
Label Style	Sample Text ...
Control Style	Sample Text ...
Default Value	Male
List	...

9. Click .

The Master Template Option is saved.

10. Click  to preview.

The Preview Window appears.



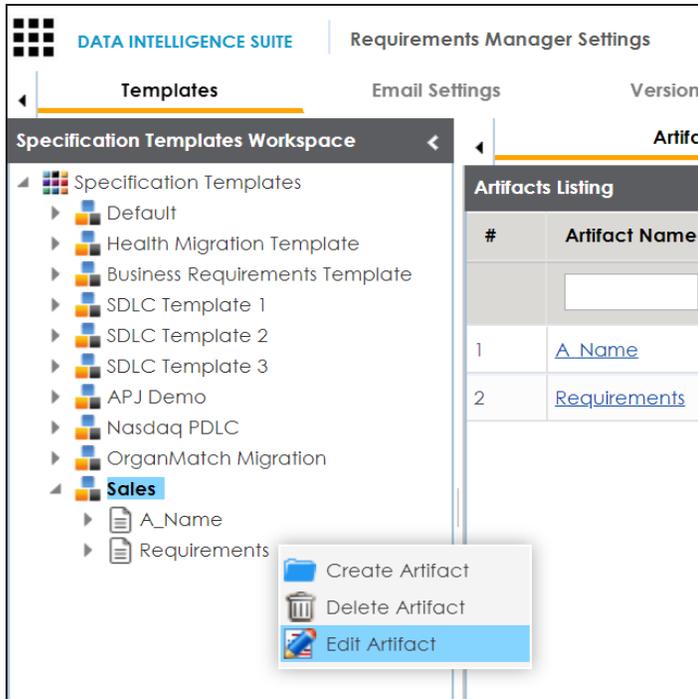
Managing Artifacts

Managing artifacts involves:

- Editing artifacts
- Deleting artifacts

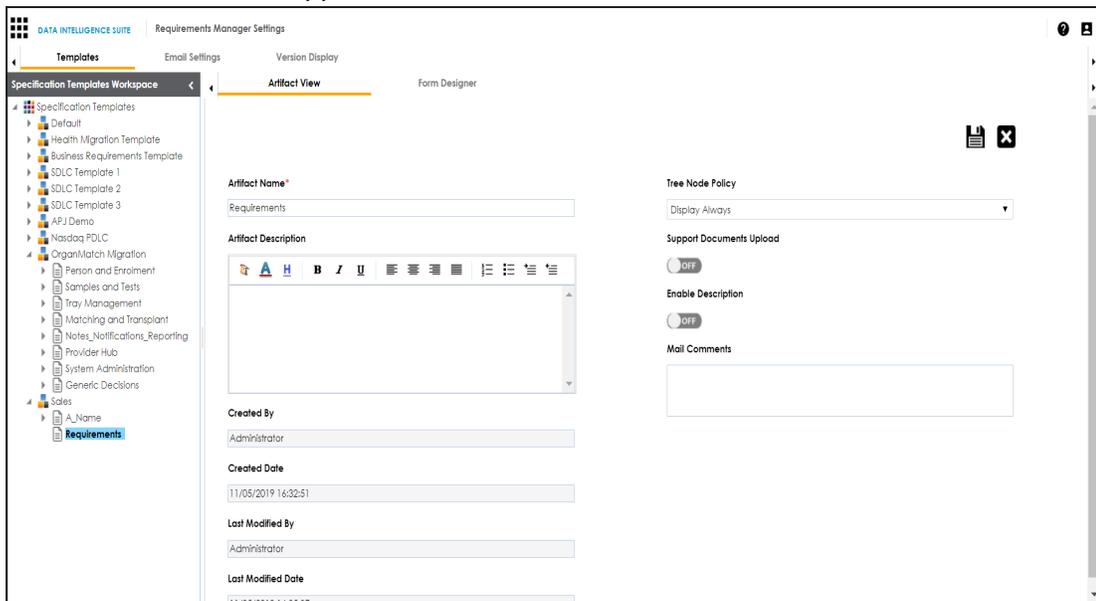
To edit artifacts, follow these steps:

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.

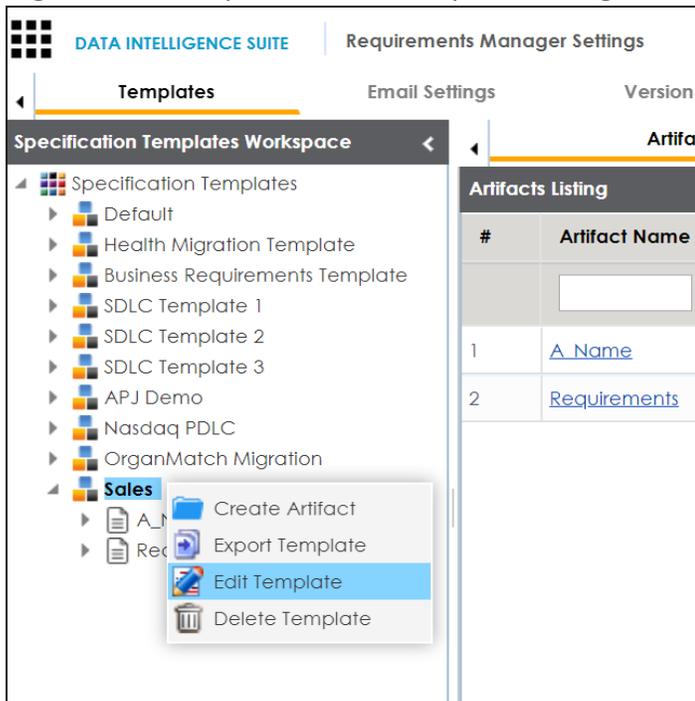
Managing Templates

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

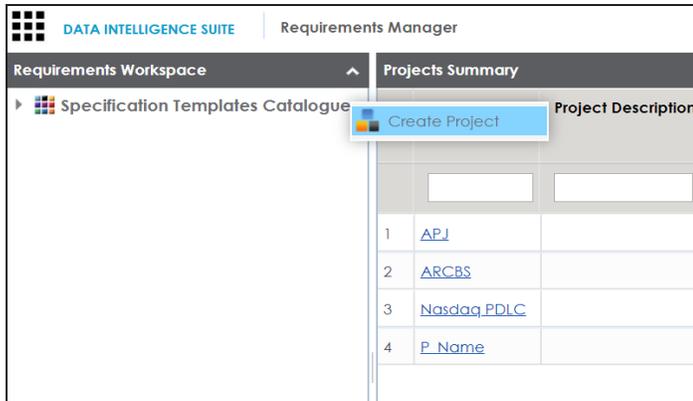
Use this option to delete the template.

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.

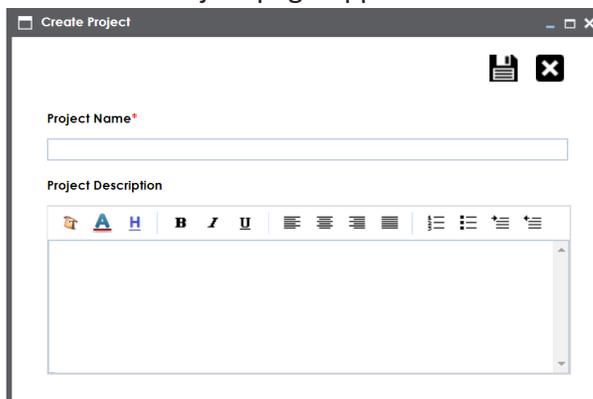
To create projects, follow these steps:

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](#)

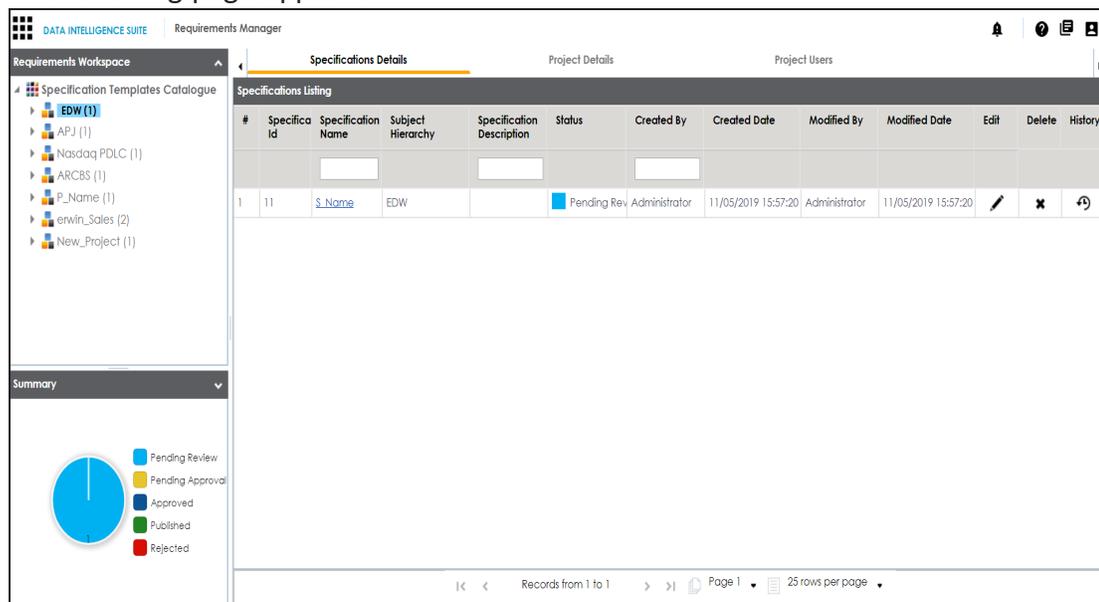
Assigning Users to Projects

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.

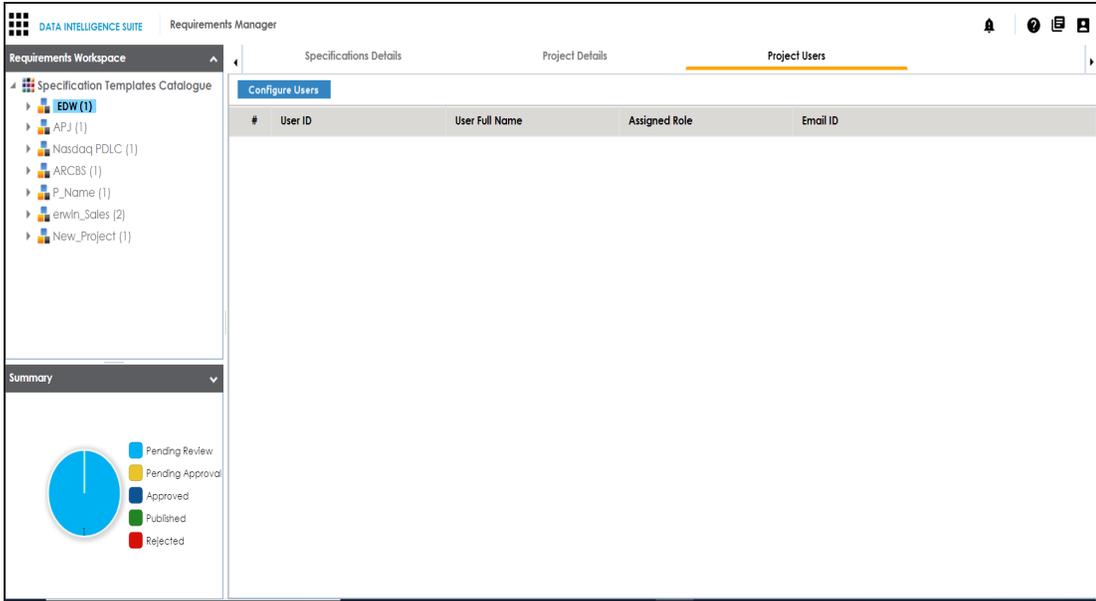
The following page appears.



The screenshot displays the Requirements Manager interface. On the left, the 'Requirements Workspace' pane shows a tree view of 'Specification Templates Catalogue' with a project node 'EDW (1)' selected. Below this is a 'Summary' section with a pie chart and a legend for status categories: Pending Review (blue), Pending Approval (yellow), Approved (dark blue), Published (green), and Rejected (red). The main area shows 'Specifications Listing' with a table containing one row of data. The table has columns for #, Specification Id, Specification Name, Subject Hierarchy, Specification Description, Status, Created By, Created Date, Modified By, Modified Date, Edit, Delete, and History. The row shows a specification with ID 11, name 'S_Name', subject hierarchy 'EDW', and status 'Pending Rev'.

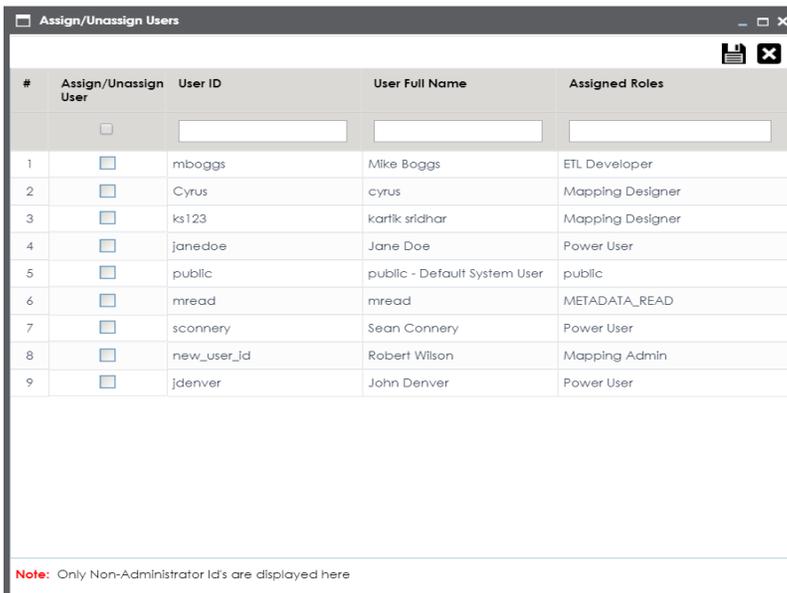
#	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	11	S_Name	EDW		Pending Rev	Administrator	11/05/2019 15:57:20	Administrator	11/05/2019 15:57:20			

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.

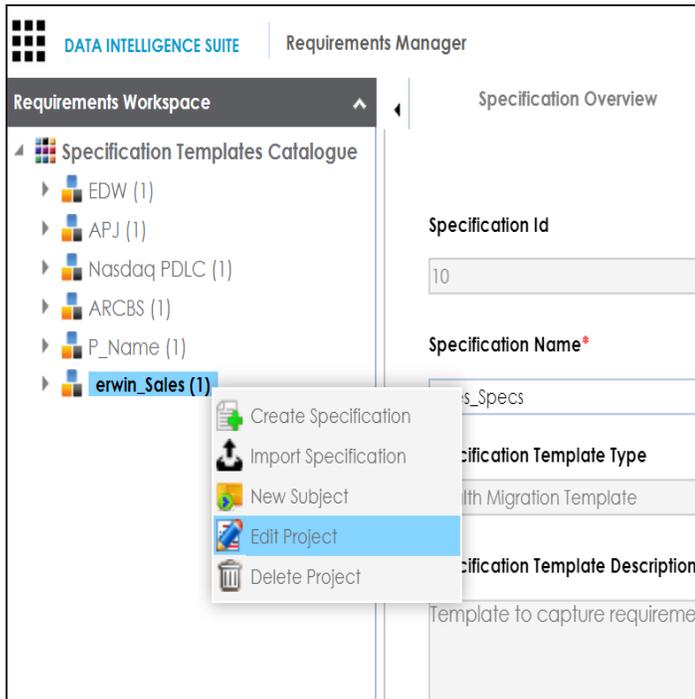
Managing Projects

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

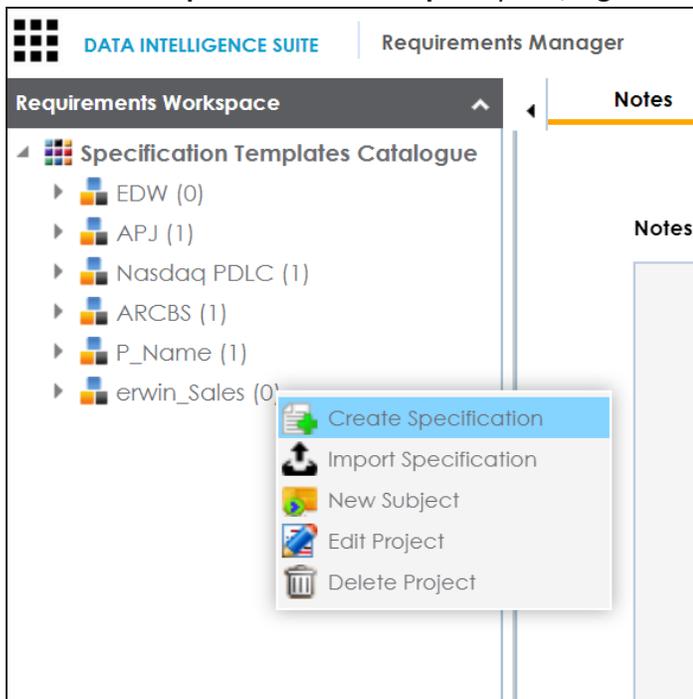
Use this option to delete the project.

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.

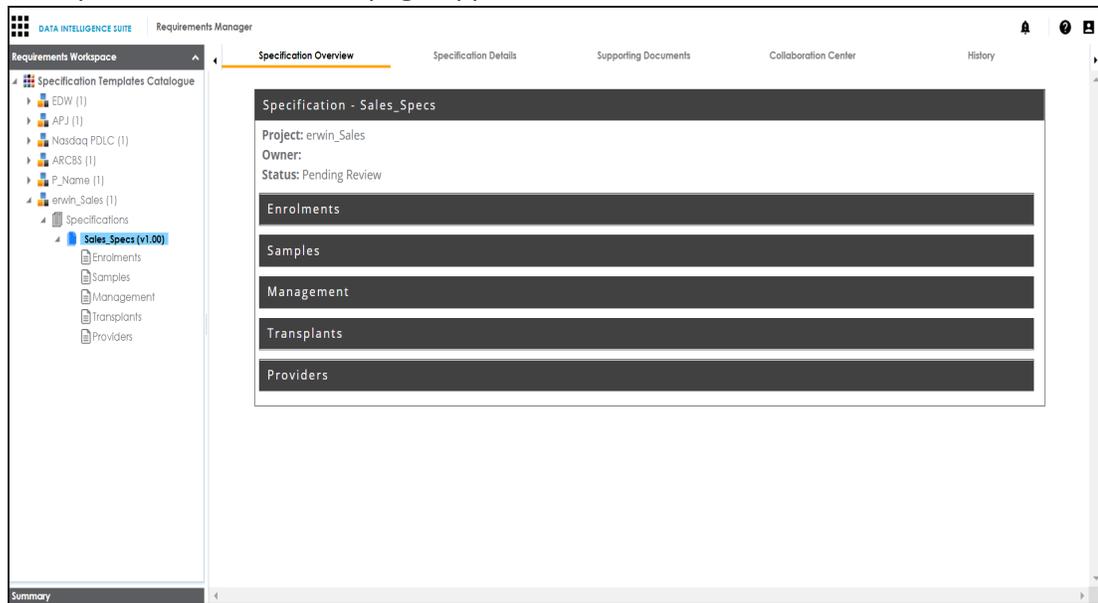
You can also specify:

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

To upload supporting documents to specifications, follow these steps:

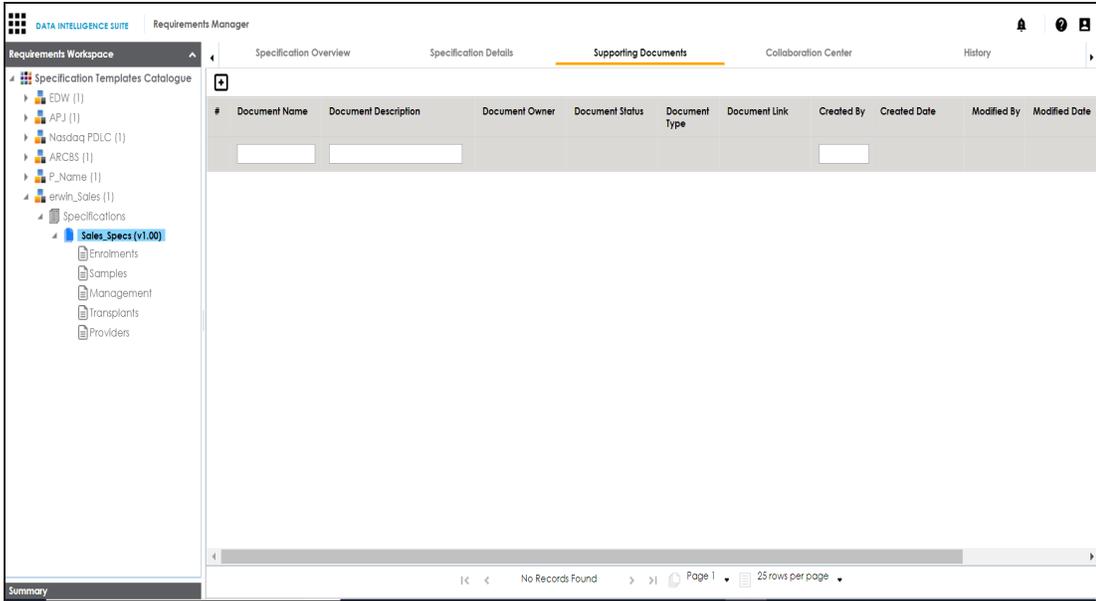
1. Go to **Application Menu > Data Catalog > Requirements Manager**.
2. Under the **Requirements Workspace** pane, click the required specification.

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/d/2sC2_SZlyeFKI7OOn-b5YkMBq4ptA7jh5/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 .

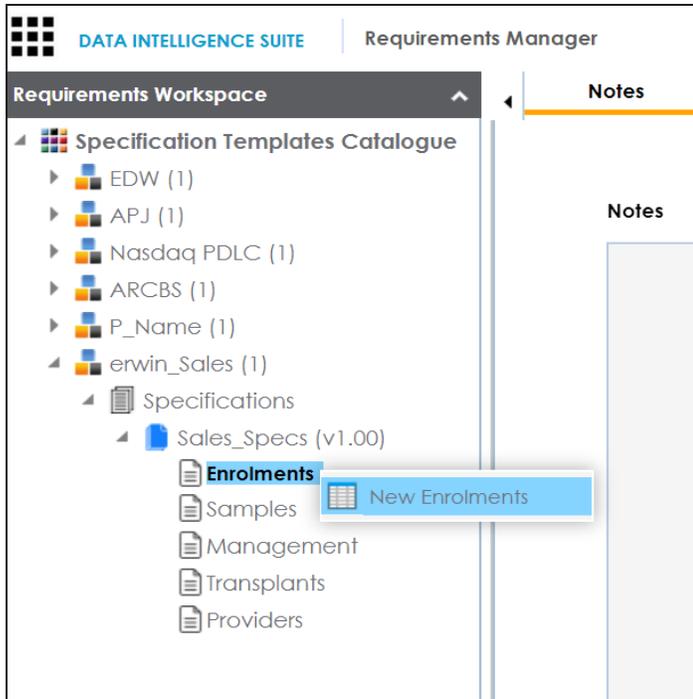
The document is saved under the Supporting Documents tab.

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>.

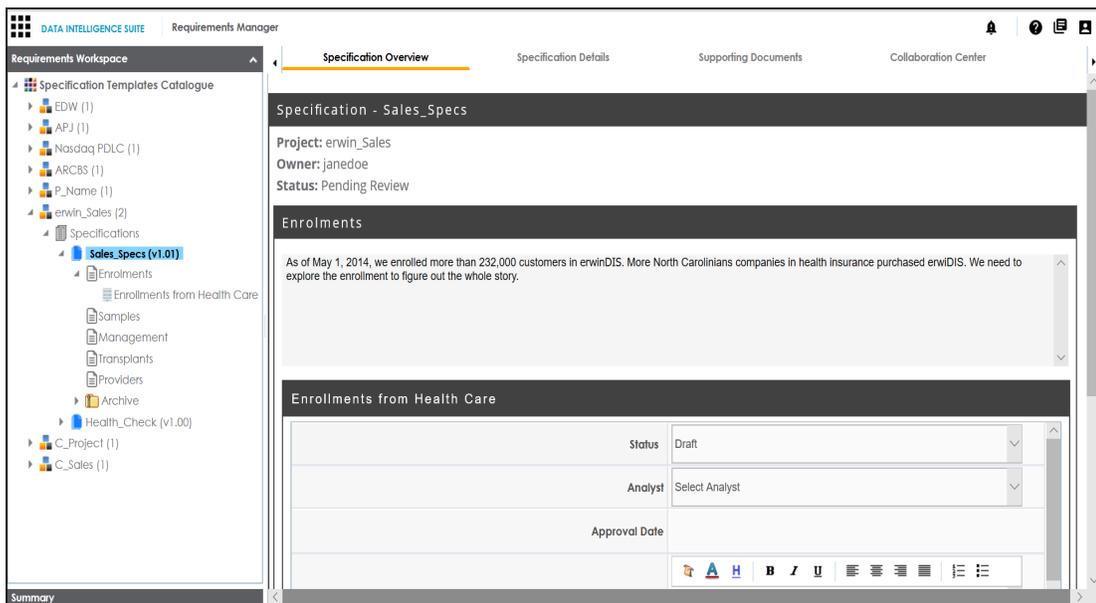
The New Specification Artifact page appears.

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.



The screenshot displays the Requirements Manager interface. On the left, a tree view shows the 'Specification Templates Catalogue' with various artifacts. The 'Sales_Specs (v1.01)' artifact is selected. The main pane shows the 'Specification Overview' for 'Sales_Specs'. The project details are: Project: erwin_Sales, Owner: janedoe, Status: Pending Review. The 'Enrollments' section contains a text block: 'As of May 1, 2014, we enrolled more than 232,000 customers in erwinDIS. More North Carolinians companies in health insurance purchased erwinDIS. We need to explore the enrollment to figure out the whole story.' Below this, the 'Enrollments from Health Care' section shows a table with columns for Status (Draft), Analyst (Select Analyst), and Approval Date. A rich text editor toolbar is visible at the bottom of the main pane.

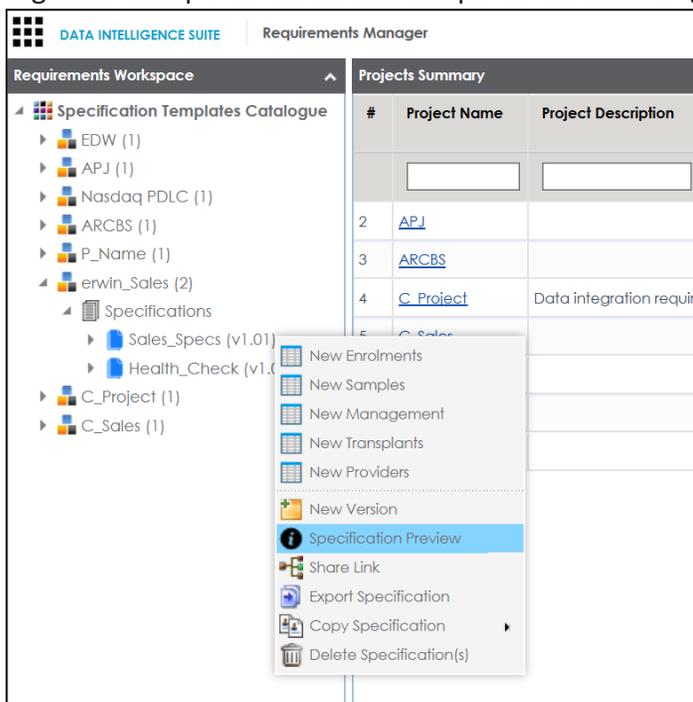
Managing Specifications

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

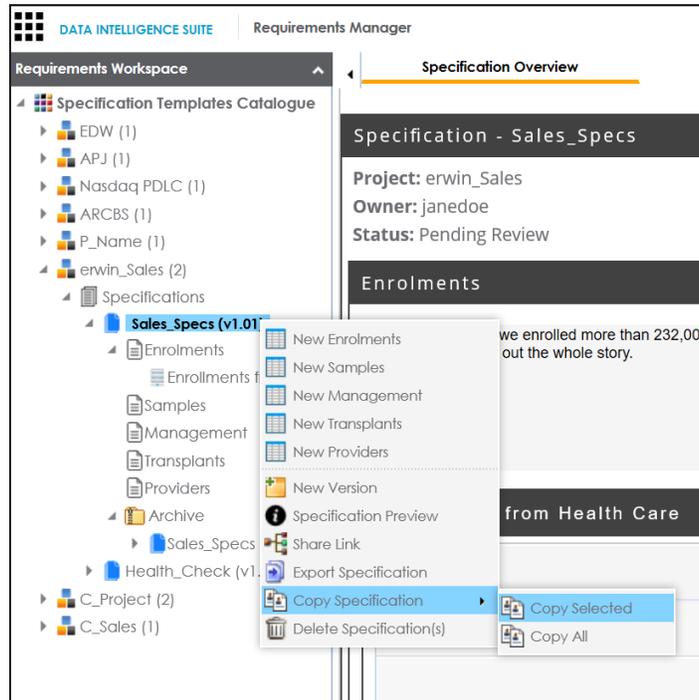
Use this option to obtain URL of the specification. You can copy the URL or send the URL through an email using MS Outlook.

Export Specification

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

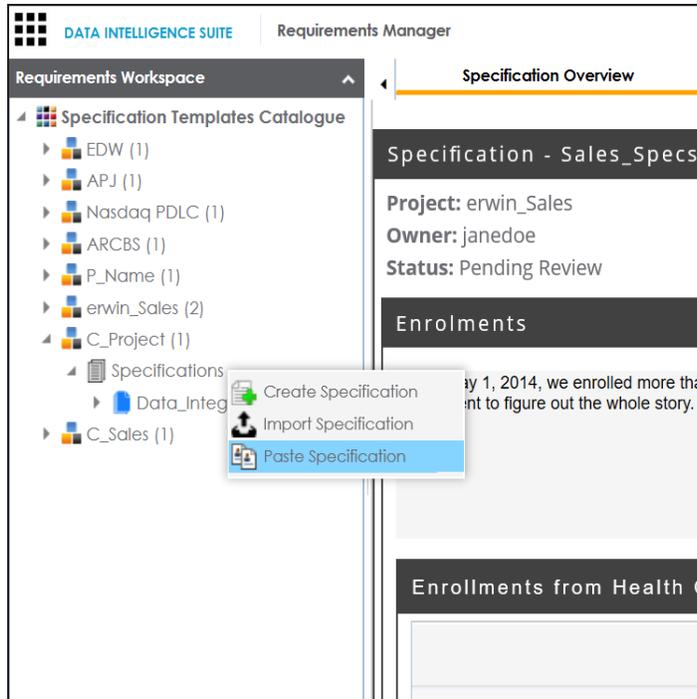
Copy Specification

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.

#	Specifica Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	14	Health_Check	erwin_Sales		Pending Rev	Administrator	11/07/2019 12:51:02	Administrator	11/07/2019 12:51:02			
2	12	Sales_Specs	erwin_Sales		Pending Rev	Administrator	11/07/2019 11:42:48	Administrator	01/21/2020 18:08:37			

2. Click .

The Specification Details page appears in editable mode.

3. Update the fields and click .

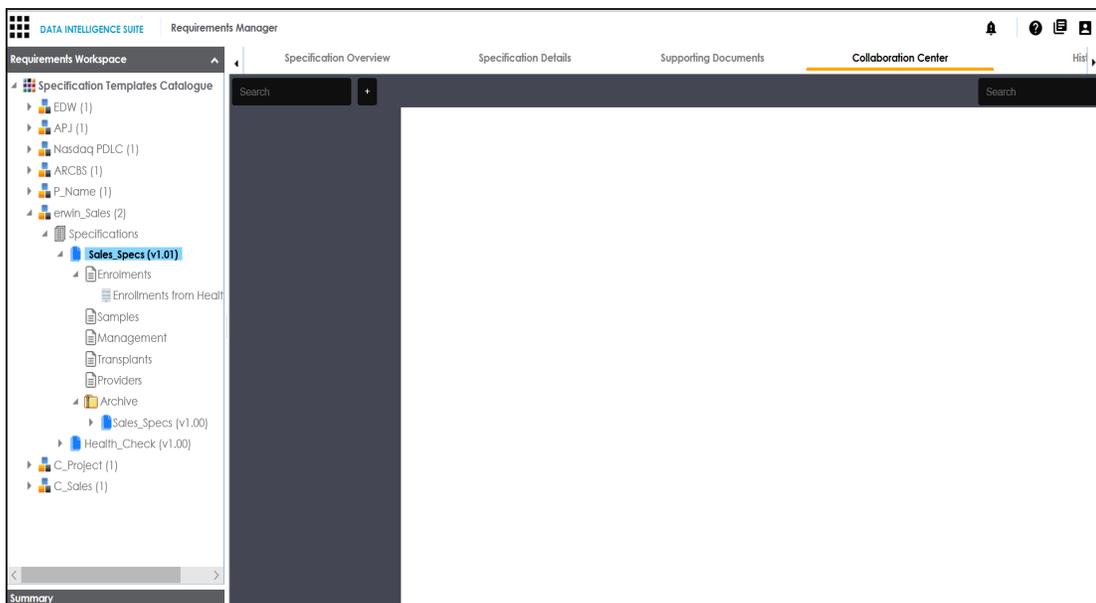
The specification is updated.

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.

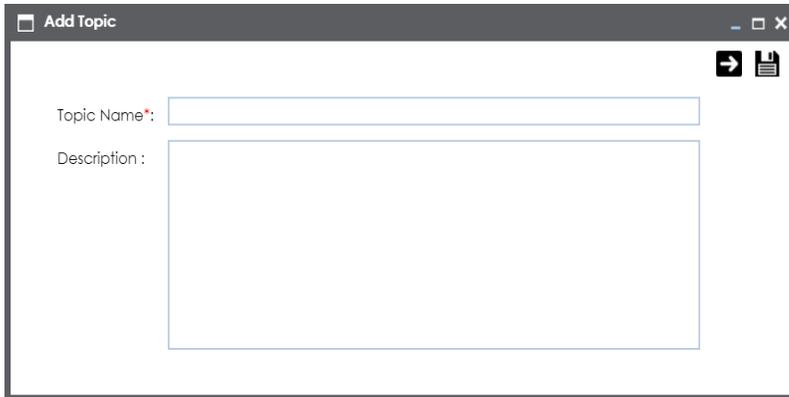
To collaborate with other users, follow these steps:

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



2. Click  to add a topic.

The Add Topic page appears.

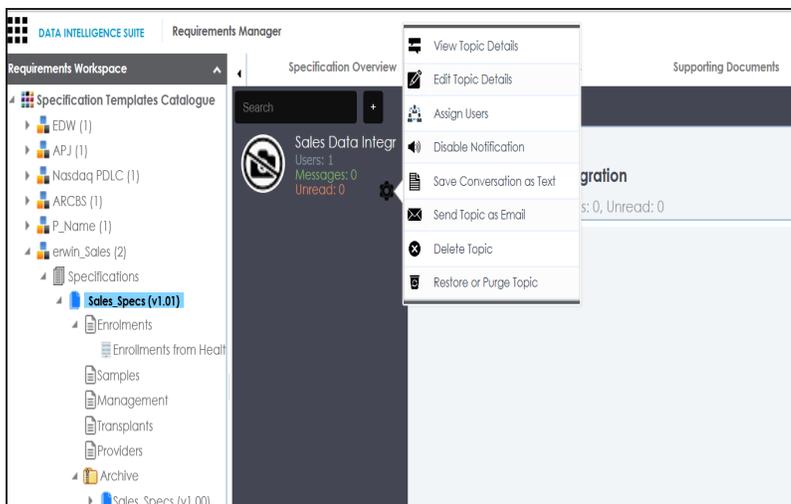


3. Enter Topic Name and Description.

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

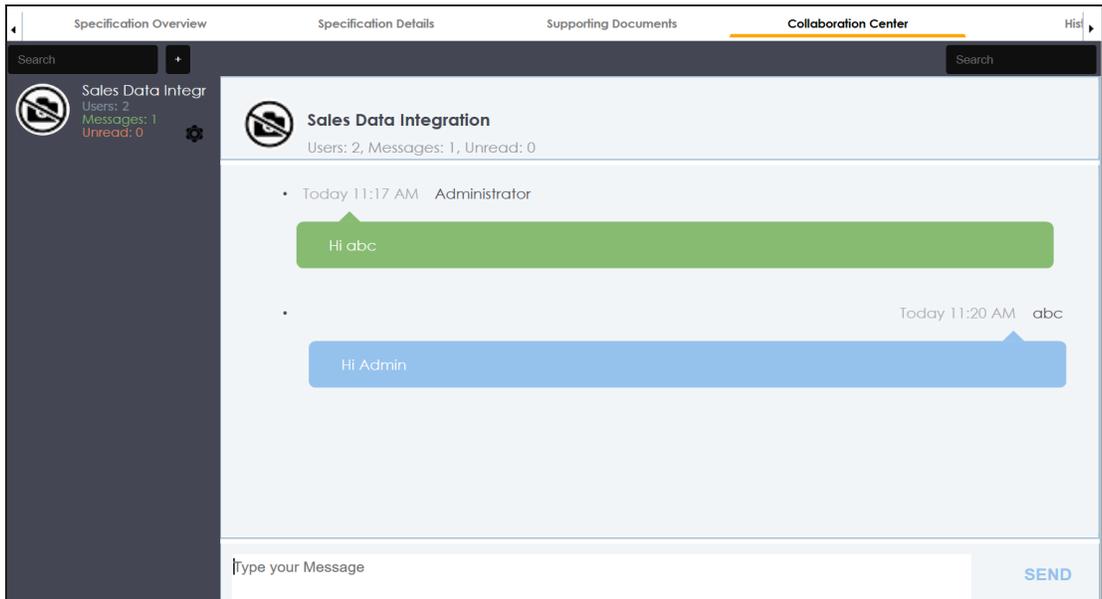
Use this option to edit the topic details.

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.

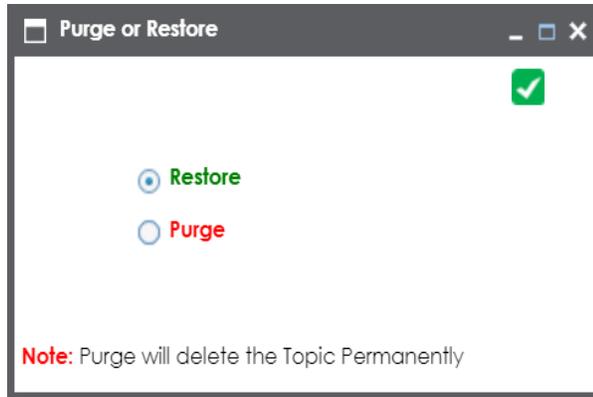
Delete Topic

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 .

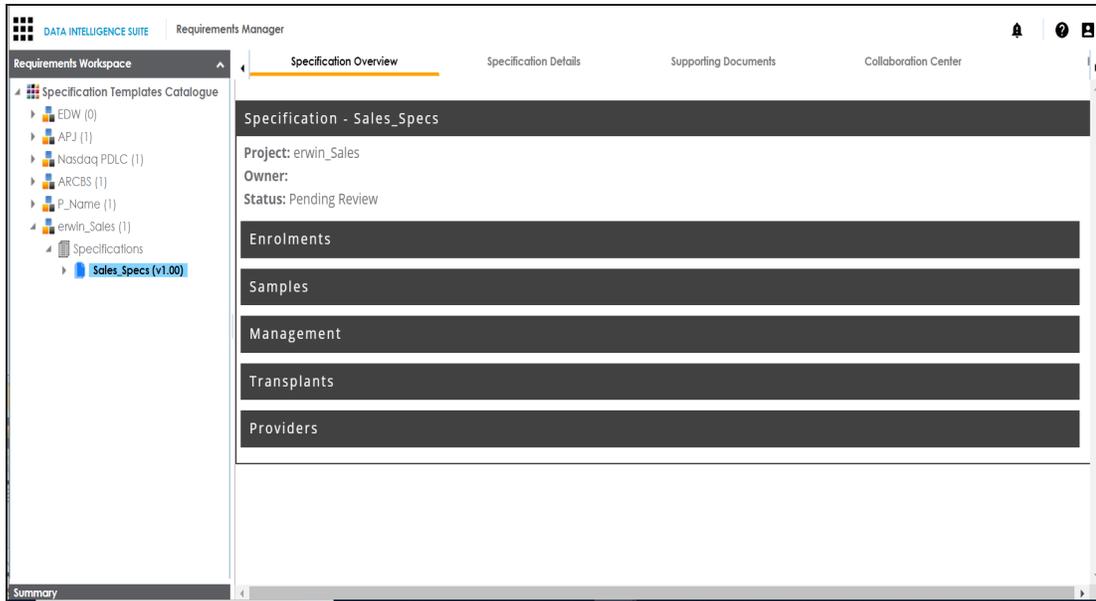
Documenting Requirements

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.

The screenshot shows the 'Requirements Manager' interface. On the left is a 'Specifications Catalogue' tree with 'Sales_Specs (v1.00)' selected. The main area is a table with columns: #, Project Name, Project Description, Subjects Count, Specification Count, Specification Artifacts Count, Created By, Created Date, Modified By, Modified Date, Edit, Dele, and History. A context menu is open over the first row, with 'New Version' highlighted. The table data is as follows:

#	Project Name	Project Description	Subjects Count	Specification Count	Specification Artifacts Count	Created By	Created Date	Modified By	Modified Date	Edit	Dele	History
1	APJ		0	1	2	Administrato	03/13/2019 23:0	Administrato	03/13/2019 23:0			
2	ARCBS		0	1	62	Administrato	04/02/2019 14:3	Administrato	04/02/2019 14:3			
3	erwin_Sales		0	1	0	Administrato	11/05/2019 11:0	Administrato	11/06/2019 17:3			
			0	1	1	Administrato	03/20/2019 09:5	Administrato	03/20/2019 09:5			
			0	1	0	Administrato	10/17/2019 16:3	Administrato	10/17/2019 16:3			

2. Click **New Version**

The New Version page appears.

The 'New Version' form contains the following fields and components:

- Specification Name:** Text input field containing 'Sales_Specs'.
- Specification Version:** Text input field containing '1.01'.
- Version Label:** Empty text input field.
- Change Description:** Rich text editor with a toolbar (bold, italic, underline, list, link, unlink, undo, redo) and a large text area.
- Mail Comments:** Empty text input field.

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.

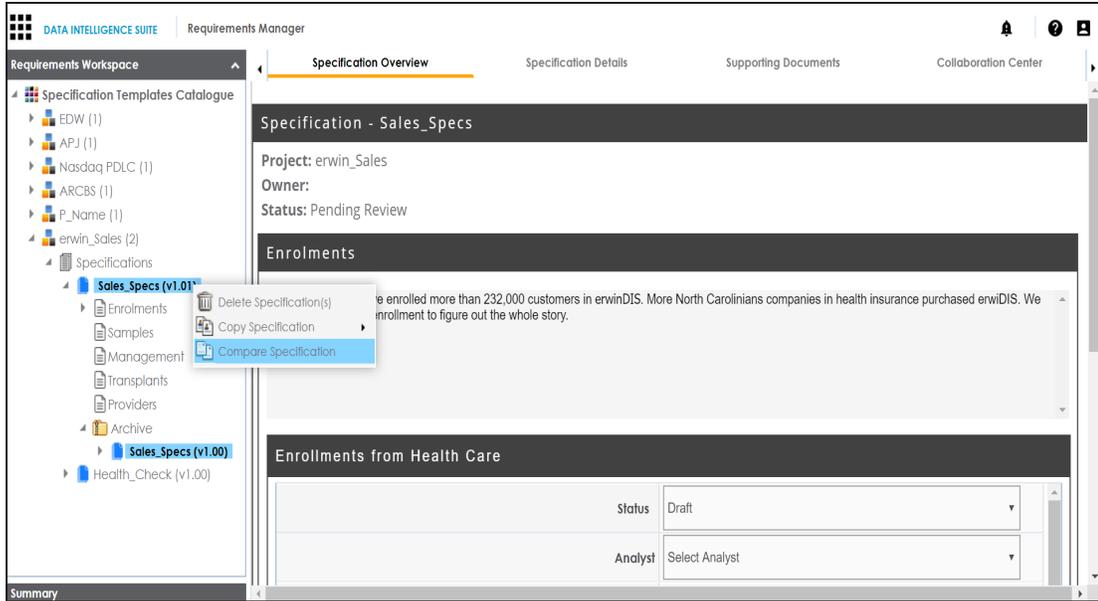
4. Click .

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.

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

Color Representation

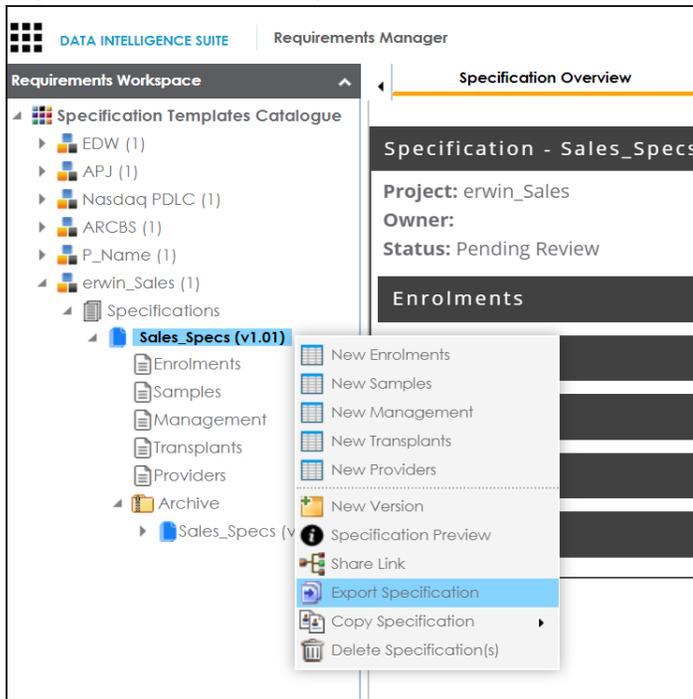
- - Changed Presentation
- - Unchanged Presentation

Exporting and Importing Specifications

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

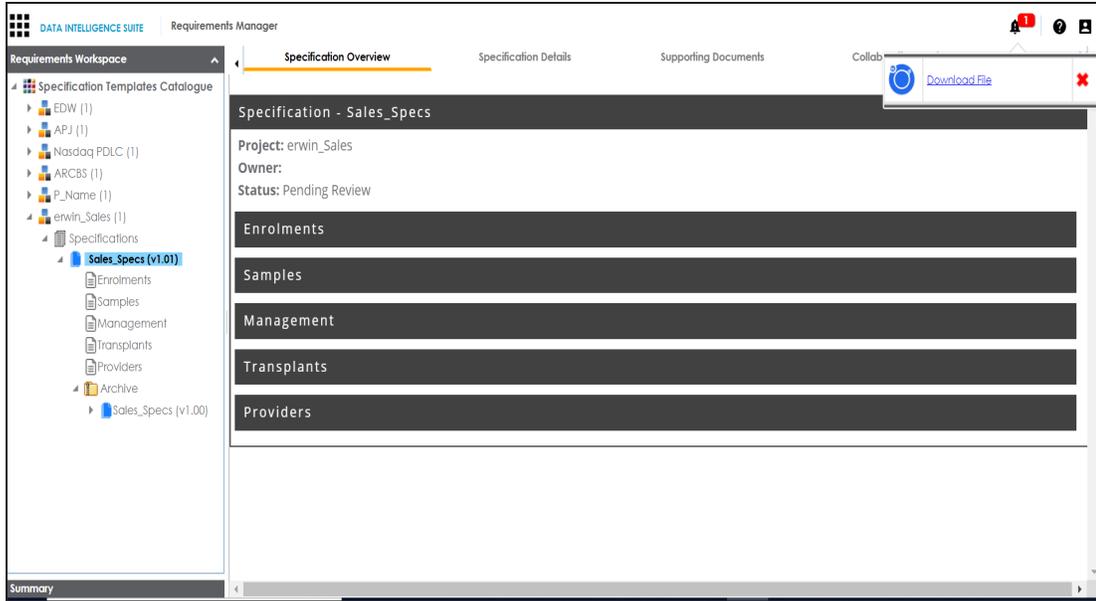
To export specifications, follow these steps:

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:

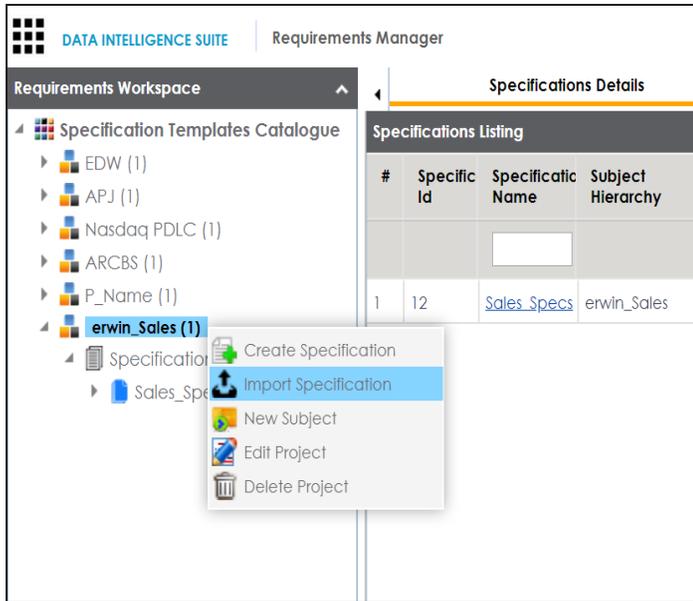
1. Unzip the exported specification.

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.

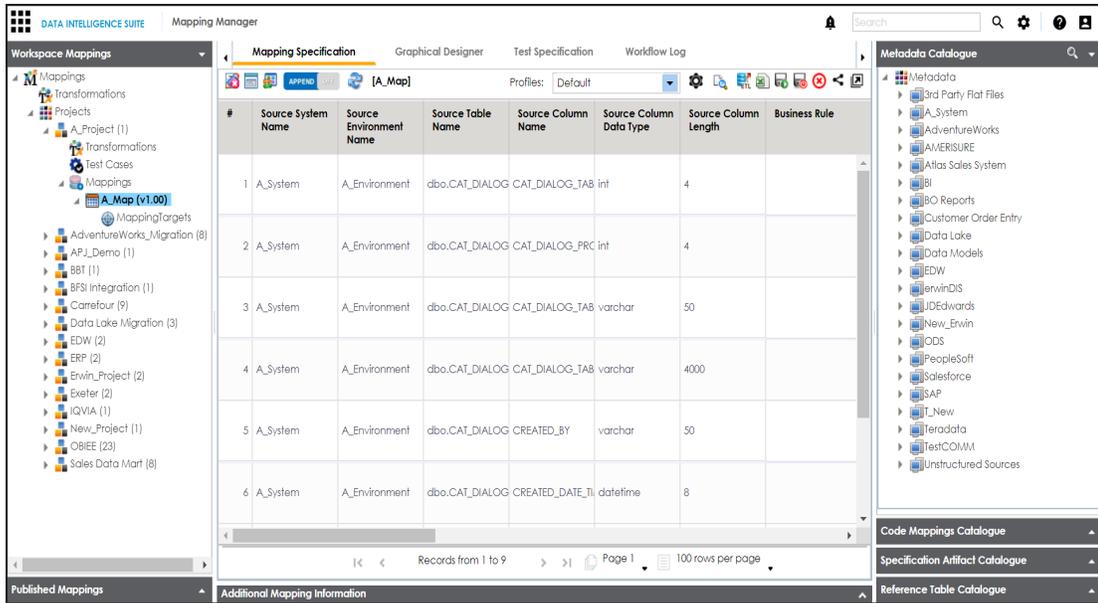
Linking Requirements to Data Mappings

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:

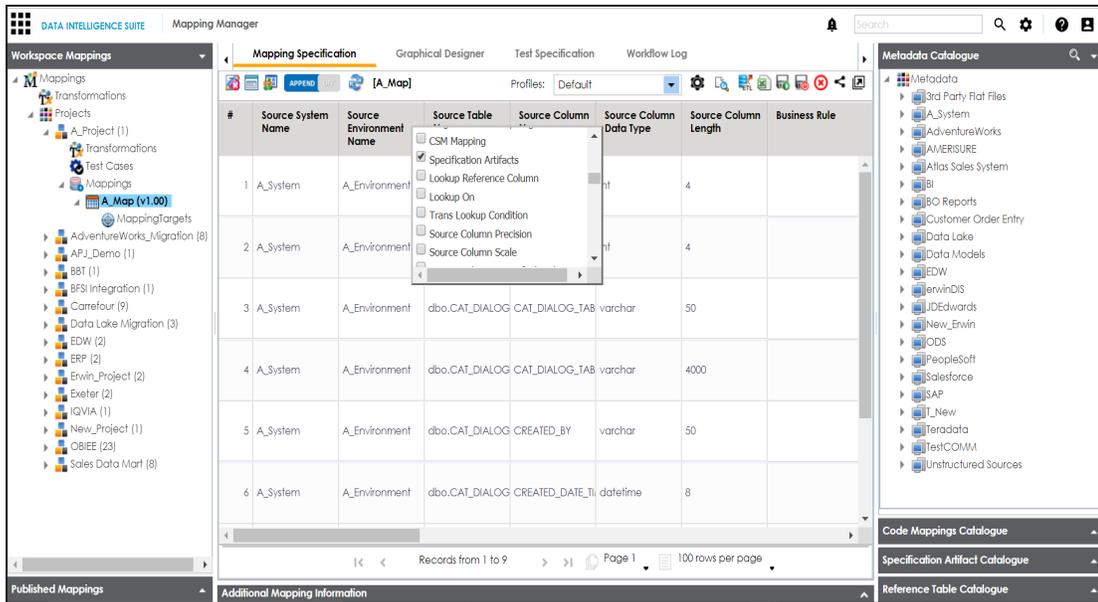
1. Go to **Application Menu > Data Catalog > Mapping Manager**.
2. Click the required map.

The Mapping specification page appears.



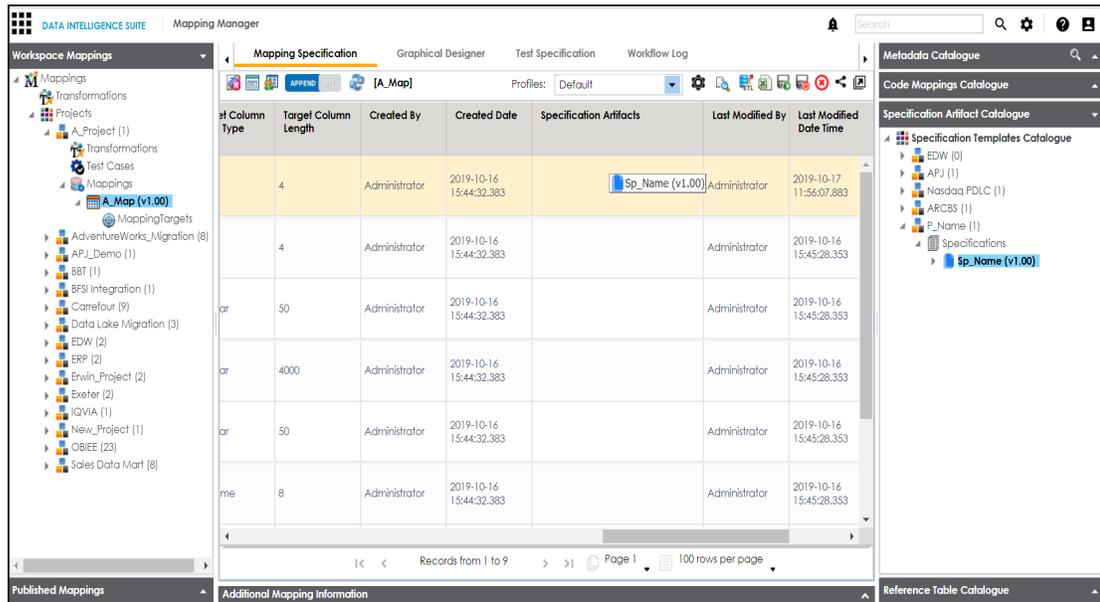
3. In **Mapping Specification**, right click the **Header Menu**.

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.

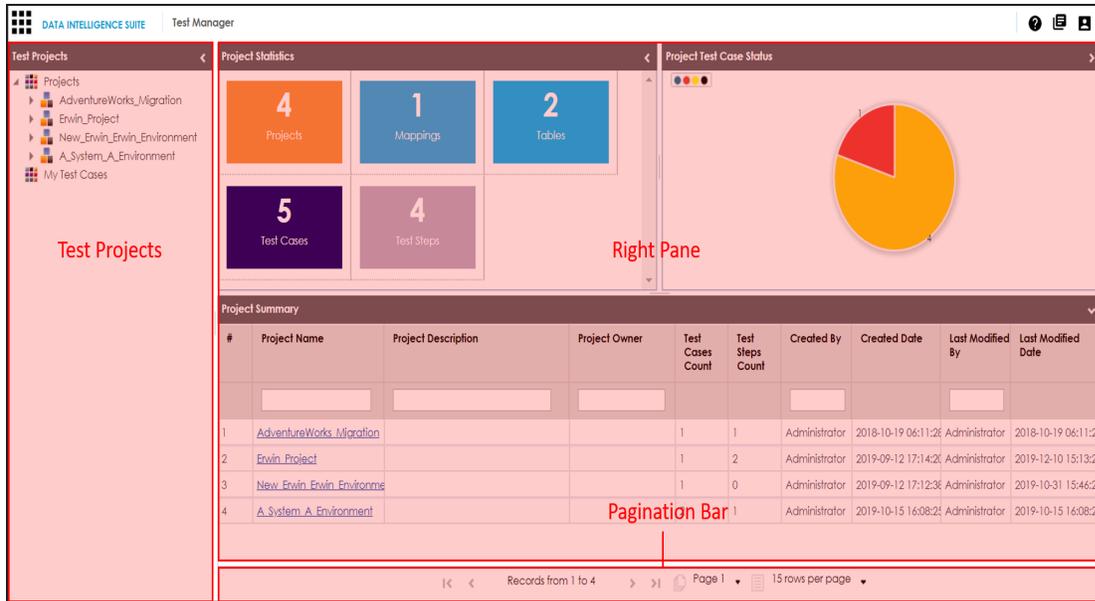


8. Click .

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		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.

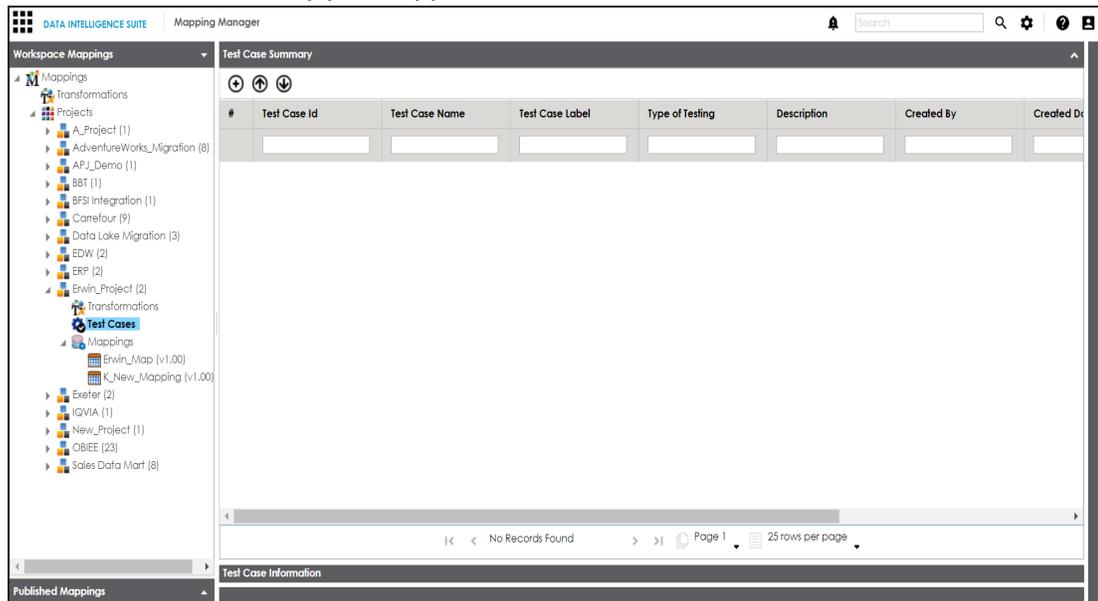
Creating Test Cases

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:

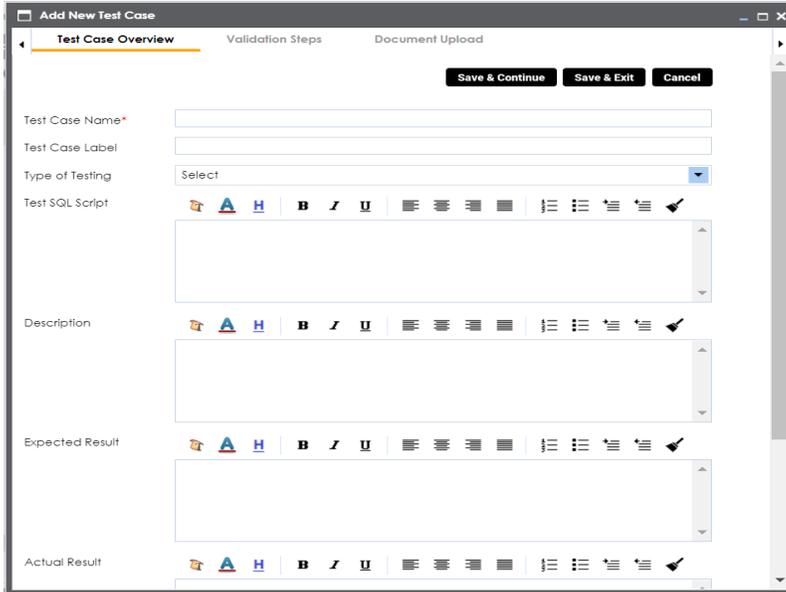
1. Go to **Application Menu > Data Catalog > Mapping Manager > Workspace Mappings**.
2. Under the **Workspace Mappings** pane, expand the required project node.
3. Click the **Test Cases** node.

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

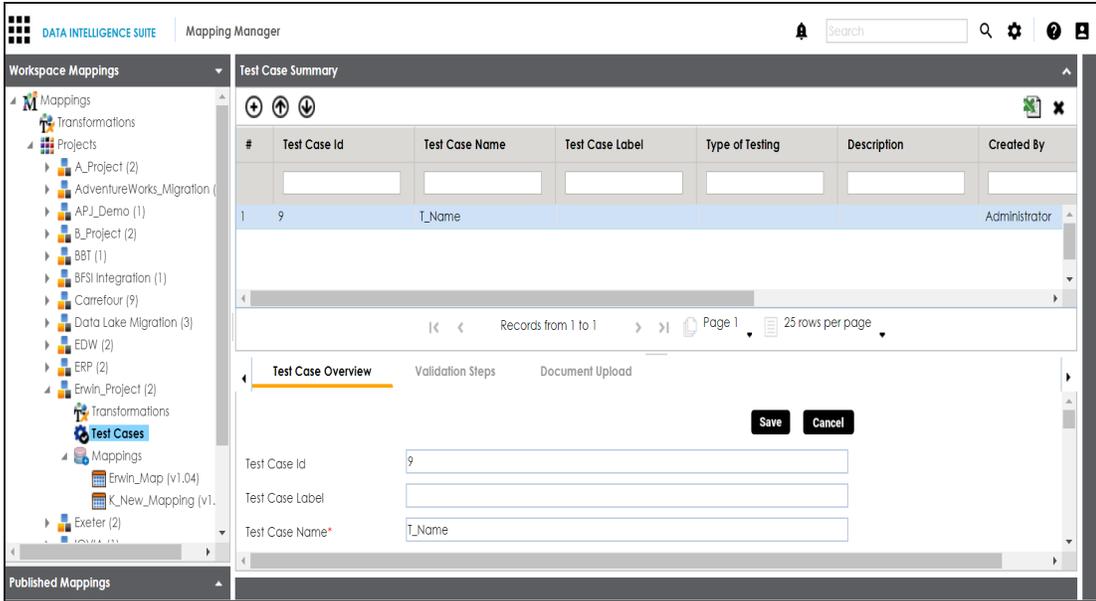
Adding Validation Steps

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:

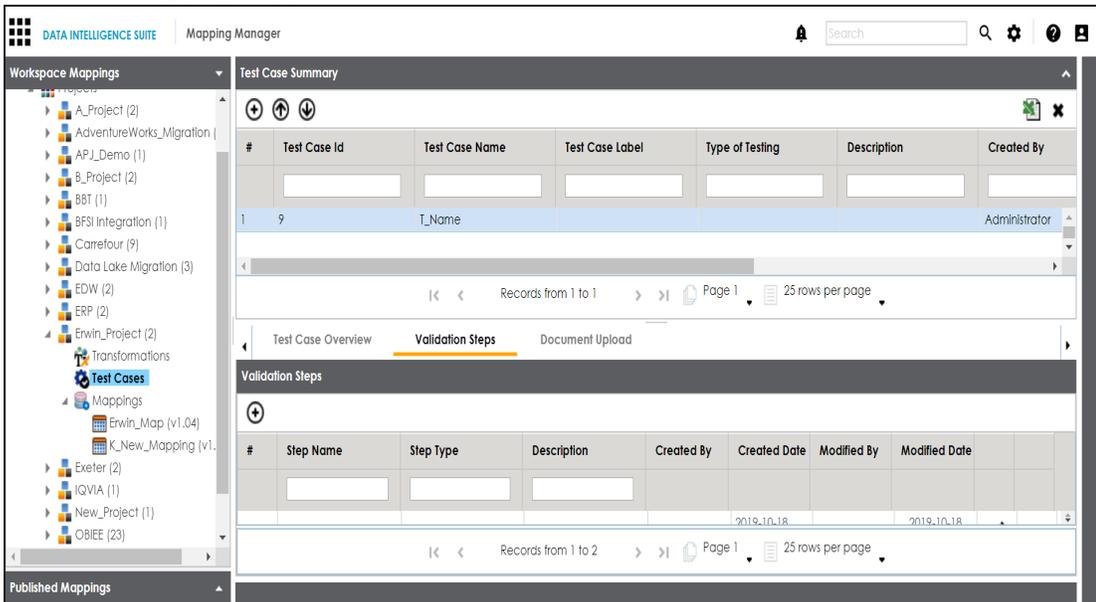
1. Under the **Workspace Mappings** pane, click the **Test Cases** node under the required project.

The Test Case Summary page appears.



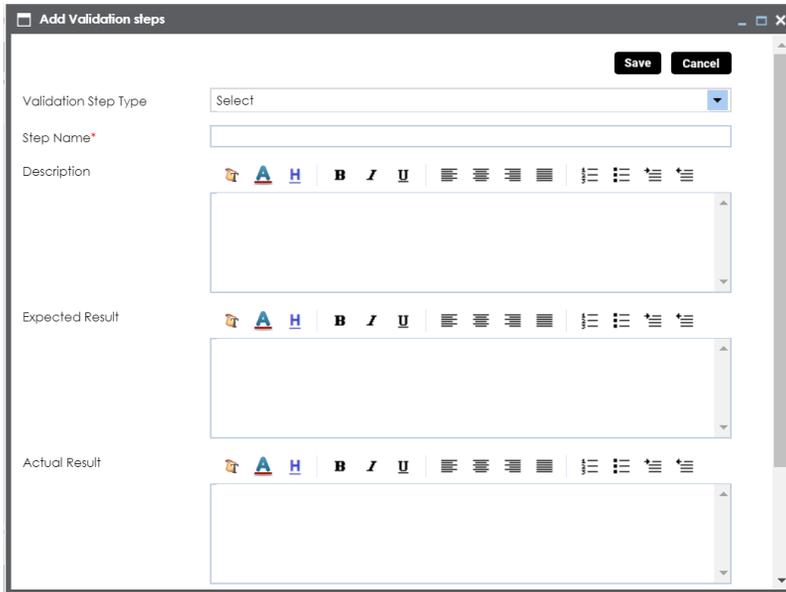
2. In the Bottom pane, click **Validation Steps**.

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

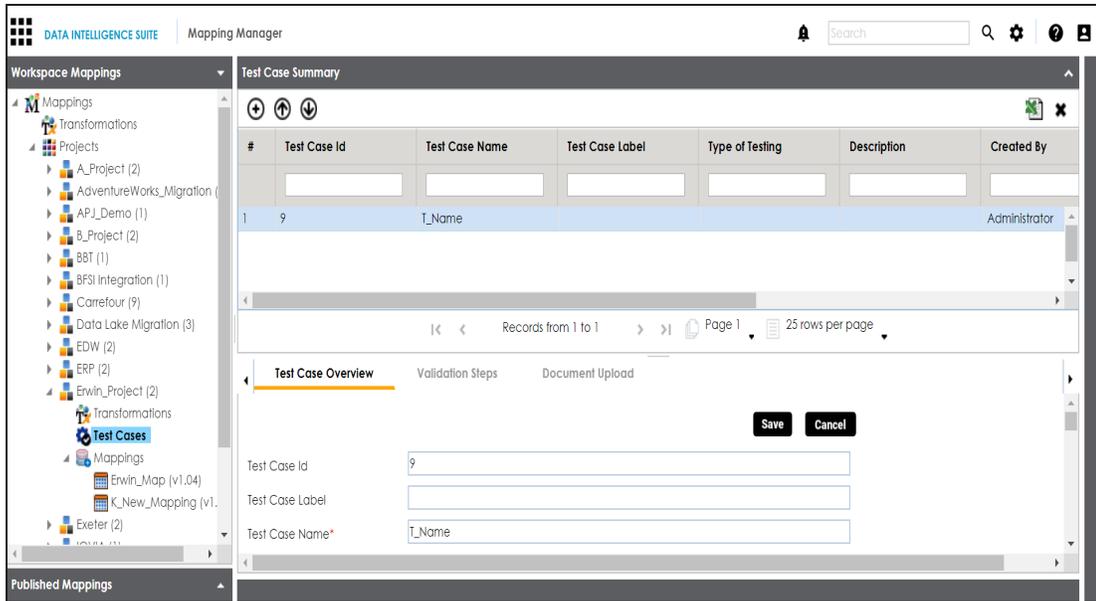
You can upload supporting documents to a project level test case and describe its intended use. You can also specify:

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

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

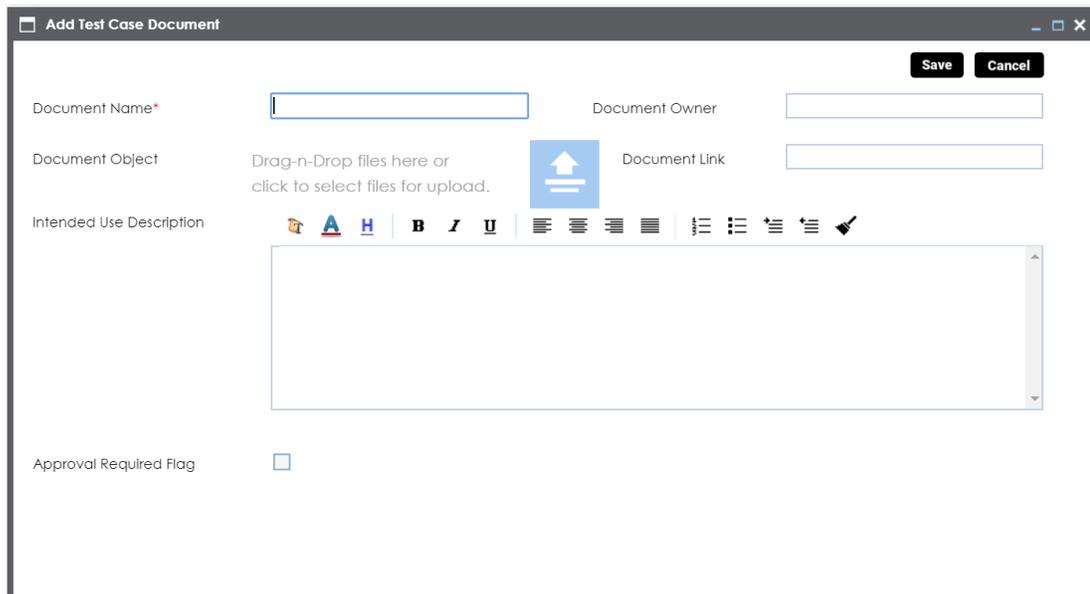
1. Under the **Workspace Mappings** pane, click the **Test Cases** node under the required project.

The Test Case Summary page appears.



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

The Add Test Case Document page appears.

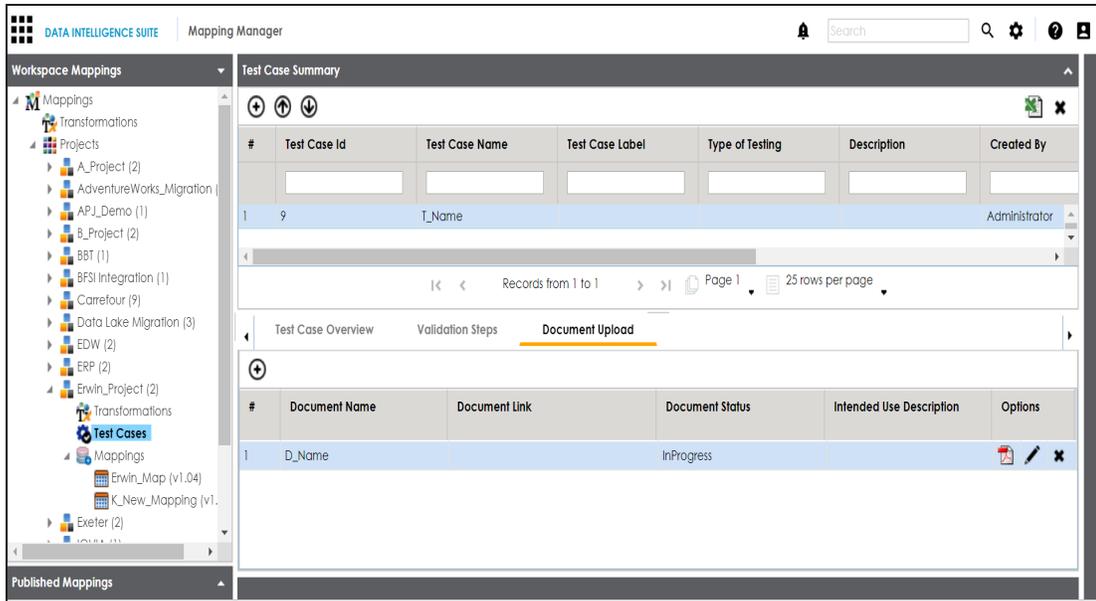


3. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

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/d/2sC2_SZlYeFKI7OOn-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 .

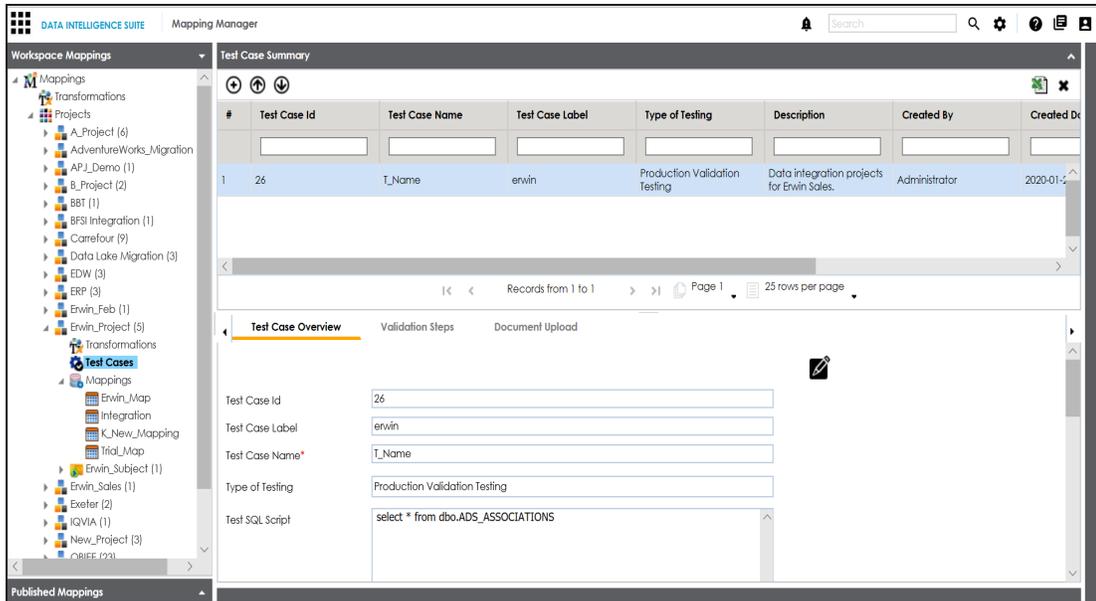
Managing Test Cases

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:

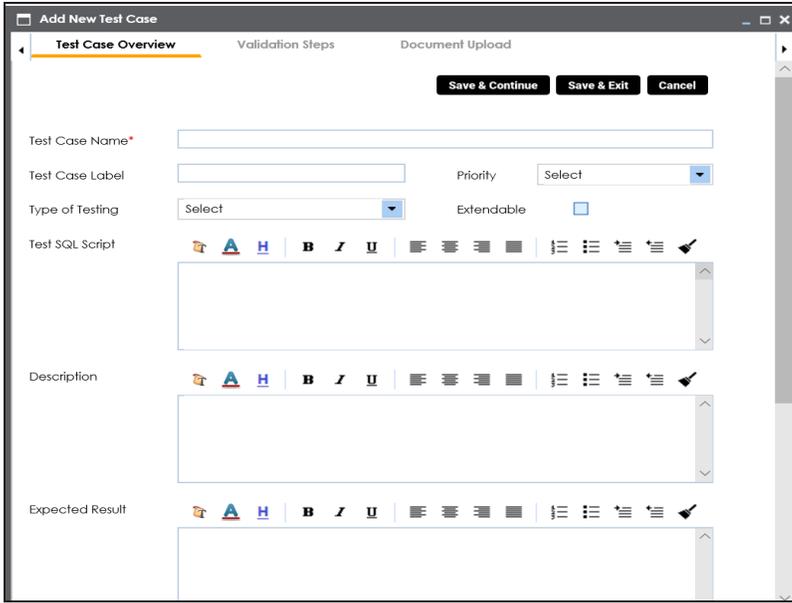
1. Go to **Application Menu > Data Catalog > Mapping Manager > Workspace Mappings**.
2. Click the required map and click the **Test Specification** tab.

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 project.

The screenshot displays the 'Mapping Manager' interface in the 'DATA INTELLIGENCE SUITE'. The 'Test Specification' tab is selected, showing a table of test cases. The table has columns for #, Test Case Id, Test Case Name, Test Case Label, Type of Testing, Description, Priority, Test Case Status, Approved, and Map. One test case is listed with ID '9' and name 'T_Name'. Below the table, the 'Test Case Overview' tab is active, showing input fields for 'Test Case Id' (9), 'Test Case Name' (T_Name), and 'Test Case Label'.

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 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. 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.
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

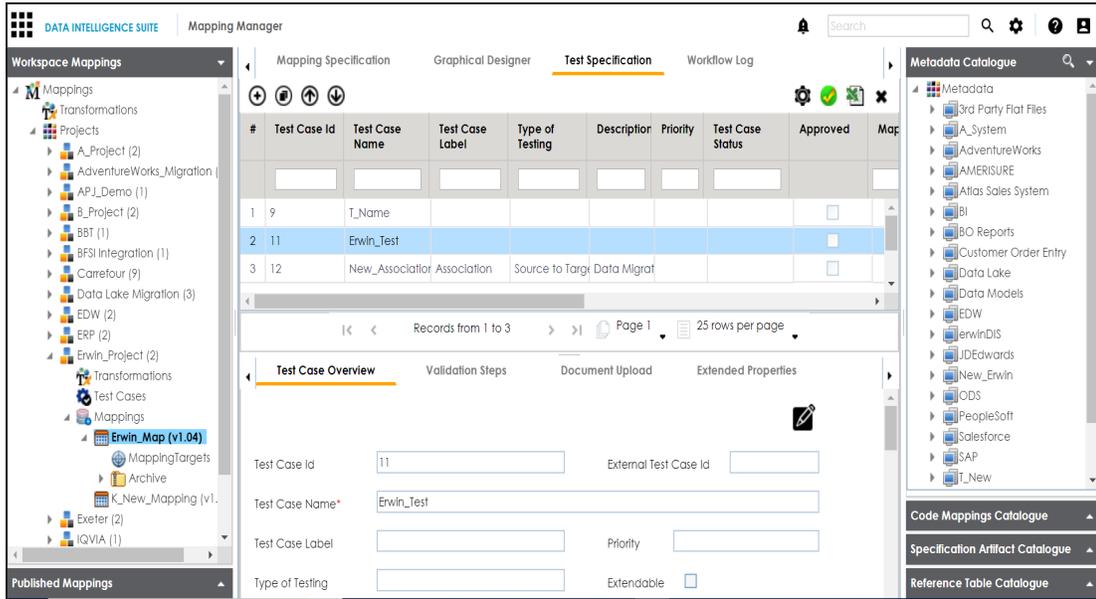
Adding Validation Steps

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:

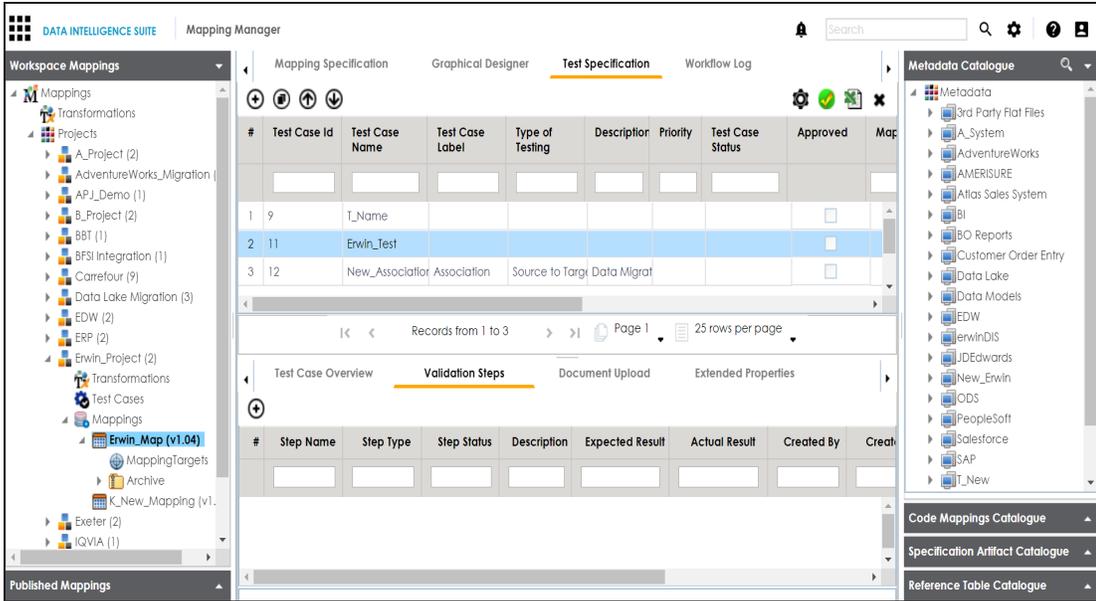
1. Under the **Workspace Mappings** pane, click the required map and click the **Test Specification** tab.
2. Double-click the required map level test case.

The Test Case Overview tab appears.



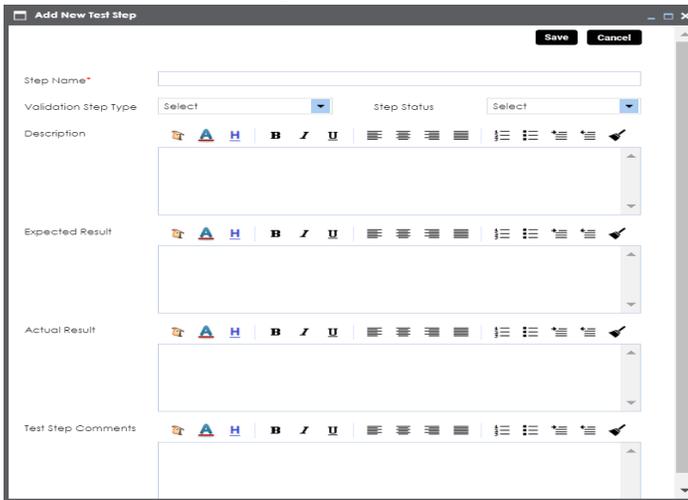
3. Click the **Validation Steps** tab.

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.

The screenshot displays the 'Mapping Manager' application interface. The 'Test Specification' tab is active, showing a table of test cases. The 'Erwin_Test' case (ID 11) is selected. Below the table, the 'Test Case Overview' tab is active, showing a form with the following fields:

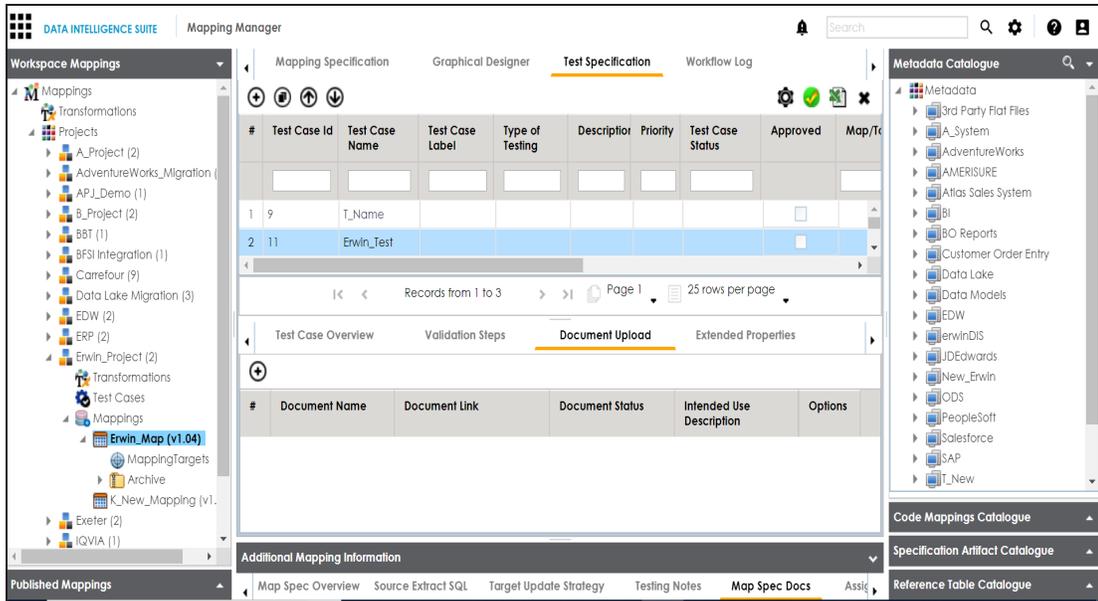
#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Descriptor	Priority	Test Case Status	Approved	Map
1	9	T_Name						<input type="checkbox"/>	
2	11	Erwin_Test						<input type="checkbox"/>	
3	12	New_Association	Association	Source to Target	Data Migrat			<input type="checkbox"/>	

The 'Test Case Overview' form contains the following fields:

- Test Case Id: 11
- External Test Case Id: (empty)
- Test Case Name: Erwin_Test
- Test Case Label: (empty)
- Priority: (empty)
- Type of Testing: (empty)
- Extendable:

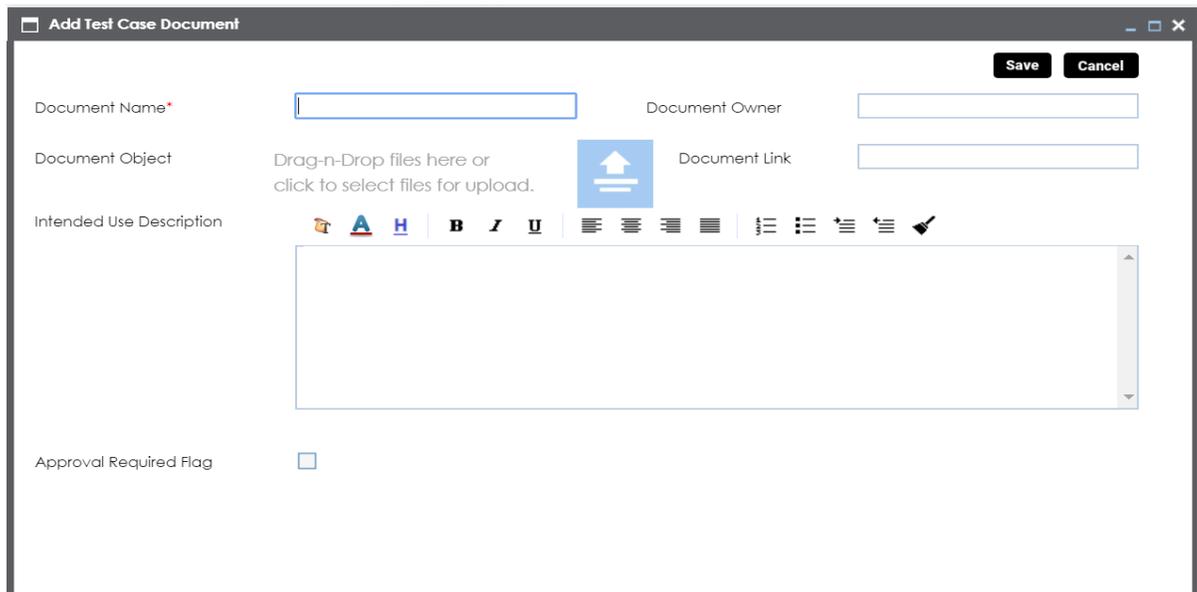
3. Click the **Document Upload** tab.

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/d/2sC2_SZlYeFKI7OOn-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

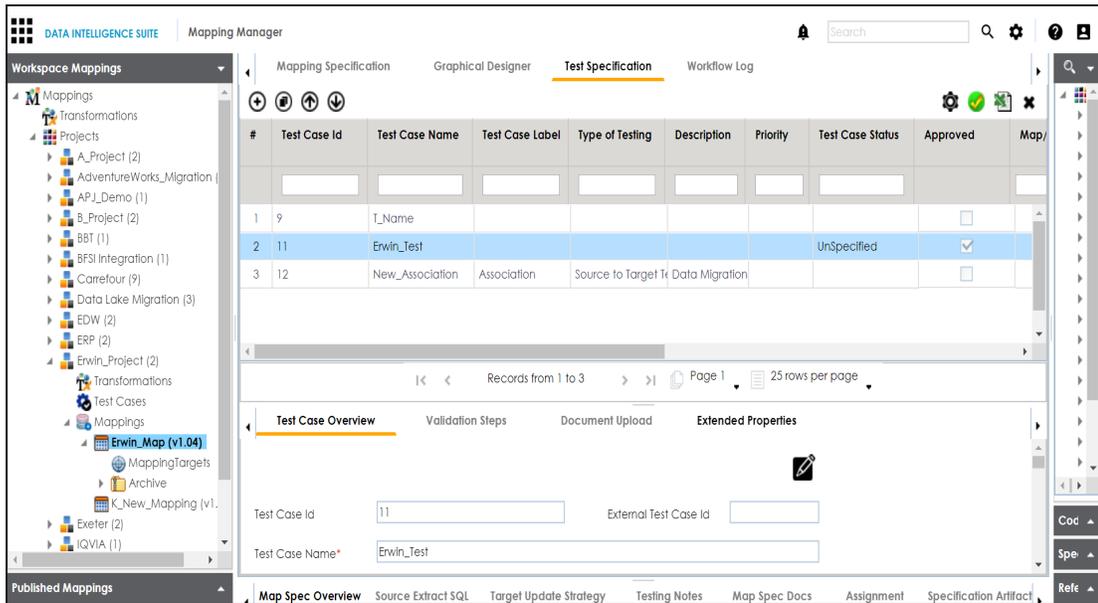
Managing test cases involves:

- Updating test case status
- Approving test cases

- Exporting test cases
- Deleting test cases

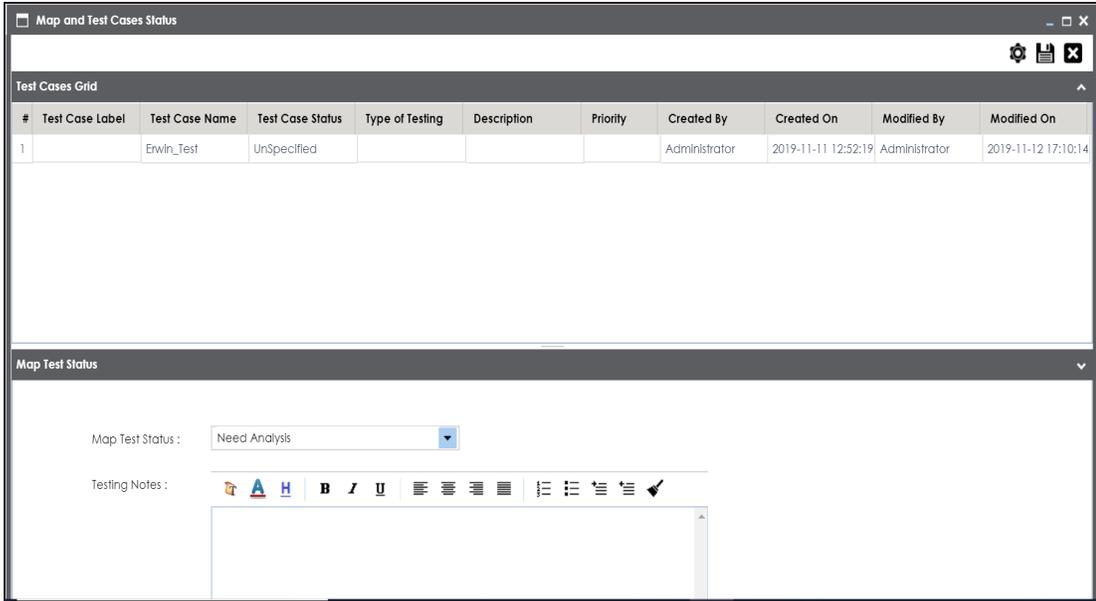
To update test case status, follow these steps:

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



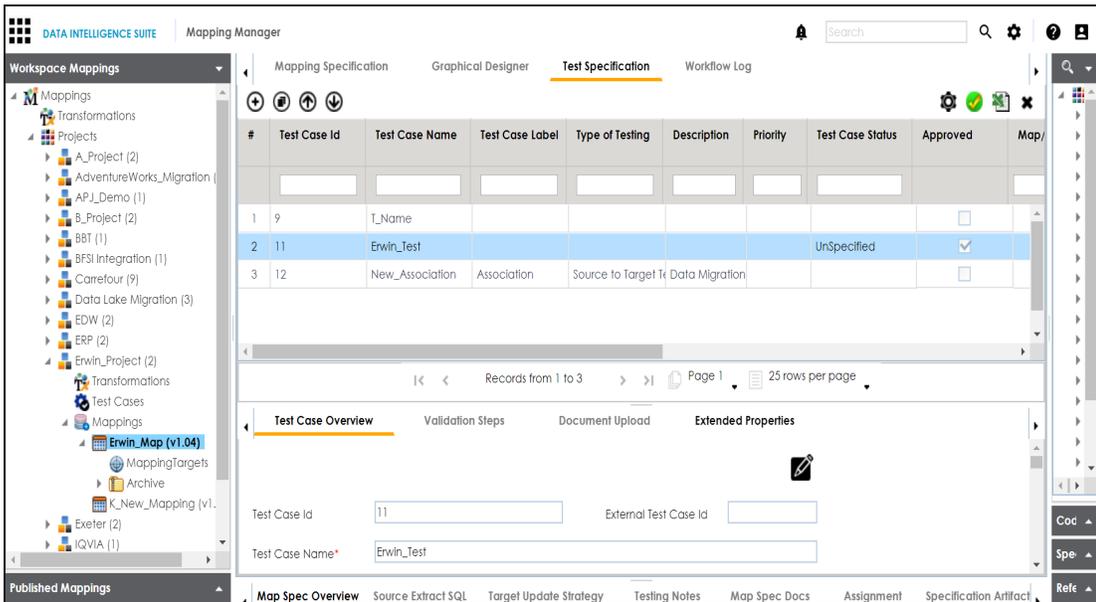
2. Click .

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.

#	Test Case Label	Test Case Name	Test Case Status	Approved	Type of Testing	Description	Priority	Created By	Create
1		Erwin_Test		<input type="checkbox"/>				Administrator	2019-11

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>.

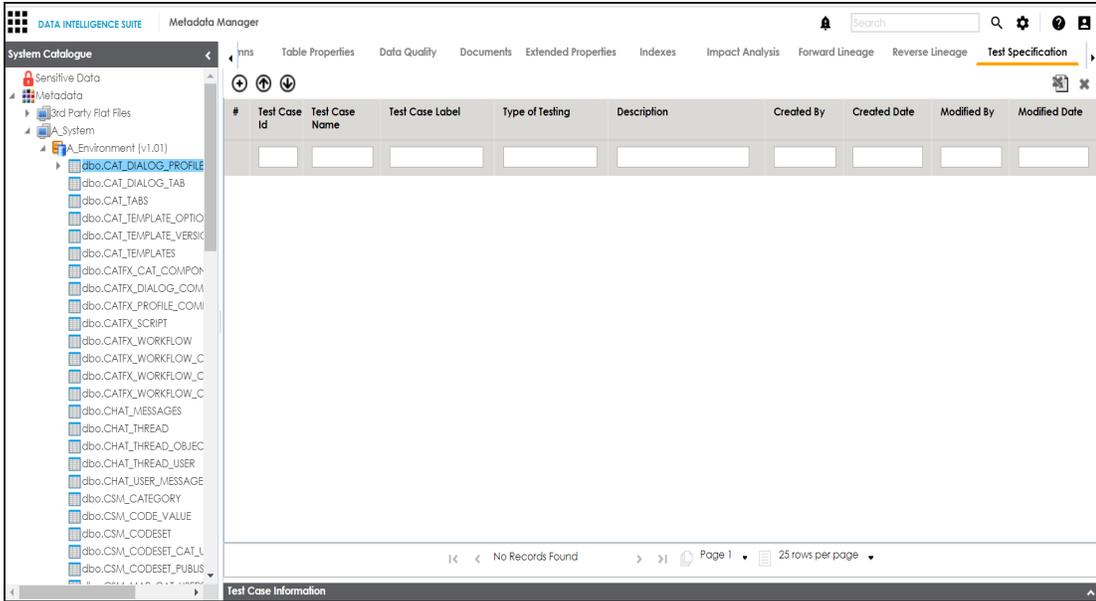
Creating Test Cases

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:

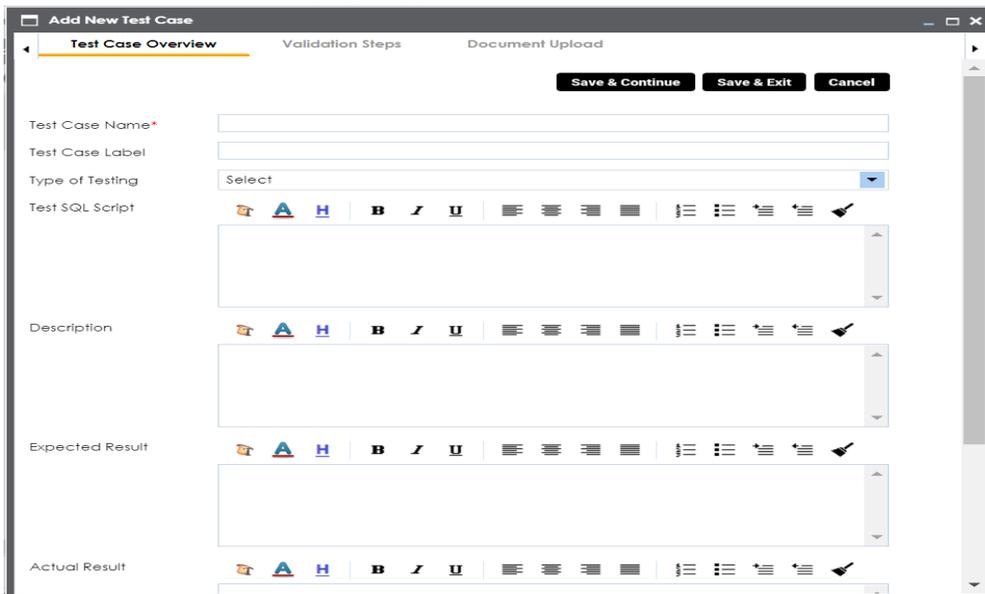
1. Go to **Application Menu > Data Catalog > Metadata Manager**.
2. Under the **System Catalogue** pane, click the required table.
3. Click the **Test Specification** tab.

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.

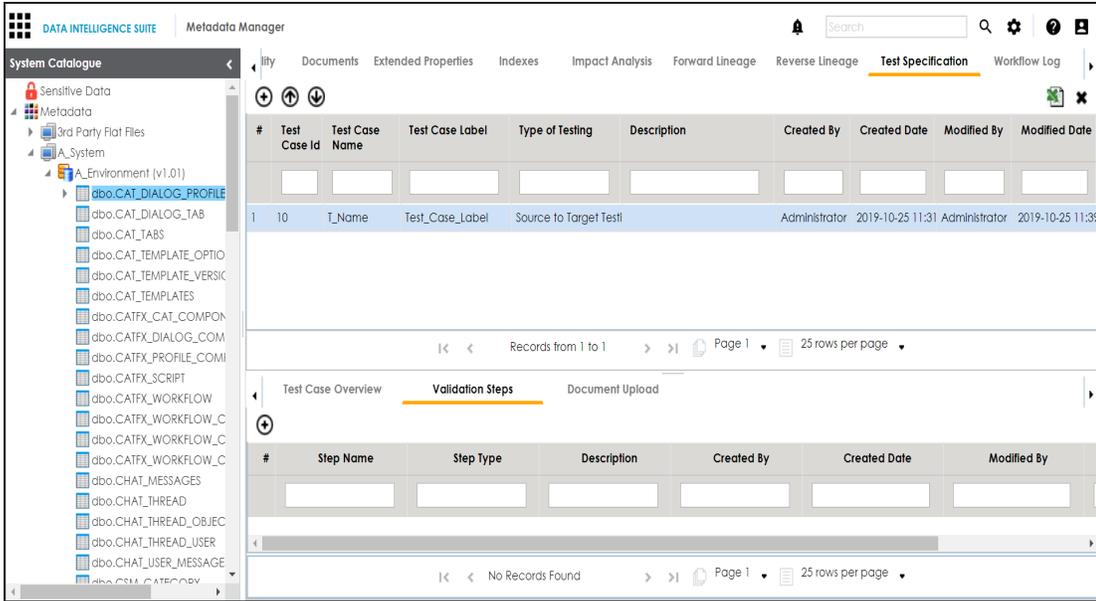
The screenshot shows the 'Metadata Manager' interface. On the left is the 'System Catalogue' tree with 'dbo.CAT_DIALOG_PROFILE' selected. The main area displays a table of test cases:

#	Test Case Id	Test Case Name	Test Case Label	Type of Testing	Description	Created By	Created Date	Modified By	Modified Date
1	10	T_Name	Test_Case_Label	Source to Target Testi		Administrator	2019-10-25 11:31	Administrator	2019-10-25 11:35

Below the table is a 'Test Case Overview' form with the following fields:

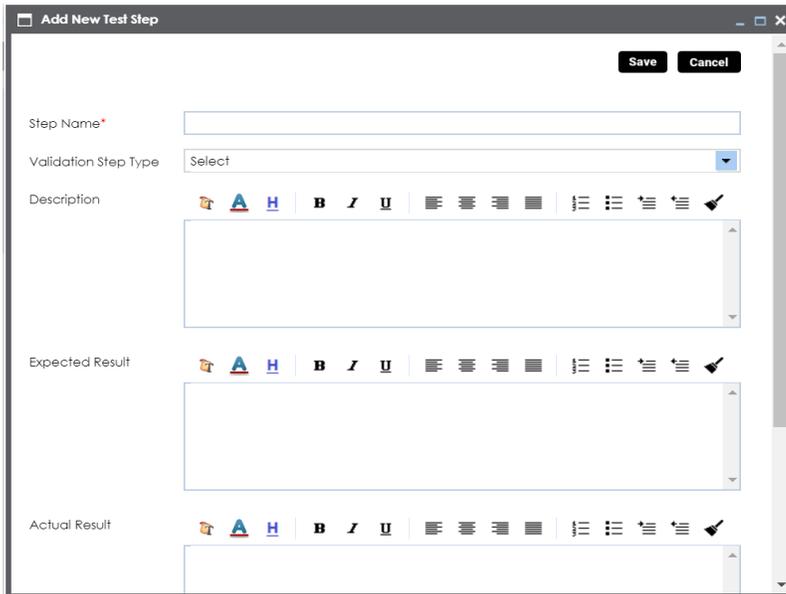
- Test Case Id: 10
- Test Case Name*: T_Name
- Test Case Label: Test_Case_Label
- Type of Testing: Source to Target Testing

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

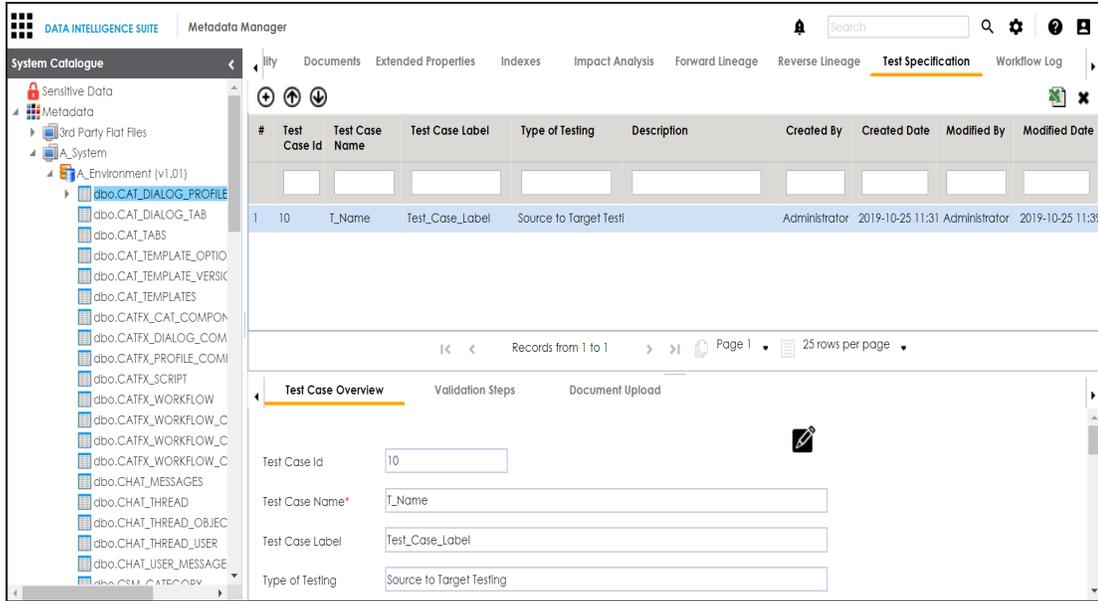
You can upload supporting documents to a metadata level test case and describe its intended use. You can also specify:

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

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

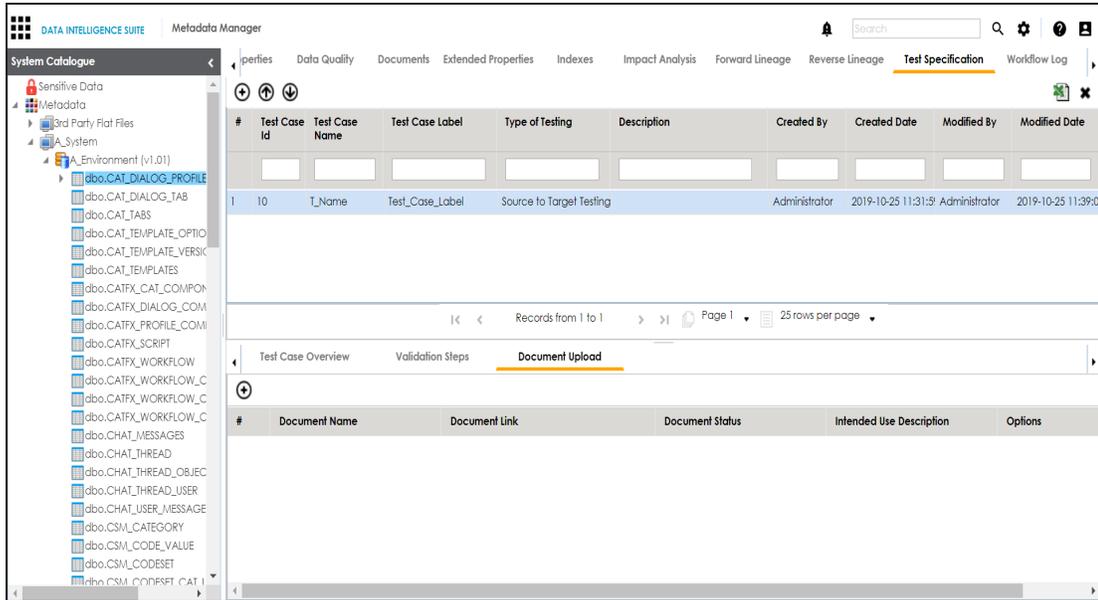
1. Under the **System Catalogue** pane, click the required table and click the **Test Specification** tab.

The Test Case Overview appears.



2. Click **Document Upload**.

The following page appears.



3. Click .

The Add Test Case Document page appears.

The screenshot shows a web form titled "Add Test Case Document". It contains the following elements:

- Document Name***: A text input field with a red asterisk indicating it is mandatory.
- Document Object**: A text input field with a "Drag-n-Drop files here or click to select files for upload." instruction and a blue upload icon.
- Document Owner**: A text input field.
- Document Link**: A text input field.
- Intended Use Description**: A rich text editor with a toolbar containing icons for text color, bold, italic, underline, bulleted list, numbered list, indent, and undo.
- Approval Required Flag**: A checkbox.
- Buttons**: "Save" and "Cancel" buttons in the top right corner.

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/d/2sC2_SZlYeFKI70On-b5YkMBq4ptA7jhG5/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.

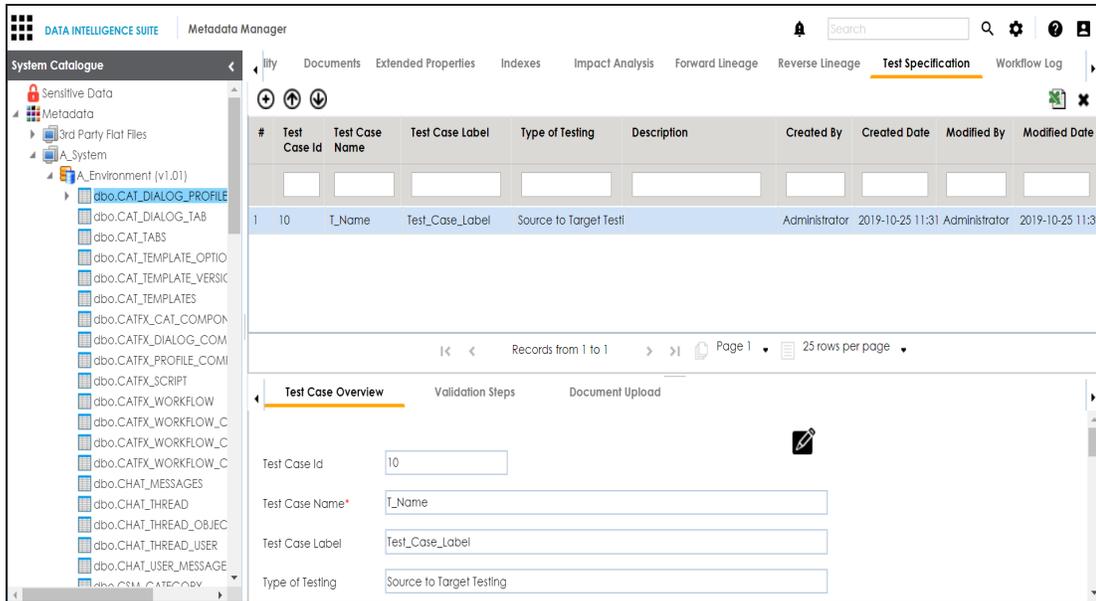
Managing Test Cases

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 .

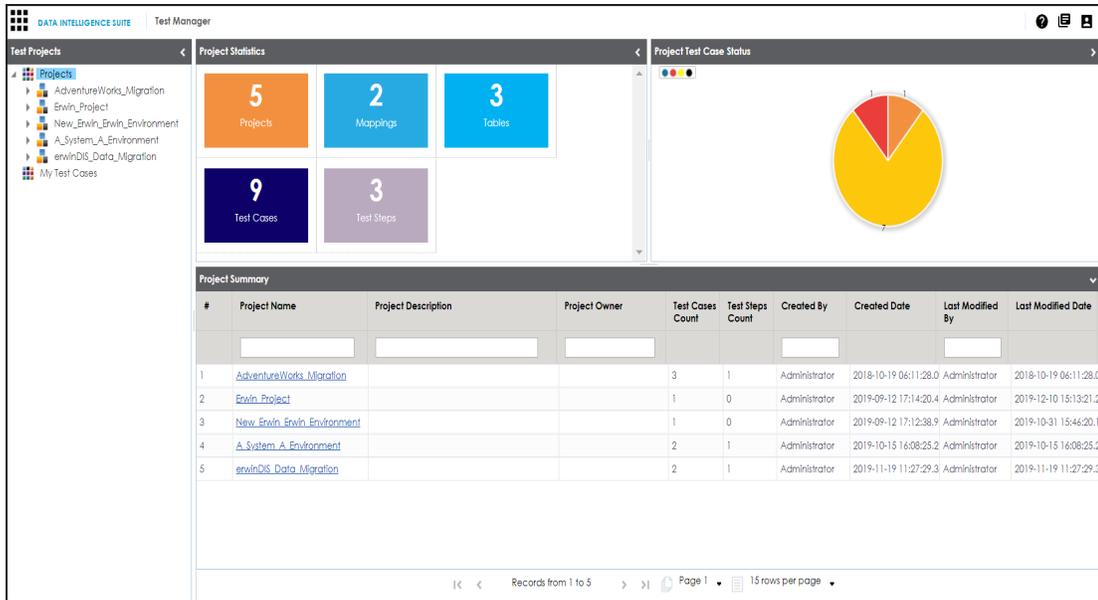
The test case is deleted.

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.

The screenshot shows the Test Manager interface for the project 'erwinDIS_Data_Migration'. The left pane shows a tree view of projects, with 'erwinDIS_Data_Migration' selected. The middle pane displays 'Test Case Statistics' with three cards: '1 Tables', '2 Test Cases', and '1 Test Steps'. The right pane shows 'Test Case Status' with a yellow circular gauge. Below these is a 'Test Case Summary' table with the following data:

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

At the bottom, there is a pagination bar showing 'Records from 1 to 2', 'Page 1', and '15 rows per page'.

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

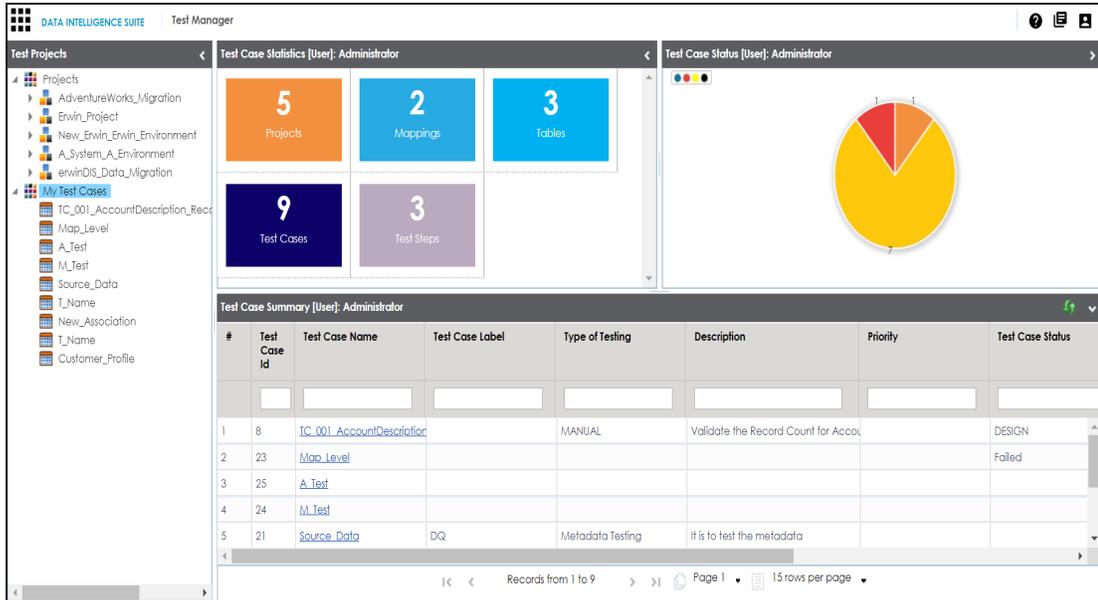
3. Click the test case to view its details.

You can see the **Test Case Overview**.

The screenshot shows the 'Test Case Overview' for the test case 'Source_Data'. The left pane shows the project tree with 'Source_Data' selected. The main area displays the following details:

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

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	<p>Use this pane to browse through different views and a Miscellaneous tab. There are three different views:</p> <ul style="list-style-type: none"> ▪ Calendar View: Select this view to list the releases on a calendar. ▪ Project View: Select this view to list the releases under a project. ▪ Release View: Select this view to list release object details under a release.
Bottom Pane	<p>Use this pane to view or work on the data displayed based on your selection in the browser pane.</p>

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.

The screenshot displays the Release Manager interface with the following components:

- Project Listing Table:**

#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
1	EDW	Kartik Sridhar	11/28/2019	4	6	Administrator	10/18/2018		[Edit] [Download] [Delete] [Refresh]
2	New_Project	Resource_Name	10/17/2019	2	1	Administrator	09/11/2019		[Edit] [Download] [Delete] [Refresh]
- Release Listing for: EDW Table:**

#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Create Date	Last Modified Date	Options
1	March 31 2019 Hoffix	03/30/2019	ks123		PENDING APPROVAL	Administrator	03/13/2019		[Edit] [Download] [Delete] [Refresh]
2	Pfizer Test	01/31/2019	janedoe		PENDING APPROVAL	Administrator	01/23/2019		[Edit] [Download] [Delete] [Refresh]
3	Release_New	11/28/2019			PENDING APPROVAL	Administrator	11/28/2019		[Edit] [Download] [Delete] [Refresh]
4	Test	10/24/2018			PENDING APPROVAL	Administrator	10/24/2018		[Edit] [Download] [Delete] [Refresh]
- Project Details Panel (EDW):**
 - Description:
 - Resource Name: Kartik Sridhar
 - Resource Email:
- Release Summary - By Status:**
 - 100% PENDING APPROVAL
- Release Summary - By Owner:**
 - 50% Unassigned
 - 25% ks123
 - 25% janedoe

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.

The screenshot shows the 'Release Manager' interface. At the top, there are navigation tabs: 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the tabs is a 'Project Listing' table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table contains three rows of data. Below the project listing is a 'Release Listing for: Project_Name' section, which is currently empty. The right sidebar shows 'Project Details' for the selected project, including fields for Description, Resource Name, and Resource Email. Below that is a 'Release Summary - By Status' section showing 'NO DATA FOUND'.

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

#	Release Name	Release Date	Release Owner	Change Control #	Release Status	Created By	Create Date	Last Modified Date	Options

2. Click **Add Release**.

The New Release page appears.

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.

The screenshot displays the Release Manager interface. At the top, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the tabs is a search bar and utility icons. The main area is divided into two sections: 'Project Listing' and 'Release Listing for: Project_Name'. The 'Project Listing' table has columns for #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The 'Release Listing' table has columns for #, Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. On the right side, there are two panels: 'Project Details' showing 'Project_Name' with description, resource name, and email; and 'Release Summary - By Status' showing a 100% 'PENDING APPROVAL' status. Below that is another 'Release Summary - By Owner' panel showing 'Unassigned' status.

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.

DATA INTELLIGENCE SUITE Release Manager

Calendar View **Project View** Release View Miscellaneous

Project Listing: Add Project Export to Excel Share

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

Project Details

Project_Name

Description:

Resource Name: Joe Villers

Resource Email:

Release Summary - By Status

Release Summary - By Owner

Release Listing for : Project_Name Add Release Generate Release Plan Export to Excel

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

Records from 1 to 1 Page 1 10 rows per page

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.

Migration Object Entry Form

Select Object Types : Add Miscellaneous Objects Save Cancel

Object Name:*

Object Description:

Object Type: DDL Script

Choose File: Choose File No file chosen

Live Date / Time:* 11/29/2019 HH:MM AM/PM

Migration Date / Time:* 11/29/2019 HH:MM AM/PM

Migration From: DEV

DSN:

IP Address:

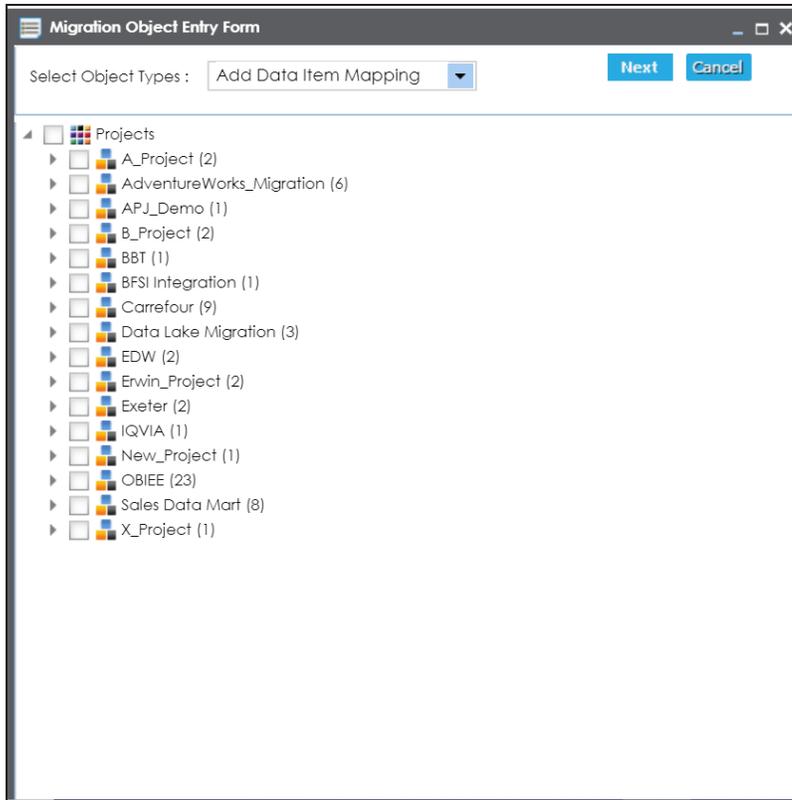
Migration To: DEV

DSN:

IP Address:

Owner/Assignee -Select-

4. In **Select Object Types**, select **Add 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 Dat-warehouse project.
Live Date / Time	Specifies the live date and time of the release object. For example, 04/03/2020 9:30 AM. Live Date is autopopulated and it is same as the release date. Enter the Live Time in HH : MM format.
Migration	Specifies the migration date and time of the release object from the DEV

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

7. Click **Save**.

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

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

8. Use the following options:

Edit (✎)

To edit the release object, click ✎.

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

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

Information (i)

To view the mapping information, click i.

Download (↓)

To download the release object details, click ↓.

Email (✉)

To send email notification about the release object click ✉.

Delete (✕)

To delete the release object, click ✕.

Promoting Data Item Mappings

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

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

To promote data item mappings, follow these steps:

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

The release listing of the project appears.

The screenshot shows the Release Manager interface. The top navigation bar includes 'DATA INTELLIGENCE SUITE' and 'Release Manager'. The main area is divided into tabs: 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. The 'Project Listing' table has the following data:

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

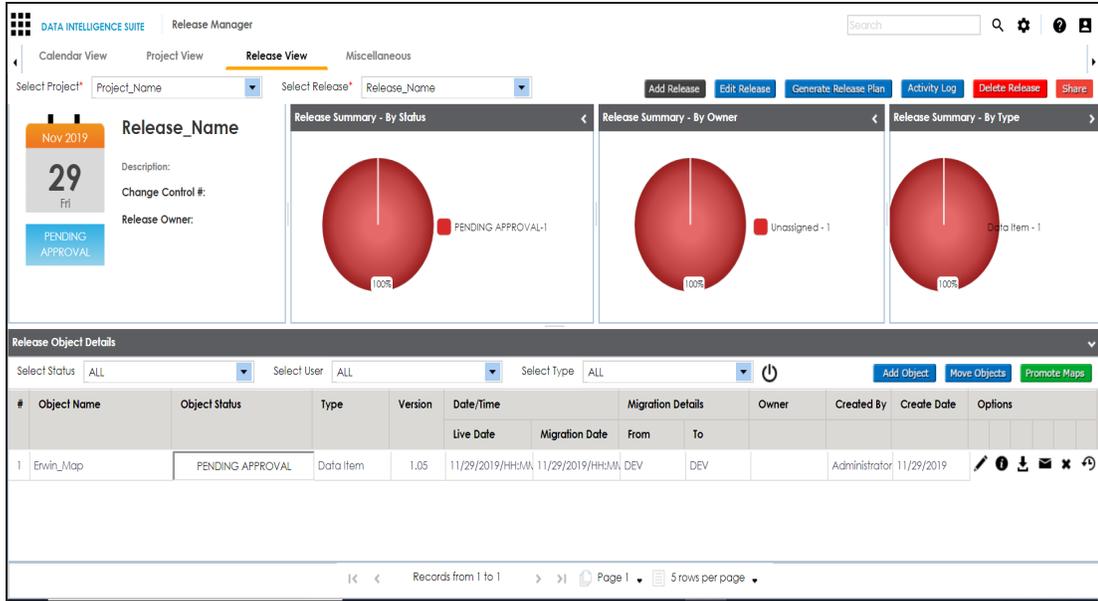
Below the project listing, the 'Release Listing for: Project_Name' table shows:

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

On the right side, the 'Project Details' panel shows 'Project_Name' with fields for Description, Resource Name (Joe Villers), and Resource Email. Below it, two pie charts are displayed: 'Release Summary - By Status' showing 100% PENDING APPROVAL, and 'Release Summary - By Owner' showing 100% Unassigned.

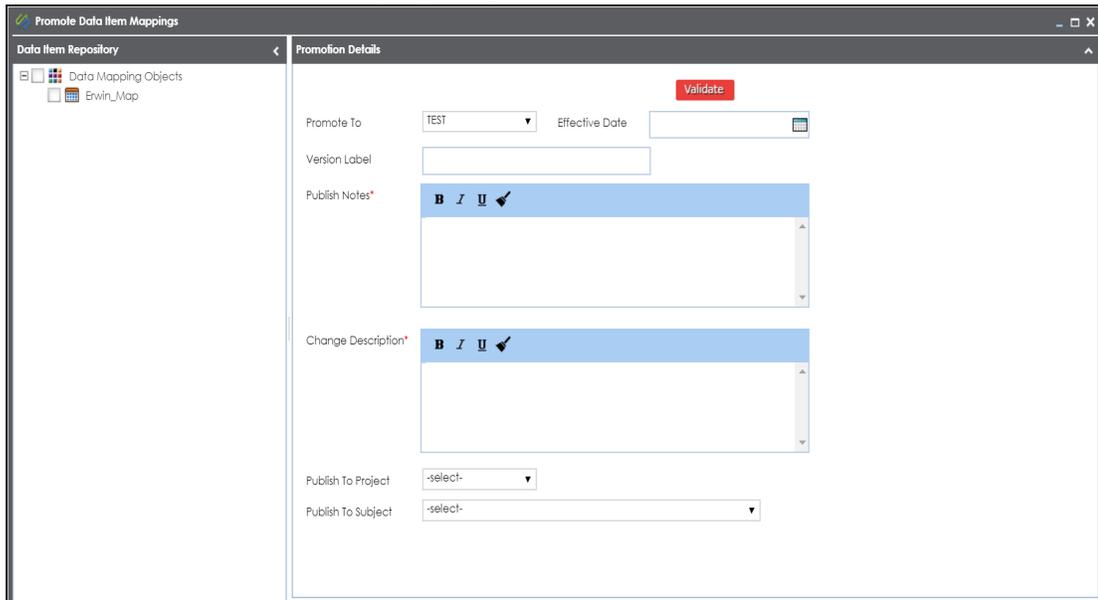
2. Click the required <Release_Name>.

The Release View 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.



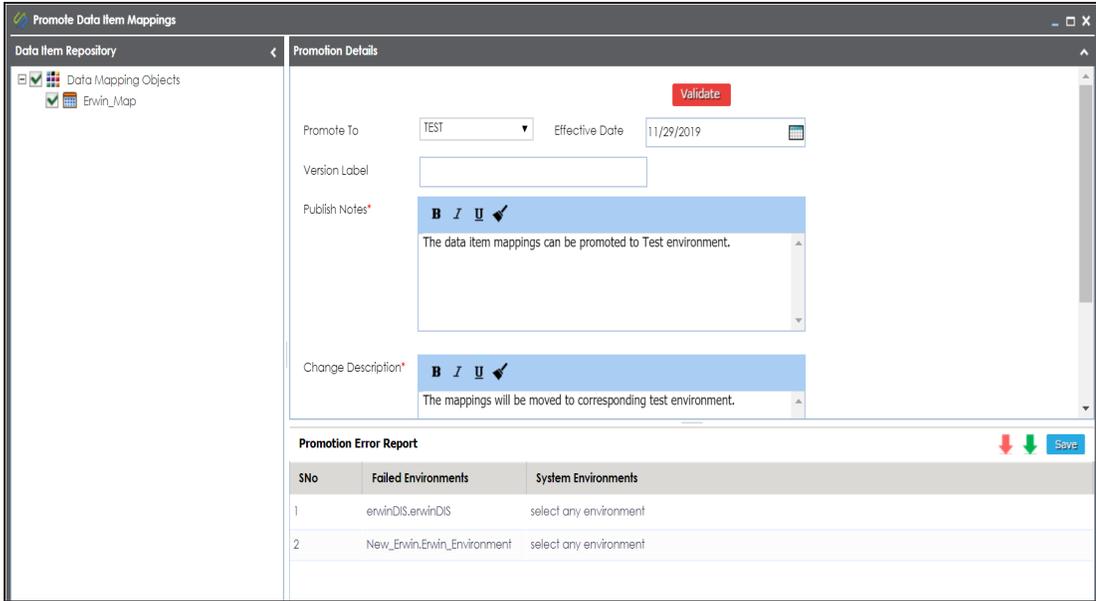
4. In **Data Item Repository**, select the required <Map_Name> check box.

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.

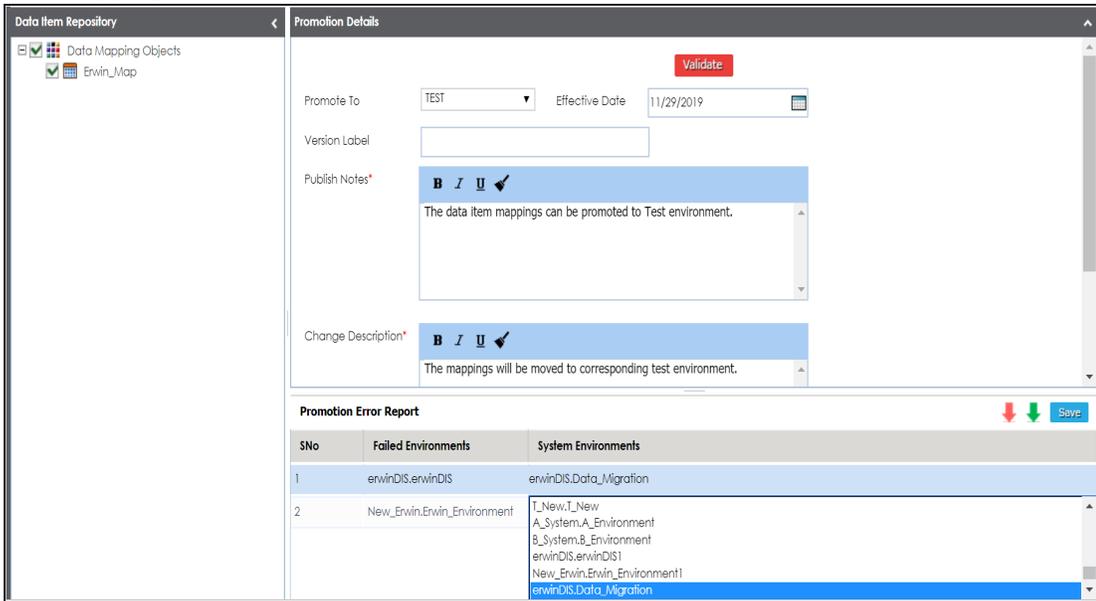
Field Name	Description
Promote To	Specifies the release environment to which the release object is being promoted. For example, TEST. Select the release environment where you wish to promote the release object (data item mapping).
Effective Date	Specifies the effective migration date of the release object. 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.

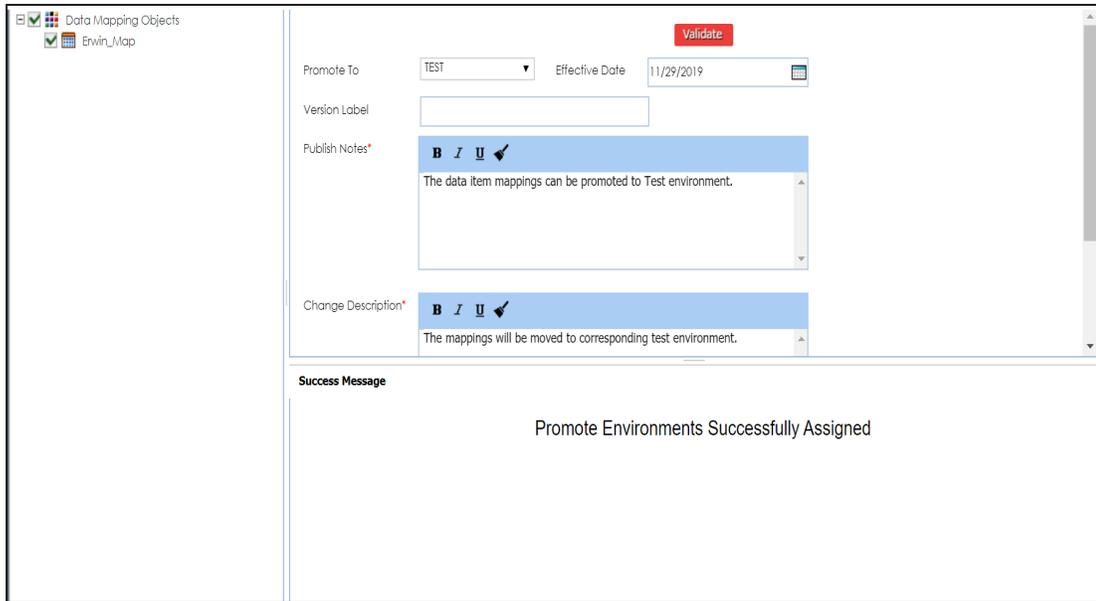


7. Double-click the corresponding cells to select the promote system environment for the mappings.



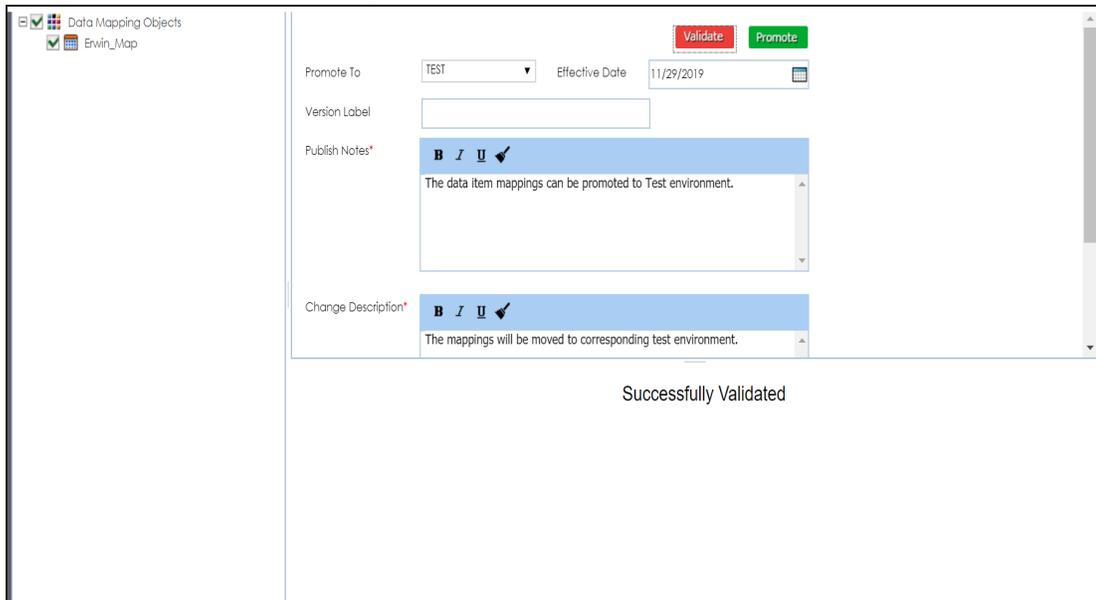
8. Click **Save**.

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.

The screenshot displays the Release Manager interface. The top navigation bar includes 'DATA INTELLIGENCE SUITE', 'Release Manager', and a search bar. Below the navigation, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. The main content area is divided into two sections:

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

#	Project Name	Owner	Last Activity On	# of Releases	# of Release Objects	Created By	Create Date	Last Modified Date	Options
1	EDW	Kartik Sridhar	11/29/2019	4	6	Administrator	10/18/2018		[Edit] [Download] [Delete] [Refresh]
2	New_Project	Resource_Name	10/17/2019	2	1	Administrator	09/11/2019		[Edit] [Download] [Delete] [Refresh]
3	Project_Name	Joe Villers	11/28/2019	1	0	Administrator	11/28/2019		[Edit] [Download] [Delete] [Refresh]
- Release Listing for: Project_Name:** A table with columns: #, Release Name, Release Date, Release Owner, Change Control #, Release Status, Created By, Create Date, Last Modified Date, and Options. The table contains one row:

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

On the right side, there are two summary charts:

- Release Summary - By Status:** A pie chart showing 100% PENDING APPROVAL.
- Release Summary - By Owner:** A pie chart showing 100% Unassigned.

At the bottom, there is a pagination bar showing 'Records from 1 to 1', 'Page 1', and '10 rows per page'.

2. Click the required <Release_Name>.

The Release View page appears.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

Migration Object Entry Form

Select Object Types : Add Miscellaneous Objects Save Cancel

Object Name:*

Object Description:

Object Type: DDL Script

Choose File: Choose File No file chosen

Live Date / Time:* 11/29/2019 HH:MM AM/PM

Migration Date / Time:* 11/29/2019 HH:MM AM/PM

Migration From: DEV

DSN:

IP Address:

Migration To: DEV

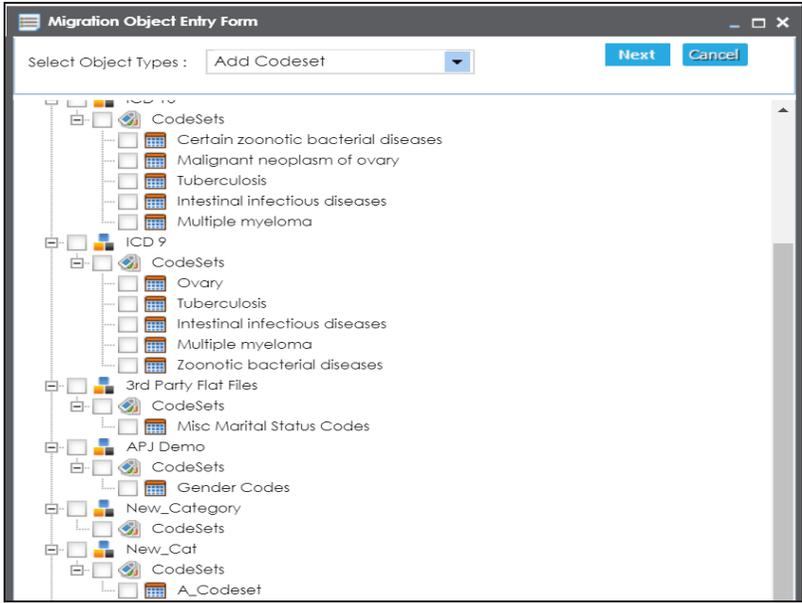
DSN:

IP Address:

Owner/Assignee -Select-

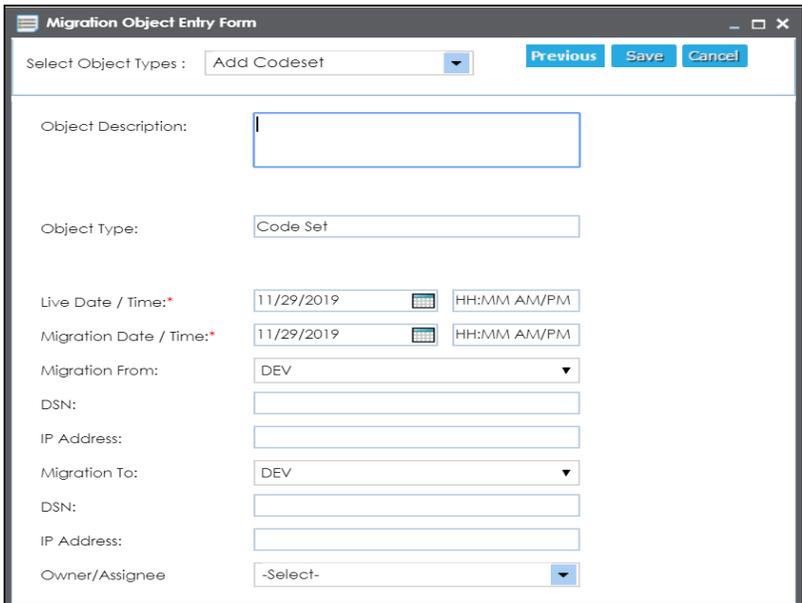
4. In **Select Object Types**, select **Add Codeset**.

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

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.

The screenshot shows the Release Manager interface. At the top, there are navigation tabs: Calendar View, Project View, Release View (selected), and Miscellaneous. Below the tabs, there are dropdown menus for 'Select Project' and 'Select Release', and buttons for 'Add Release', 'Edit Release', 'Generate Release Plan', 'Activity Log', 'Delete Release', and 'Share'. The main content area is divided into three summary charts: 'Release Summary - By Status' (showing 'PENDING APPROVAL-4'), 'Release Summary - By Owner' (showing 'Unsigned - 4'), and 'Release Summary - By Type' (showing 'Code Set - 1', 'Data Item - 2', and 'DDL Script - 1'). Below the charts is the 'Release Object Details' section, which includes dropdowns for 'Select Status' (set to 'ALL'), 'Select User' (set to 'ALL'), and 'Select Type' (set to 'ALL'). There are also buttons for 'Add Object', 'Move Objects', and 'Promote Maps'. The main part of the screenshot is a table with the following data:

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

At the bottom of the table, there is a pagination bar showing 'Records from 1 to 4', 'Page 1', and '5 rows per page'.

8. Use the following options:

Edit (✎)

To edit the release object, click ✎.

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

Information (i)

To view the mapping information, click .

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 .

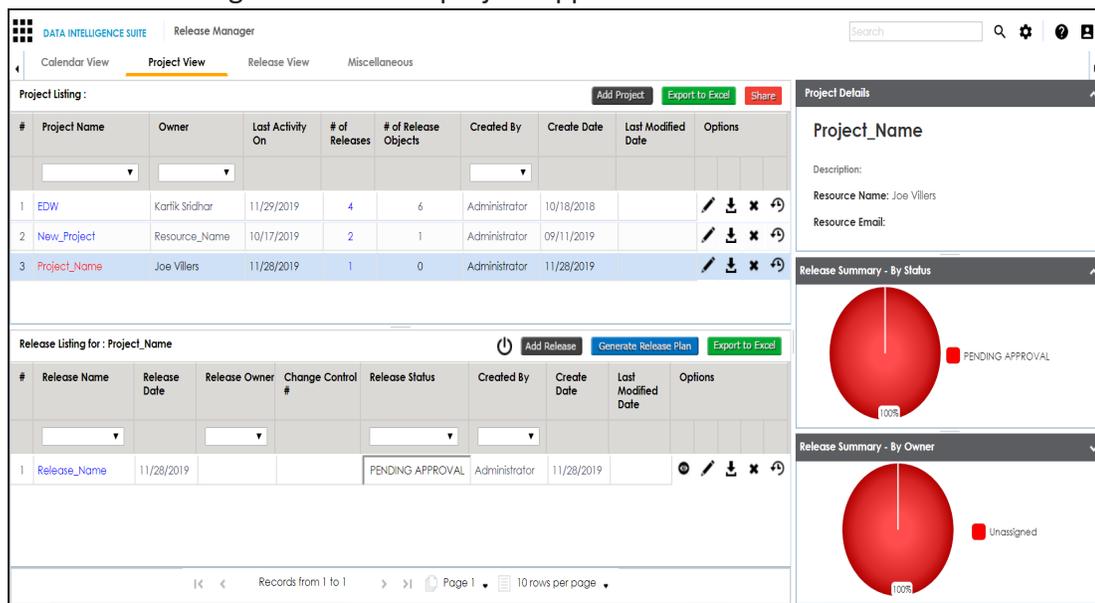
Adding Code Mappings as Release Objects

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.



The screenshot displays the 'Release Manager' interface. The top navigation bar includes 'DATA INTELLIGENCE SUITE' and 'Release Manager'. Below this, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. The main content area is divided into two sections: 'Project Listing' and 'Release Listing for: Project_Name'. The 'Project Listing' table has columns for '#', 'Project Name', 'Owner', 'Last Activity On', '# of Releases', '# of Release Objects', 'Created By', 'Create Date', 'Last Modified Date', and 'Options'. The 'Release Listing' table has columns for '#', 'Release Name', 'Release Date', 'Release Owner', 'Change Control #', 'Release Status', 'Created By', 'Create Date', 'Last Modified Date', and 'Options'. On the right side, there are two summary charts: 'Release Summary - By Status' showing a red circle with '100%' and 'PENDING APPROVAL', and 'Release Summary - By Owner' showing a red circle with '100%' and 'Unassigned'. The bottom of the interface shows pagination controls: 'Records from 1 to 1', 'Page 1', and '10 rows per page'.

2. Click the required <Release_Name>.

The Release View page appears showing the release object details.

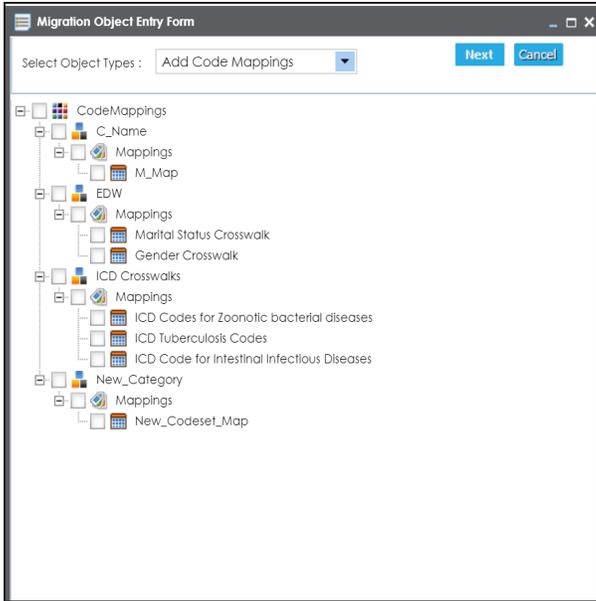
3. Click **Add Object**.

The Migration Object Entry Form page appears.

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

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

The following page appears.



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

The Migration Object Entry Form page reappears.

 A screenshot of the 'Migration Object Entry Form' window after clicking 'Next'. The 'Select Object Types:' dropdown still shows 'Add Code Mappings'. To the right are 'Previous', 'Save', and 'Cancel' buttons. The main area contains several input fields:

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

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

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

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.

The screenshot shows the 'Release Manager' interface. At the top, there are navigation tabs: 'Calendar View', 'Project View', 'Release View' (selected), and 'Miscellaneous'. Below the tabs, there are dropdown menus for 'Select Project' and 'Select Release'. To the right, there are buttons: 'Add Release', 'Edit Release', 'Generate Release Plan', 'Activity Log', 'Delete Release', and 'Share'. The main content area is divided into three summary charts: 'Release Summary - By Status' (showing 'PENDING APPROVAL - 5'), 'Release Summary - By Owner' (showing 'Unassigned - 5'), and 'Release Summary - By Type' (a pie chart showing 'Code Map - 1', 'Code Set - 1', 'Item - 2', and 'DDL Script - 1'). Below the charts is the 'Release Object Details' section, which includes a table with columns: '#', 'Object Name', 'Object Status', 'Type', 'Version', 'Date/Time' (with sub-columns for 'Live Date' and 'Migration Date'), 'Migration Details' (with sub-columns for 'From' and 'To'), 'Owner', 'Created By', 'Create Date', and 'Options'. The table contains 5 rows of data, all with a status of 'PENDING APPROVAL'. At the bottom, there are navigation controls for the table, including 'Records from 1 to 5', 'Page 1', and '5 rows per page'.

8. Use the following options:

Edit (✎)

To edit the release object, click ✎.

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

Information (i)

To view the mapping information, click i.

Download (↓)

To download the release object details, click .

Email

To send email notification about the release object click .

Delete

To delete the release object, click .

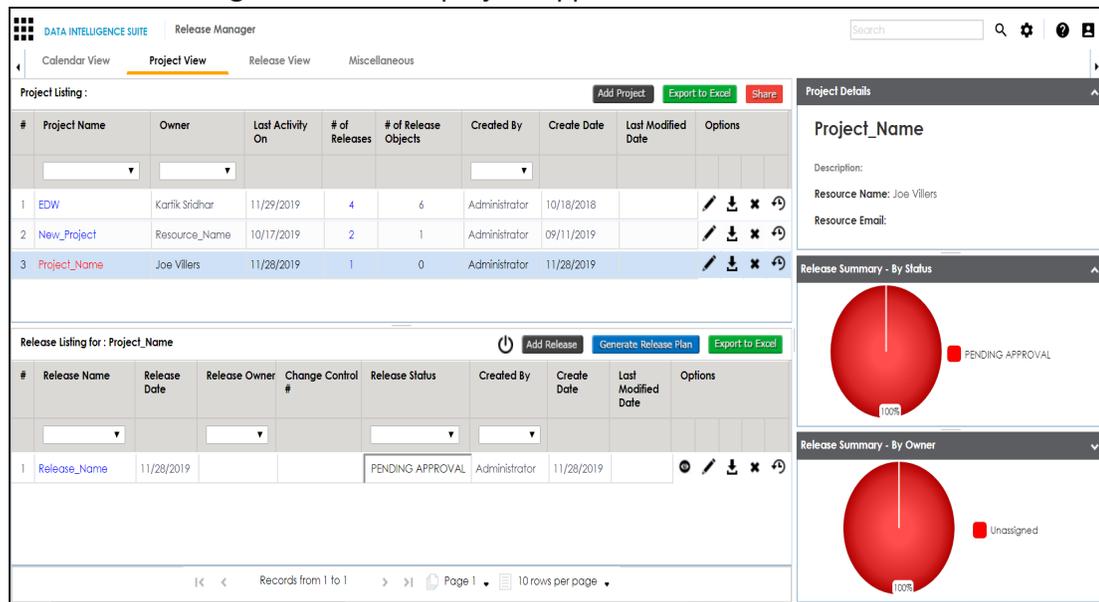
Adding Miscellaneous Objects

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

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

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

The release listing of the desired project appears.



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

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

2. Click the required <Release Name>.

The Release View page appears.

3. Click **Add Object**.

The Migration Object Entry Form page appears.

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.

The screenshot shows the Release Manager interface. At the top, there are tabs for Calendar View, Project View, Release View (selected), and Miscellaneous. Below the tabs, there are dropdown menus for 'Select Project' and 'Select Release'. A search bar and several action buttons (Add Release, Edit Release, Generate Release Plan, Activity Log, Delete Release, Share) are visible. The main content area is divided into three summary charts: 'Release Summary - By Status' (showing PENDING APPROVAL-4), 'Release Summary - By Owner' (showing Unassigned - 4), and 'Release Summary - By Type' (showing Code Set - 1, Data Item - 2, DDL Script - 1). Below the charts is the 'Release Object Details' section, which includes a table of release objects.

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

7. Use the following options:

Edit (✎)

To edit, the release object, click ✎.

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

Information (i)

To view the mapping information, click i.

Download (↓)

To download the release object details, click ↓.

Email (✉)

To send email notification about the release object click ✉.

Delete (✕)

To delete the release object, click ✕.

Moving Release Objects

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

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.

The screenshot displays the 'Release Manager' interface. At the top, there are tabs for 'Calendar View', 'Project View' (selected), 'Release View', and 'Miscellaneous'. Below the tabs is a 'Project Listing' table with columns: #, Project Name, Owner, Last Activity On, # of Releases, # of Release Objects, Created By, Create Date, Last Modified Date, and Options. The table contains three rows, with the third row (Project Name) selected. To the right of the table is a 'Project Details' panel showing 'Project_Name', Description, Resource Name (Joe Villers), and Resource Email. Below the project details is a 'Release Listing for: Project_Name' table with columns: #, Release Name, Release Date, Release Owner, Change Control, Release Status, Created By, Create Date, Last Modified Date, and Options. The table contains one row with 'Release_Name' and 'PENDING APPROVAL' status. To the right of the release listing are two 'Release Summary - By Status' and 'Release Summary - By Owner' panels, each showing a red pie chart with a 100% indicator and a legend for 'PENDING APPROVAL' and 'Unassigned'. At the bottom of the interface, there is a pagination bar showing 'Records from 1 to 1', 'Page 1', and '10 rows per page'.

2. Click the desired <Release Name>.

The Release View page appears showing the release object details.

DATA INTELLIGENCE SUITE Release Manager

Calendar View Project View **Release View** Miscellaneous

Select Project* [Project_Name] Select Release* [Release_Name] Add Release Edit Release Generate Release Plan Activity Log Delete Release Share

Nov 2019
29 Fri
PENDING APPROVAL

Release Name
Description:
Change Control #:
Release Owner:

Release Summary - By Status: 100% PENDING APPROVAL-5

Release Summary - By Owner: 100% Unassigned - 5

Release Summary - By Type: 20% Code Map - 1, 20% Code Set - 1, 20% Item - 2, 40% DDL Script - 1

Release Object Details

Select Status ALL Select User ALL Select Type ALL Add Object Move Objects Promote Maps

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

Records from 1 to 5 Page 1 5 rows per page

3. Click **Move Object**.

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

Move Objects

Release Objects Data Repository Move To

Save Cancel

Select Project* [Please select Project]

Select Release*

Projects

- EDW
 - Releases
 - March 31 2019 Hotfix Release
 - Release Objects
 - SAP
 - Test
 - DDL Script
 - Pfizer Test
 - Release Objects
 - Release_New
 - Release Objects
 - Object_Name
 - Test
 - Release Objects
 - New_Project
 - Releases
 - New_Release_Name
 - Release Objects
 - Release_Name
 - Release Objects
 - Project_Name
 - Releases
 - Release_Name

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

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

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

Sorting Projects and Releases

You can sort project listing in the Project View by:

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

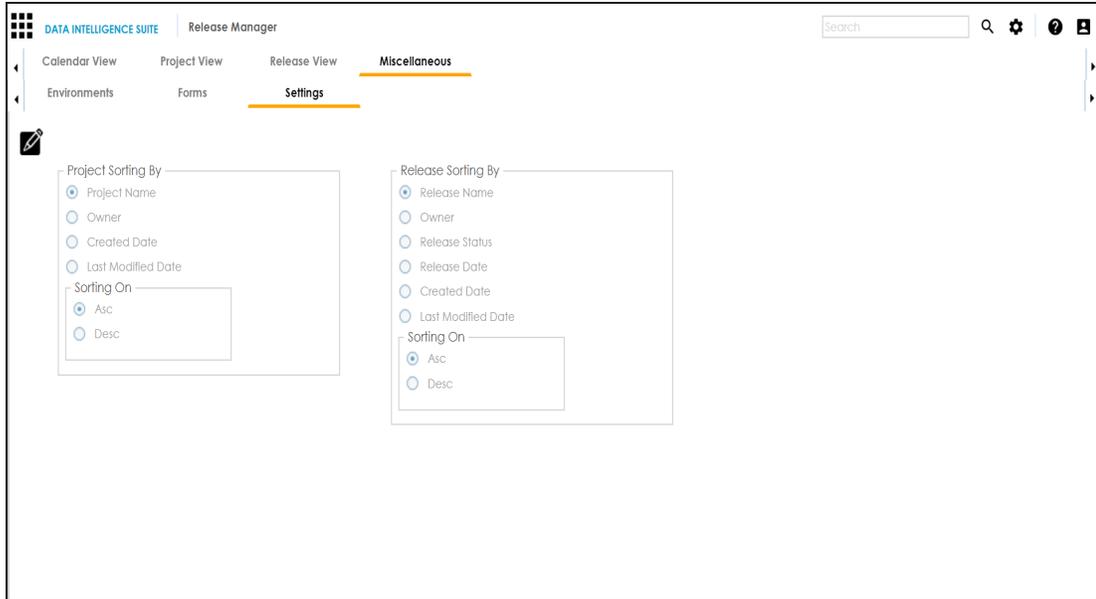
To sort projects, follow these steps:

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

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

2. Click **Settings**.

The following page appears.



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

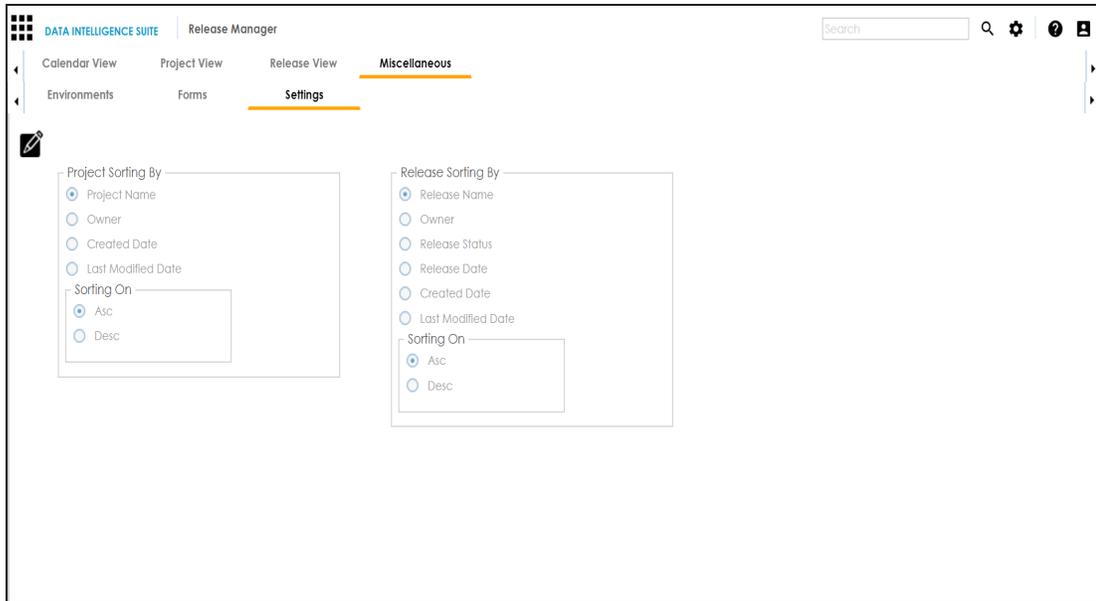
The project listings are sorted in the Project View.

You can sort release listings by:

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

To sort release listings, follow these steps:

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



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

The release listings are sorted in the Project View.