Emoveo Version 2.6

PPMetrics – User Guide

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1. Introduction

This document provides information about using the Emoveo application for code migration. It was written for:

- Emoveo users

Related documents:

- Installation and Administration Guide
- Configuration Guide
- Report Configuration Guide

2. Emoveo Overview

Emoveo is an application that automates the IT organizational process of code deployment. It enables organizations to define their custom migration processes, then execute them in compliant and efficient manners. Emoveo is a web-based tool with a friendly user interface, designed to take the complexity out of this critical yet cumbersome process.

3. Emoveo Objects and Concepts

- **Migration** - Migration, or deployment, is the organizational process of transferring one or more application components through a structured process (e.g., file, script).
- **Environment** - A server or a database instance which the migration processes may transfer components from and to.
- **Object Type** - A series of technical steps required to execute as part of the migration process.
- **Special Command** – Particular reusable function embedded in one or more object types and commands.
- **Package Line** – A single application component to be migrated (e.g. AOL or SQL). This is typically migrated as a part of larger migration or package (defined below).
- **Package** - A group of application components or package lines which are being migrated as part of the same migration.
- **Workflow** - A structured flow, consisting of a user-defined number of steps, defining a migration process, and followed throughout its instances.
- **Custom Fields** - Various Emoveo objects allow configurators to augment the canned fields with custom ones.

4. Creating Packages

Packages are the central Emoveo objects, representing logical units of objects being migrated as part of the same migration. Each package is associated with a single workflow upon its creation, and each of its objects processed through an instance of that workflow. Furthermore, each package maintains a status indicator, automatically derived by Emoveo, in accordance with the following logic:

- Not Submitted – The package's objects have not started traversing their workflows.
- In Progress – The package has been submitted and its objects are being processed through their workflows, with at least one of which yet to complete.
- Complete (Success) – All the package's objects have successfully completed their workflow execution.
- Complete (Failure) – All the package's objects have unsuccessfully completed their workflow execution.
- Complete (Mixed) – One or more of the package's objects have successfully completed their workflow execution and one or more of the package's objects have unsuccessfully completed their workflow execution.

4.1. Creation from Scratch

To create a package from scratch, click on the Create button on the top pane of Emoveo. Following which, the package creation screen opens, with the following required and optional fields to fill out:

Prompt	Description
Package No.	A unique numeric identifier of the package. Leave the default value of AUTO to have Emoveo pick a unique number automatically
Description	A required brief description of the package. Please note that this field is commonly used for search and reporting, and therefore it is recommended to input a meaningful value
Workflow	A required field, specifying the workflow which the package lines will traverse, based on the list of enabled and configured workflows in the system
Custom field(s)	If custom field(s) have been configured, they will be displayed at the bottom of the screen

Table 1 - Basic package fields

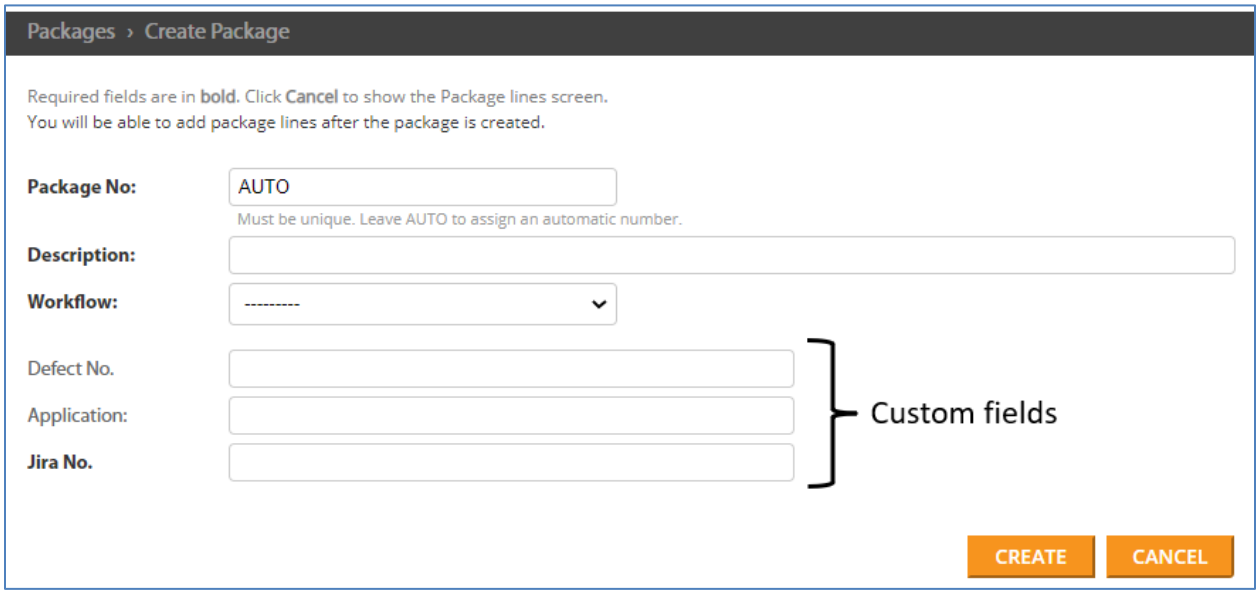


Fig. 1 - The package creation screen

4.2. Creation by Copying an Existing Package

Sometimes, a new package which needs to be created is almost identical to a previously created package. In such cases, it is convenient to create the new package by copying an existing one rather than creating from scratch. To copy one or more packages at once, go to the Search menu item on the top pane, check the box to the left of each package to copy, then select 'Copy selected Packages' from the 'Action' field and hit GO.
Newly copied packages contain the following attributes:

- Their description is set to 'Copy of [original package no.]' and may be modified later.
- All the package lines are copied.
- They are not submitted automatically, providing the creator the ability to modify them prior to submission.

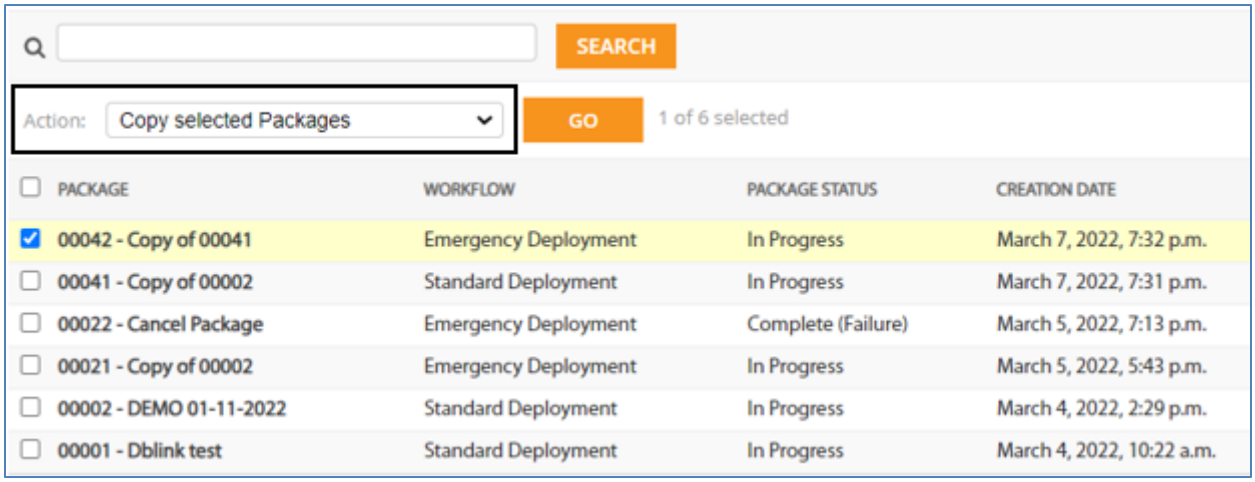


Fig. 2 - Package creation through copying

4.3. Editing Package Information

The package information provided upon creation, or copied from an existing package, may be modified post creation by clicking on the Edit link to the right of the package name. The only exception is the workflow field, which may be changed post creation, but not post submission.

4.4. Package Line Operations

Package lines are the building blocks of packages, each of which used to migrate a specific object and travels through its own instance of the package's workflow. The package lines of a given package may be classified into sequential migration groups, visible to the right of the EDIT link, and then be processed by Emoveo in that order. For example:

- Group 1 lines 1,2,3,4.
- Group 2 lines 1,2.

The table below lists the available package line operations and their methods of execution:

Operation	Method
View package line(s) details	Existing package lines appear in a wide table below the basic package information. This table consists of two sections: Line Details, displaying basic information about each package line, and Workflow, displaying the status of the line in each workflow step
Add package line	Click on the 'Add Package Line' button on the bottom left. Please note that package lines may be added to packages for as long as they are not in one of the closed statuses. Once clicked, a single object type has to be selected out of the eligible ones for the chosen workflow. Depending on the object type selected, a certain set of fields then have to be filled out, as per the type's configuration
Edit package line	Click on the EDIT link toward the left side of the package line
Copy package line(s)	Check the box to the left of every package line to copy and hit the COPY button on the black pane above the package lines. Emoveo then presents three options: • Copy selected preserving Groups: Makes the new line(s) members of the copied line's group • Copy selected into new Group: Makes the new line(s) members of a newly created group • Copy selected into new Package: Adds the new line(s) to a new package. The new package inherits the workflow definition of the original package Please note that when the copy operation is initiated from a closed package only the third option is available
Cancel package line	Check the box to the left of the package line to cancel and hit the CANCEL button on the black pane above the package lines. Please note that closed package lines may not be cancelled
Reset package line(s)	Allows the end-user to re-run the step in cases where no outbound transition have been defined for the step. Examples would be situations of timeouts or hanging executions
Re-sequencing package line	Drag the line to re-sequence by clicking on the three-line icon next to the boxes on the left and then using the mouse to drag it up or down. When

	the line dragging is complete, Emoveo presents the user with the option of creating a migration group for that line, or re-sequencing it within its original group
Add package line(s) to a new group	In situations where one or more lines need to become a part of new groups, Emoveo provides a faster option than using the re-sequencing method through the 'Add selected to new group' link below the package lines table

Table 2 - Package line operations

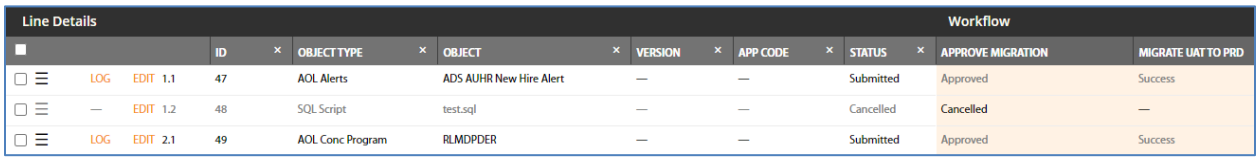


Fig. 3 - The package lines table

4.5. Searching for Packages

In large organizations with a high number of Emoveo packages, often the need arises to search for existing packages using various criteria. The Emoveo search function is accessible through the Search link on the top pane. The search screen provides two ways of searching for packages:

- Entry of a search string into the text box on the left side of the screen. Please note that Emoveo then queries the package number and package description fields.
- Utilizing the filter pane on the right side of the screen, which allows filtering for packages based on their action eligibility, status, package status, included object type, workflow, and last update date.

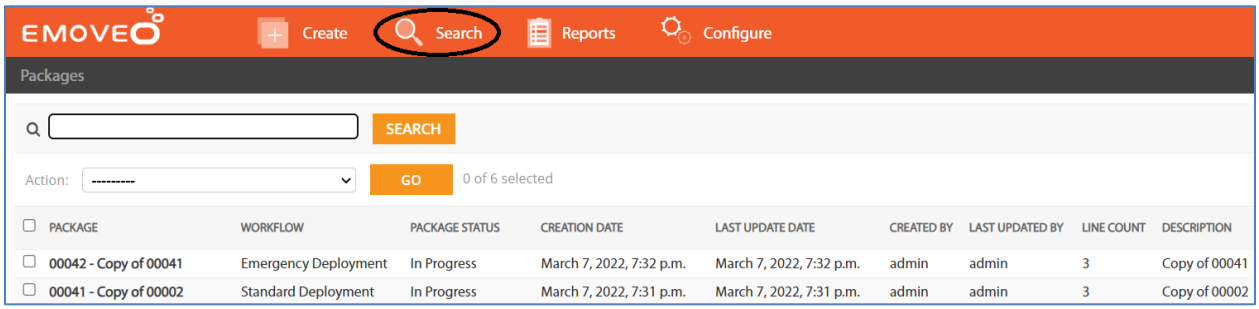


Fig. 4 - Searching for packages

5. Processing Packages

5.1. Submitting Packages

When all the necessary package lines have been added and ready to be processed through their workflows, the package is ready for submission. Emoveo provides two methods of submitting packages:

- Clicking on the 'Submit Package' button on the top right corner of the package screen.
- From the Search screen, checking the boxes next to all the packages to be submitted, then clicking on 'Submit selected Packages' from the 'Action' field, and hitting GO.

Please note that if package lines are added to the package post submission, Emoveo makes the package eligible for submission again, in order to allow the user to initiate the workflow for the new lines.

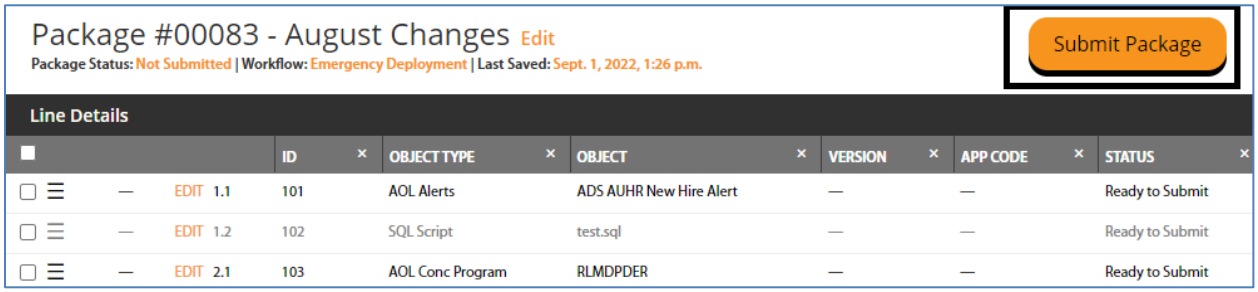


Fig. 5 - Submission of an individual package

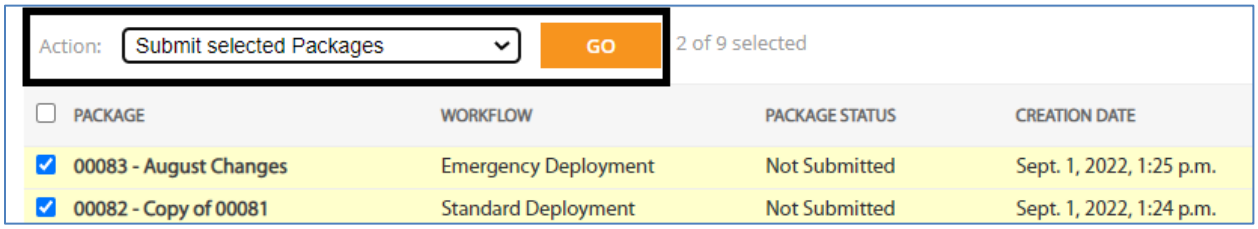


Fig. 6 - Submission of multiple packages

5.2. Workflow Operations

Once the package has been submitted, its package lines enter their workflows. Depending on the details of the workflow configuration, various users may need to make decisions in different steps. To view the eligible decisions of a package line, if any, check the box on the far left. If there are any eligible decisions for the active user, they will be presented on the right side of the black pane above the package lines. Please note that if more than one box has been checked, and all of which have the same eligible decisions by the active user, Emoveo will display and process them together once a decision was made.

5.3. Viewing Line History and Execution Log

At any point of package lines' lifecycle, their history and execution log may be queried to provide full details of their path, as detailed below:

Operation	Method
View package line history	Check the box to the left of the package line, then click on 'View Line History'. The line history displays the workflow configuration details, workflow transaction history, and workflow step transitions
View package line log	Click on the LOG link on left side of the package line. The log displays the actual command lined executed by Emoveo throughout the workflows, and often useful for troubleshooting purposes

Table 3 – Package line audit operations

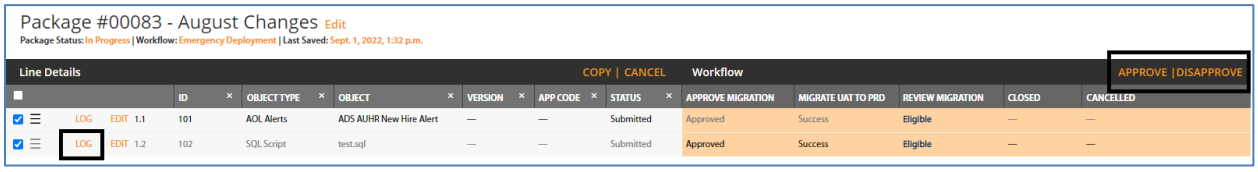


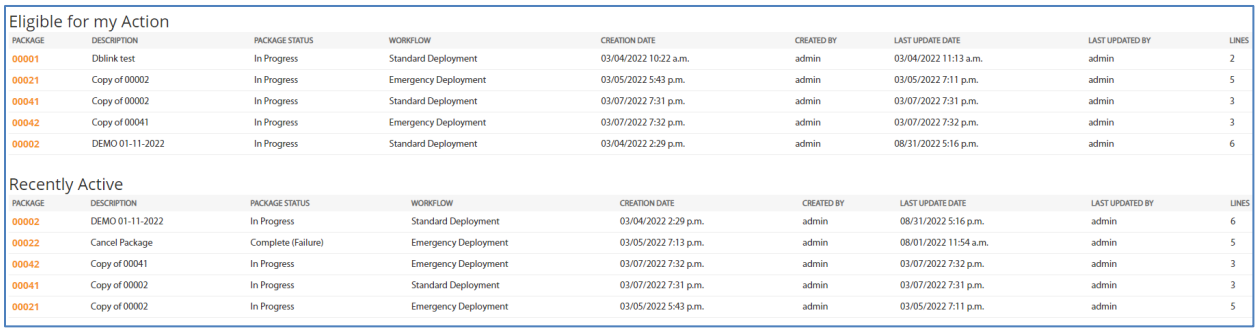
Fig. 7 - Advancing the workflow and viewing the log

6. Additional User Operations

6.1. Using the Dashboard

The dashboard is the default page the user sees once logging on the Emoveo, or when clicking on the Emoveo logo on the top left corner. The dashboard consists of two “portlets” which are small windows presenting key information, including links to packages:

- Eligible for my action – Active packages which the active user is eligible to advance their workflow.
- Recently active – The five most recently updated packages in the system.



Eligible for my Action

PACKAGE	DESCRIPTION	PACKAGE STATUS	WORKFLOW	CREATION DATE	CREATED BY	LAST UPDATE DATE	LAST UPDATED BY	LINES
00001	Dblink test	In Progress	Standard Deployment	03/04/2022 10:22 a.m.	admin	03/04/2022 11:13 a.m.	admin	2
00021	Copy of 00002	In Progress	Emergency Deployment	03/05/2022 5:43 p.m.	admin	03/05/2022 7:11 p.m.	admin	5
00041	Copy of 00002	In Progress	Standard Deployment	03/07/2022 7:31 p.m.	admin	03/07/2022 7:31 p.m.	admin	3
00042	Copy of 00041	In Progress	Emergency Deployment	03/07/2022 7:32 p.m.	admin	03/07/2022 7:32 p.m.	admin	3
00002	DEMO 01-11-2022	In Progress	Standard Deployment	03/04/2022 2:29 p.m.	admin	08/31/2022 5:16 p.m.	admin	6

Recently Active

PACKAGE	DESCRIPTION	PACKAGE STATUS	WORKFLOW	CREATION DATE	CREATED BY	LAST UPDATE DATE	LAST UPDATED BY	LINES
00002	DEMO 01-11-2022	In Progress	Standard Deployment	03/04/2022 2:29 p.m.	admin	08/31/2022 5:16 p.m.	admin	6
00022	Cancel Package	Complete (Failure)	Emergency Deployment	03/05/2022 7:13 p.m.	admin	08/01/2022 11:54 a.m.	admin	5
00042	Copy of 00041	In Progress	Emergency Deployment	03/07/2022 7:32 p.m.	admin	03/07/2022 7:32 p.m.	admin	3
00041	Copy of 00002	In Progress	Standard Deployment	03/07/2022 7:31 p.m.	admin	03/07/2022 7:31 p.m.	admin	3
00021	Copy of 00002	In Progress	Emergency Deployment	03/05/2022 5:43 p.m.	admin	03/05/2022 7:11 p.m.	admin	5

Fig. 8 - The Emoveo dashboard

6.2. Generating Reports

Emoveo reports are different than dashboards in a sense that they can display larger amount of data, in a highly configurable fashion. To access the reports section of Emoveo, click on the Reports link on the top pane. The reports screen supports the following operations:

Operation	Method
Search report(s)	Utilize the search text box on the left side of the screen, or the filters pane on the right
Copy report(s)	Check the box to the left of every existing report you would like to copy. Then, from the ‘Action’ field, select ‘Copy selected Reports’ and hit GO
Delete report(s)	Check the box to the left of every existing report you would like to delete. Then, from the ‘Action’ field, select ‘Delete selected Reports’ and hit GO
Add report	Click on the ADD REPORT button at the bottom of the screen

Table 4 - Report screen operations

When adding a report, Emoveo navigates to a screen from which the user is asked to select one of the available report types, and optionally provide a report description.

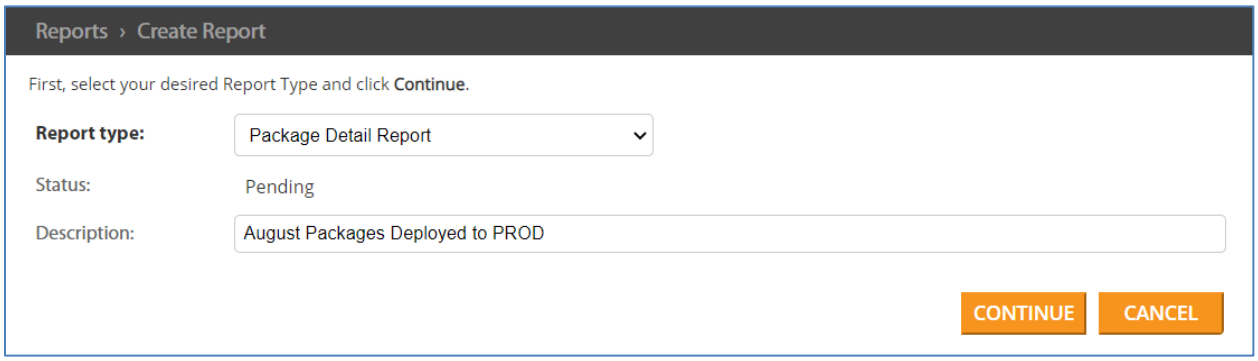


Fig. 9 - Report generation, first step

In the following step, a filters screen is presented, allowing the user to narrow down the report's result set. Once satisfied with the filters, hitting RUN REPORT or SAVE will generate the report and display the download link. If the user wishes to re-execute the report for a different set of filters, he may then modify them and hit RUN REPORT AGAIN. Please note that the reports screen always displays a link to the latest generation of each report.

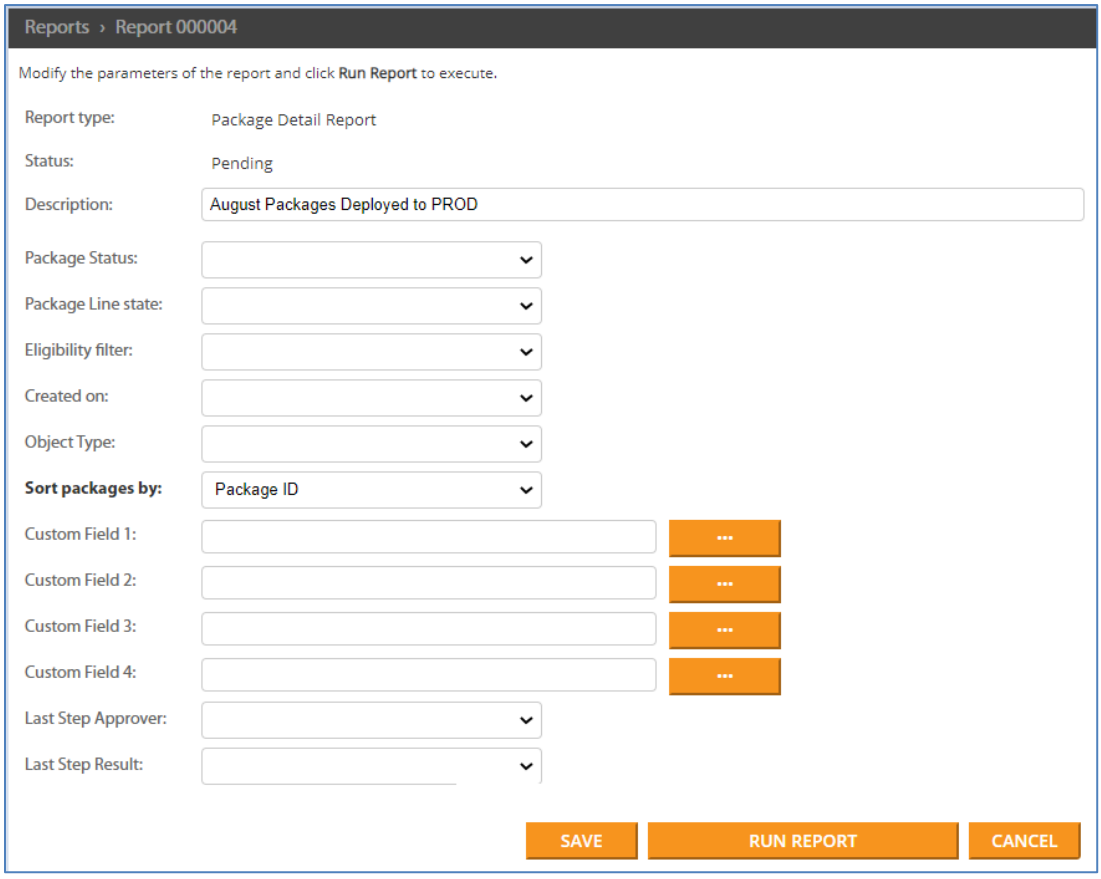


Fig. 10 - Report generation, second step

6.3. Changing the Password

Users may change their Emoveo password anytime, which takes effect immediately. To access the password change screen, go to the menu item Profile -> Change Password, and fill out the three required fields.

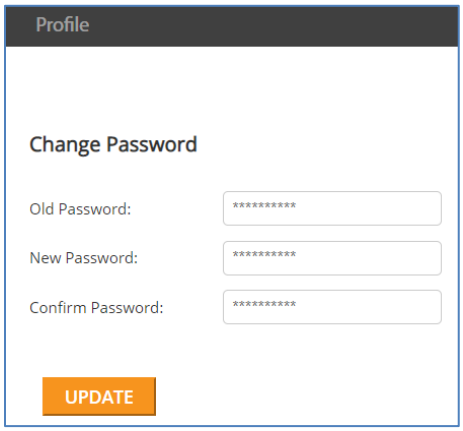


Fig. 11 - The password change screen