erwin Data Modeler Scheduler

Release 14.0

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Contents

Introduction **6**

Installing erwin DM Scheduler 7

Getting Started 10

Using erwin DM Scheduler 12

Core Tasks 12

Support Tasks 12

Scheduling Jobs 14

Setting Reverse Engineering Options 20

Setting Recurrence 33

Stopping Recurrence 34

Connecting to Mart 35

Reading Job Status 38

Viewing Event Log 39

Rescheduling, Editing, Copying, and Deleting Jobs 40

Setting Up Remote Server Configurations 41

Customizing and Configuring the Scheduler 47

Customizing the Calendar View 48

Setting Calendar Options 49

Setting Time Scale and Time Zone 53

Displaying the Data Picker 54

Setting up Email Notifications 55
Setting Predefined Reverse Engineering Options 57
Setting Tray Service Options 61

Introduction

One of the major features of erwin Data Modeler (DM) is its capability to reverse engineer from databases. However, you have to run reverse engineering (RE) processes manually and limit them to your workday. Thus, during the RE process, the other features of erwin DM are unavailable for use. Also, to configure and run another RE process, one needs to wait until the first process is complete.

erwin DM Scheduler enables you to schedule RE jobs in advance and run them without supervision. Thus, improving the original capability of reverse engineering. A live log keeps you updated about the job status.

Additionally, you can configure the scheduler to save reverse engineered models to a pre-defined location on your device and on the Mart.

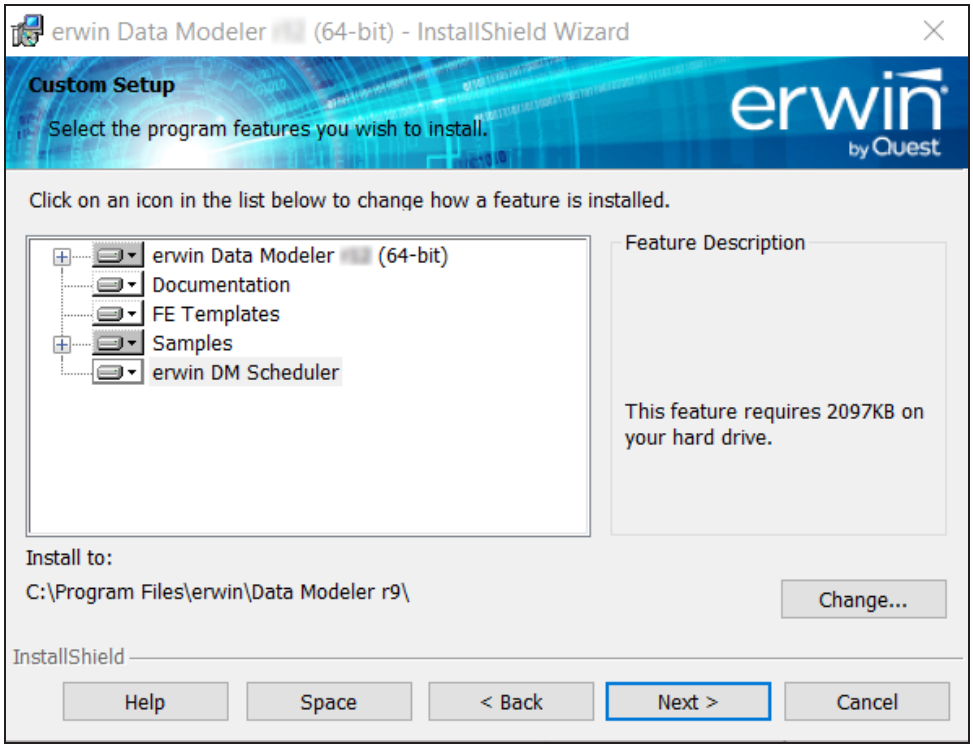
Installing erwin DM Scheduler

erwin DM Scheduler is one of the components in erwin Data Modeler (DM) installer. Installing it installs erwin DM Scheduler Service in your environment.

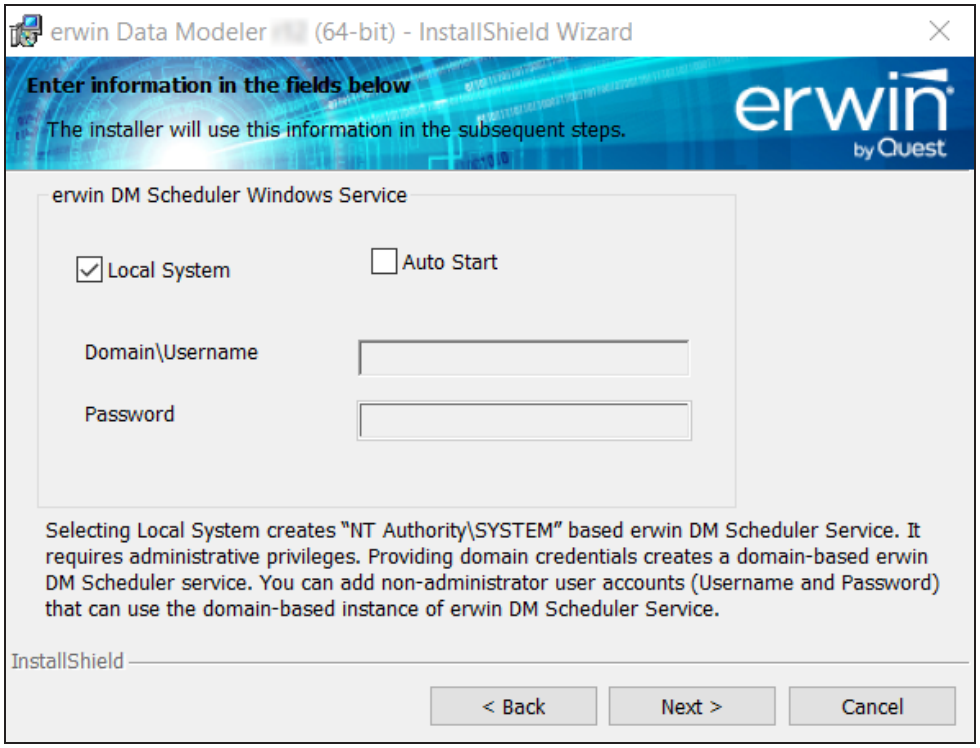
> Installing erwin DM Scheduler installs Windows Resource Kit Tools. It is not a pre-requisite, and you can uninstall it without affecting erwin DM Scheduler's function. However, this set of tools assists you to manage issues in permissions and security for erwin DM Scheduler. It helps you troubleshoot in case you do not have appropriate privileges to use erwin DM scheduler windows service.

To install erwin DM Scheduler, follow these steps:

1. On erwin DM installer, ensure that erwin DM Scheduler is not disabled and click **Next**.



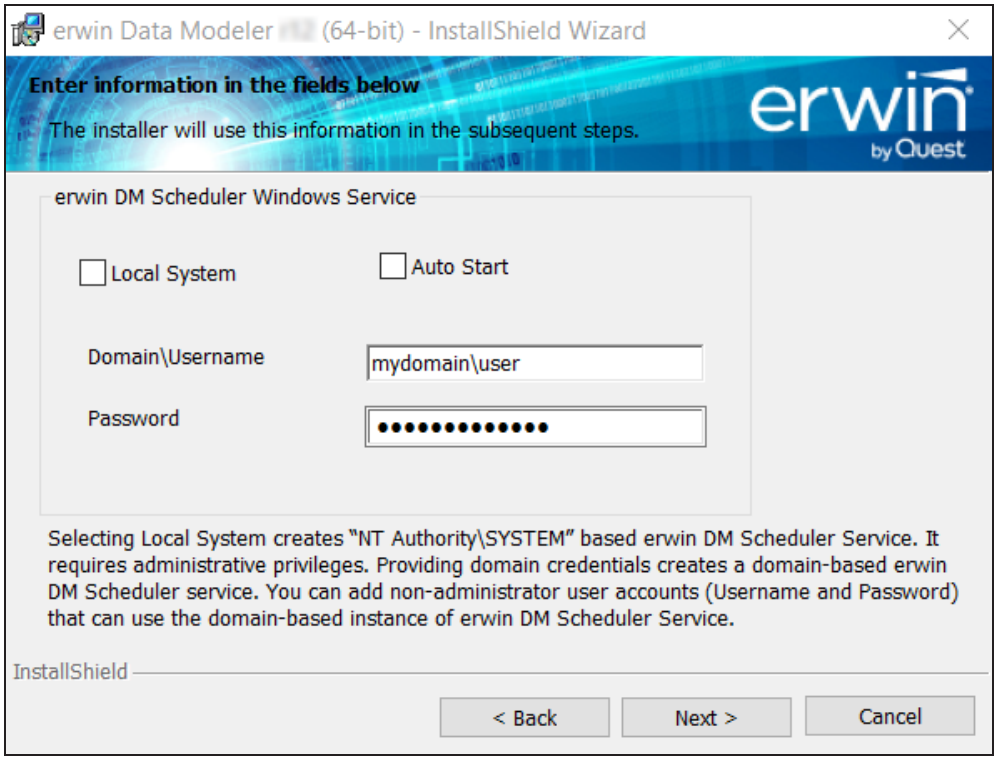
2. Select the type of erwin DM Scheduler Service that you want to create.



You can create a local administrator user-based service or a domain-based non-administrator service.

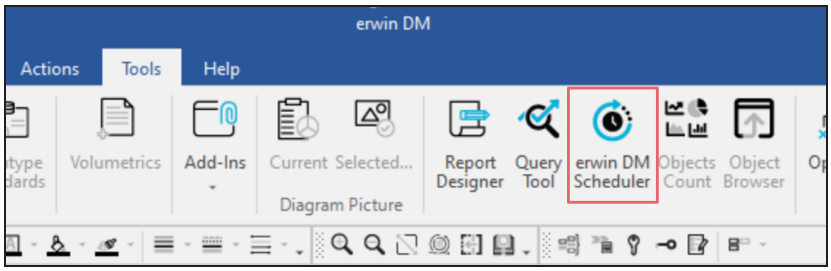
> For a non-administrator user, ensure that you do not select the Local System check box.

To be able to connect to the Mart from the Scheduler using Windows Authentication, instead of Local System, use Domain\Username to create the erwin DM Scheduler Service. For example, the following image shows the Domain\Username format:



For non-administrator users, select the **Auto Start** check box to start the erwin Data Modeler Scheduler Service by default.

3. Finish the installation according to the instructions on next screens.
erwin DM Scheduler Service is installed in your environment and is added to erwin Data Modeler under the Tools tab.



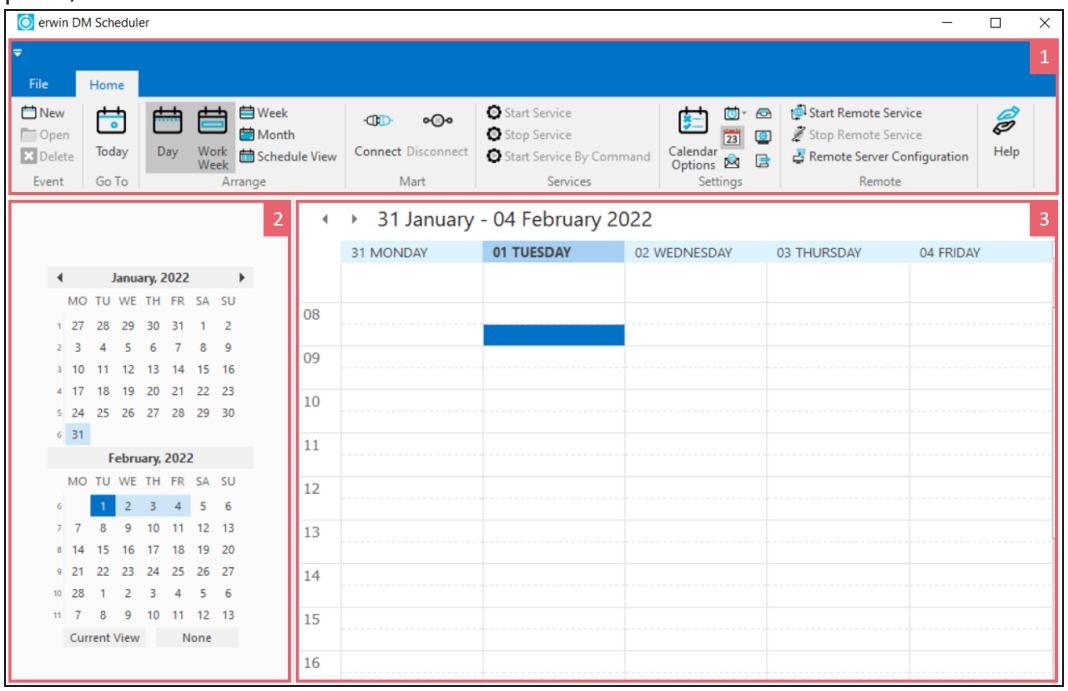
Getting Started

Once you have installed erwin DM Scheduler, to use it, follow these steps:

1. Start erwin Data Modeler (DM).
2. On the ribbon, click **Tools**.
3. Click **erwin DM Scheduler**.
   Then, if you are an administrator user, click **Start Service**. If you are a non-administrator user, the service starts automatically.
   This opens the Scheduler in a new window.

   > In a Microsoft Windows 7 environment, starting or stopping the erwin DM Scheduler Service through erwin DM Scheduler may display a warning. In that case, use Windows Services to start or stop the service.

   erwin DM Scheduler has a tri-pane layout that consists of the ribbon, navigation pane, and calendar view.



Pane	Function
1-Ribbon	The Home tab of the ribbon contains all the actions that you can perform in the Scheduler. It enables you to do the following: 1. Create or work on jobs 2. Manage erwin Mart connection 3. Manage erwin DM Scheduler Service 4. Manage erwin DM Scheduler settings 5. Set up remote servers 6. Customize the calendar view pane 7. Access help
2-Navigation (Date Picker)	The navigation pane (date picker) enables you to navigate today, work week, week, or month depending on your calendar view.
3-Calendar view	The calendar view displays the detailed view and the jobs scheduled during the day, work week, week, or month depending on your calendar view.

Using erwin DM Scheduler

The tasks that you can perform in erwin DM Scheduler can be classified into two types:

- **Core tasks**: These are the tasks that you perform to schedule and run a reverse engineering (RE) job.
- **Support tasks**: These are tasks that you perform to customize and configure the Scheduler.

Core Tasks

The core function of the Scheduler is scheduling and running a reverse engineering job. To schedule and run an RE job, do the following:

- Schedule jobs
- Set reverse engineering options

Based on the options that you select or the way you want to set up jobs, perform the following tasks:

- Connect to erwin Mart
- Set up predefined reverse engineering options
- Set up remote server
- Set recurrence
- Reschedule, copy, and delete jobs
- View event log
- View Scheduler Event Reports

Support Tasks

You can customize the appearance of the Scheduler and configure the fields and options that are displayed on the interface. To customize and configure, do the following:

- Customize the calendar view layout
- Set Calendar Options
- Set Time Scale and Time Zone
- Display or hide the Navigation pane (Date Picker)

- Set up email notifications
- Set up Tray Service options

Scheduling Jobs

You can schedule reverse engineering jobs, set recurrences, run jobs on a remote server, and label and categorize jobs using the Scheduler.

Before scheduling a job, ensure that you do the following:

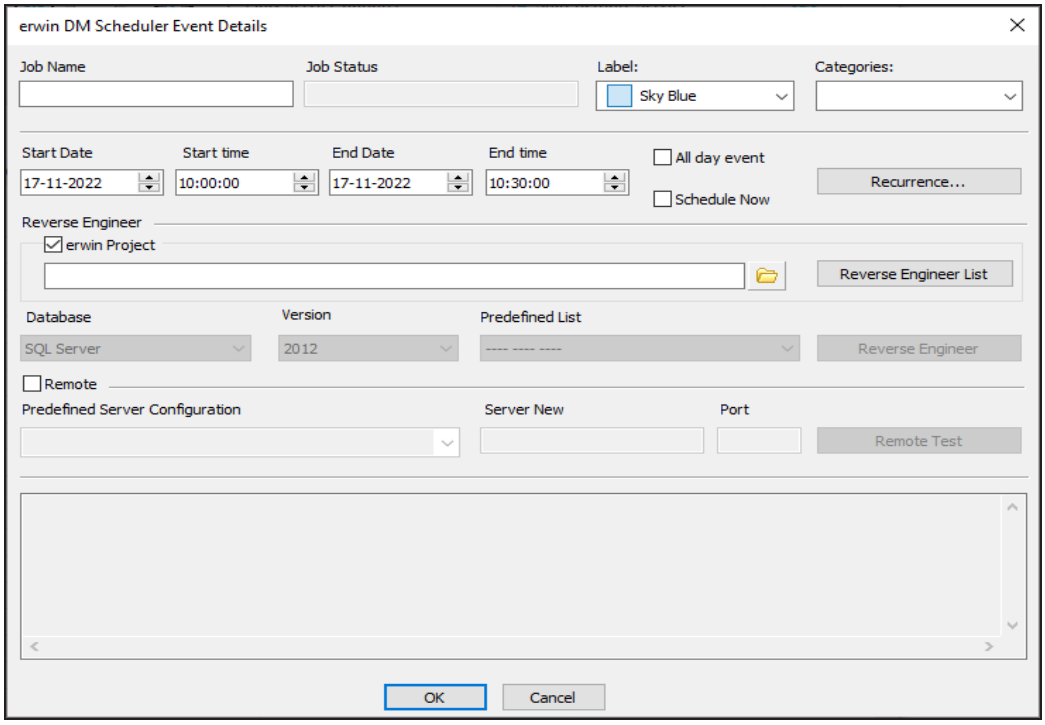
- Local job: On the ribbon, go to **Home** > **Services**. Then, click **Start Service**.
- Remote server job: On the ribbon, go to **Home** > **Remote**. Then, click **Start Remote Service**.

> When you schedule a reverse engineering job for SQL Server 2019 using Windows authentication method, ensure you start the scheduler using the Start Service by Command option.

To schedule reverse engineering (RE) jobs, follow these steps:

1. Create an event in one of the following ways:
    - On the ribbon, go to **Home** > **New**.
    - In the Calendar view, double-click a time slot under the day of your choice.
    - In the Calendar view, right-click a time slot under the day of your choice and click **Add new event**.

The erwin DM Scheduler Event Details screen appears.



2. Configure event options based on your requirement. Refer to the following table for field description.

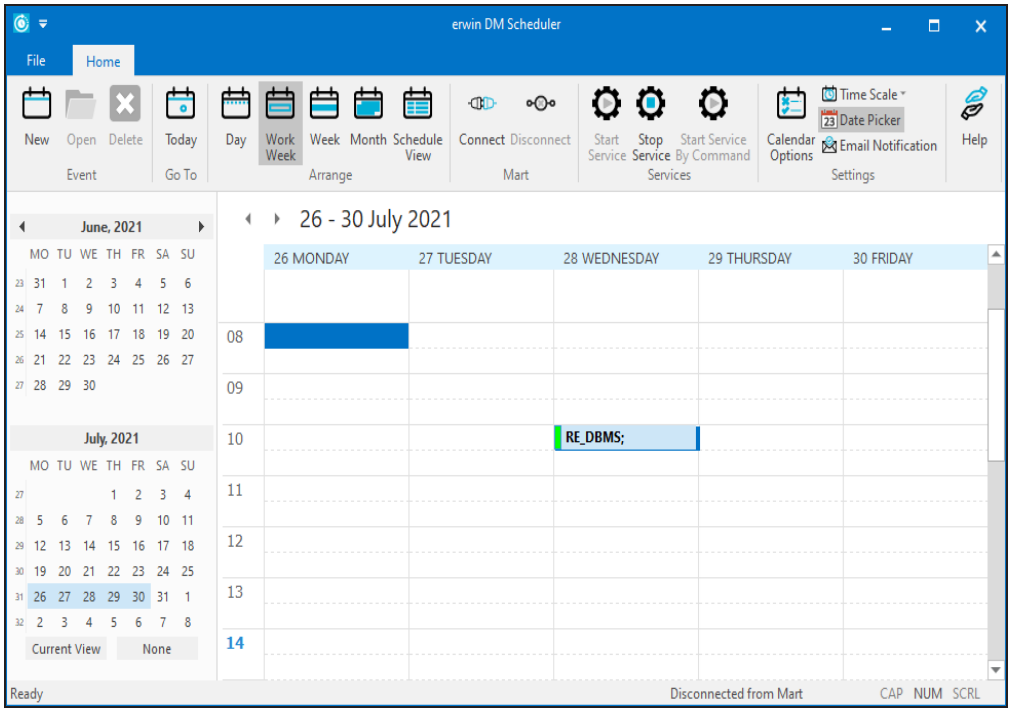
Option	Description	Additional Information
Job Name	Specifies the name of the job	
Job Status	Displays the status of the job	
Label	Specifies the color of the job label	
Start Date	Specifies the start date of the job	▪ Jobs are run serially. Hence, schedule a reasonable job duration. Ensure that you consider the database, its

Option	Description	Additional Information
		size, and the approximate job duration of the current jobs, and then schedule a new job accordingly. ▪ Also, in case of multiple jobs scheduled at the same time with the Schedule Now option, the scheduler randomly selects a job to run. Therefore, it is recommended that you do not schedule multiple jobs to run at the same time.
Start Time	Specifies the start time of the job	
End Date	Specifies the end date of the job	
End Time	Specifies the end time date of the job	
All day event	Indicates whether it is an all-day event	Selecting this option disables the Start Time and End Time options.
Schedule Now	Indicates whether the job runs at the current time	Selecting this option disables the Start Time, Start Date, End Time, and End Date options and schedules the job to run immediately.
Recurrence	Specifies job recurrence options	This option opens the Scheduling Recurrence dialog box, where you can configure recurrence for repetitive jobs.

Option	Description	Additional Information
erwin Project	Specifies that the job will reverse engineer models from an erwin project	Click to open the file explorer and select the required project file. Selecting this option disables the Database, Version, Predefined List, and Reverse Engineer options.
Reverse Engineer List	Specifies the list of models available for reverse engineering in the selected project	
Database	Specifies the database for reverse engineering	If you set Redshift as the database, ensure that you do the following: 1. On the ODBC Data Source Administrator dialog box, go to the **System DNS** tab. 2. Select the Redshift data source and click **Configure**. The Amazon Redshift ODBC Driver DSN Setup dialog box opens. 3. Under Encrypt Password For, ensure that the **All Users of This Machine** check box is selected.
Version	Specifies the database version for reverse engineering	
Predefined List	Displays pre-	For more information, refer to the Setting

Option	Description	Additional Information
	defined list of reverse engineering options	Predefined Reverse Engineering Options topic.
Reverse Engineer	Specifies the job's reverse engineering options	On the Reverse Engineering Wizard, where you can connect to the database and configure reverse engineering options.
Remote	Indicates whether a remote server is used for reverse engineering	
Predefined Server Configuration	Displays the lists of predefined remote servers for reverse engineering	For more information, refer to the Setting Up Remote Server Configurations topic.
Server New	Specifies the IP address of a server in case a new remote server	
Port	Specifies the port number of the new remote server	

3. Click **OK**.
   Your RE job is scheduled. It runs as configured, and the job status and its event log is displayed.



Depending on the settings you make and the job duration that you set, the job tile displays the following information about the job:

- Name
- Status
- Start and end times
- Run time

Setting Reverse Engineering Options

This topic walks you through the steps to schedule a reverse engineering job with a MongoDB model as an example. Similarly, you can schedule a reverse engineering job from any other databases.

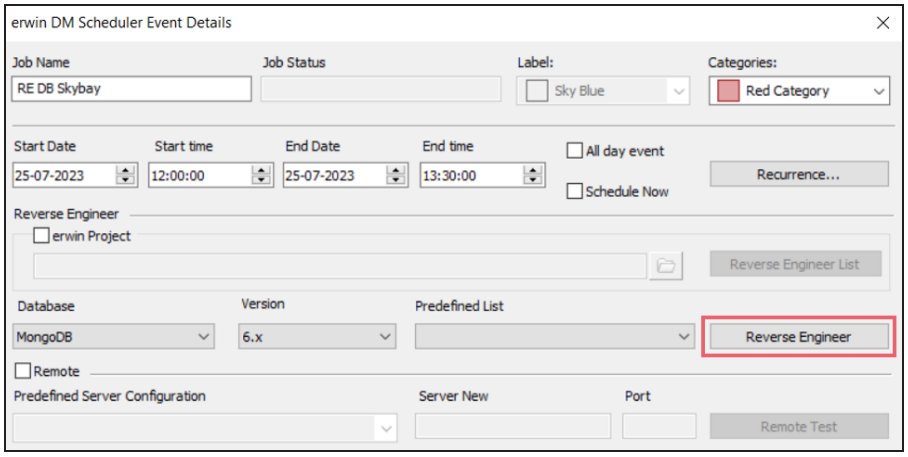
For more information on database specific connection parameter options, refer to Database Connection Parameters topic. For database-specific reverse engineering options, refer to the Reverse Engineering Options for Databases section.

> If you rerun an existing job after adding tables to the corresponding database, ensure that you either do not select any specific tables after selecting a schema on the reverse engineering wizard or edit job properties before running the job again.

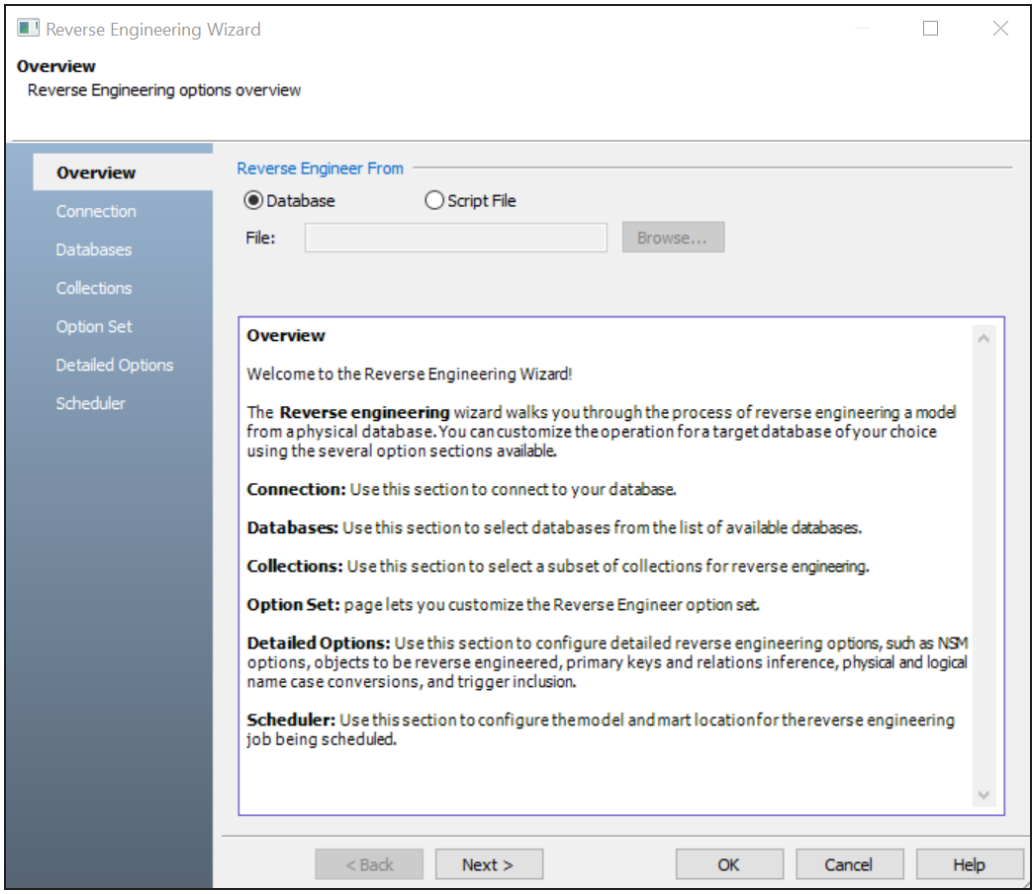
When you click the **Reverse Engineer** option on the erwin DM Scheduler Event Details page, the Reverse Engineering Wizard appears.

To set up revere engineering options, follow these steps:

1. On the erwin DM Scheduler Events Details screen, click **Reverse Engineer**.



   The Reverse Engineering Wizard appears.



2. Click one of the following options:
   - **Database**: Use this option to reverse engineer a model from a database.

     > If you click **Database**, continue to step 5.

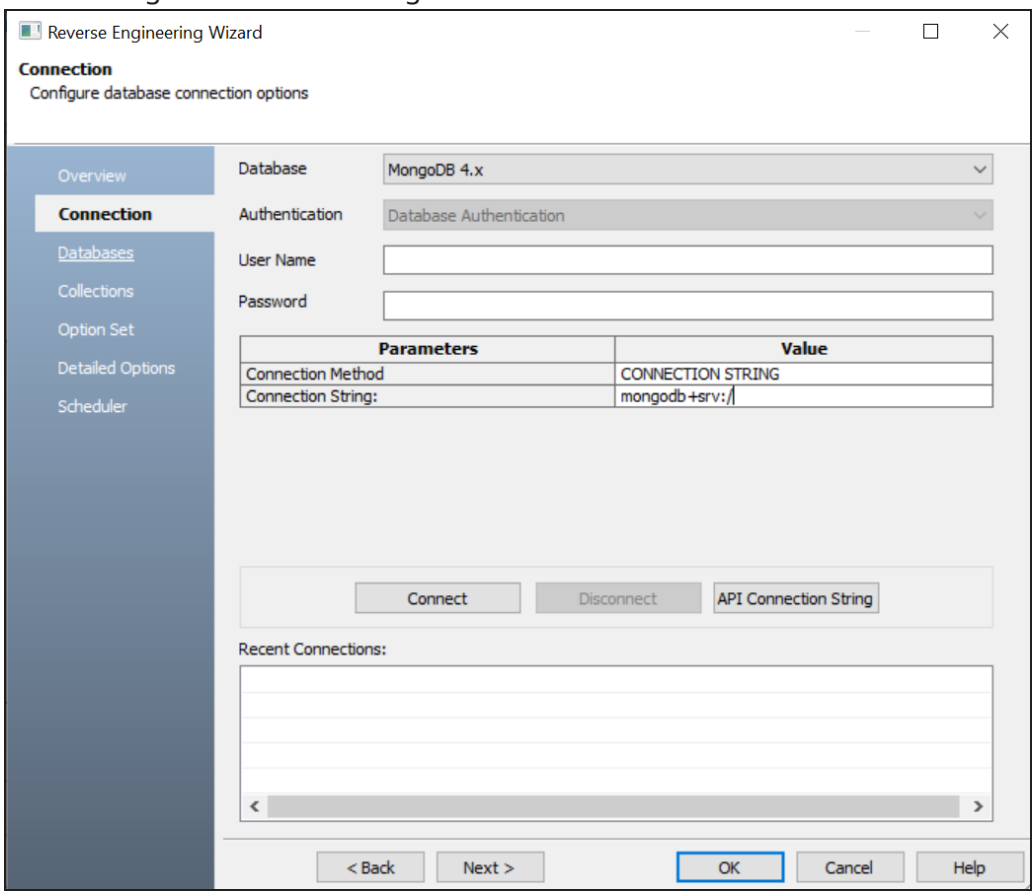
   - **Script File**: Use this option to reverse engineer a model from a script. Selecting this option enables the **File** field. Click **Browse** and select the a script file from your directory.

     > If you click **Script File**, go to step 8 below and ensure that Document Count or Document % is not set to zero (0).

3. Click **Next**.
   The Connection tab appears.

The available connection options differ based on your database. For more information on database-specific connection parameters, refer to the Database Connection Parameters topic.

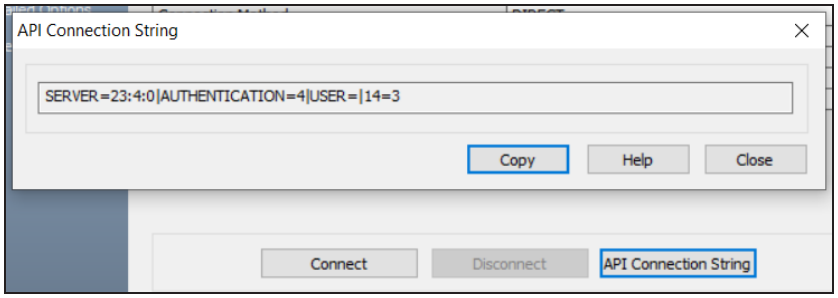
For example, the following image the connection to MongoDB database is established using a connection string.



On a successful connection, your connection information is displayed under Recent Connections.

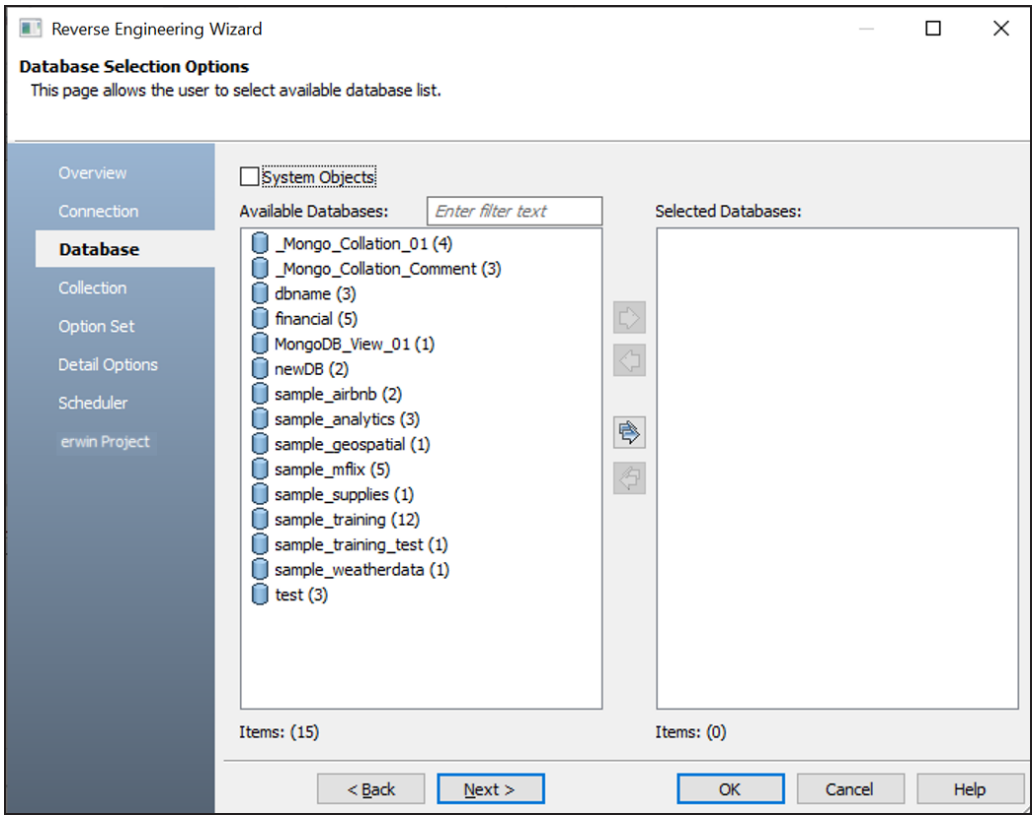
Click the **API Connection String** button to view the API connection string for your database. For more information, refer to the ISCPersistenceUnit::ReverseEngineer

topic in the API Reference guide.

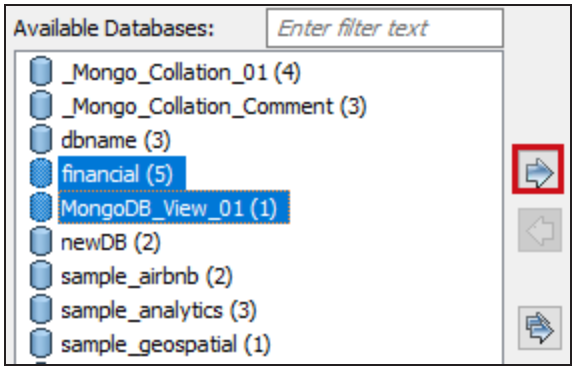


4. Click **Next**.
   The Database tab appears. The available options differ based on your database. For more information on database-specific reverse engineering options, refer to the Reverse Engineering Options for Databases topic.

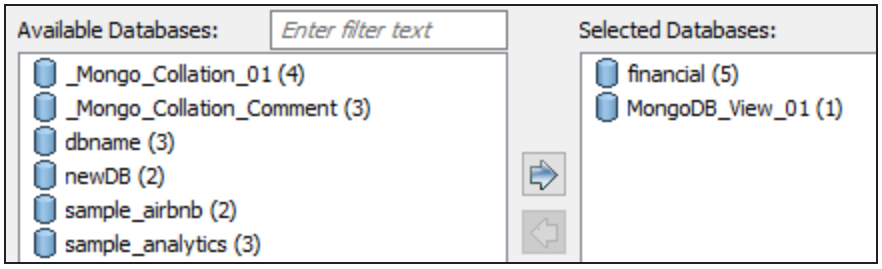
   The Database section appears. It displays a list of available databases.



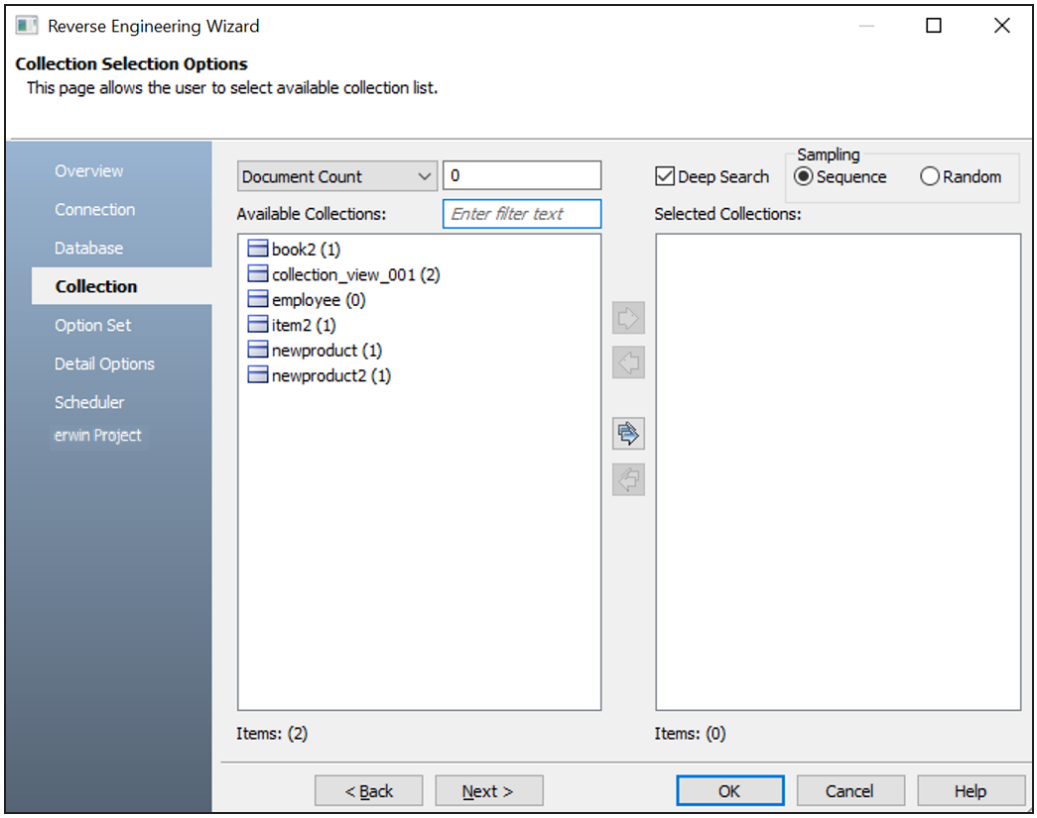
5. Under **Available Databases**, select the databases that you want to reverse engineer. Then, click .



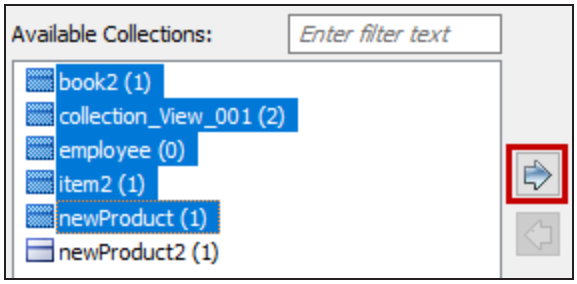
This moves the selected databases under Selected Databases.



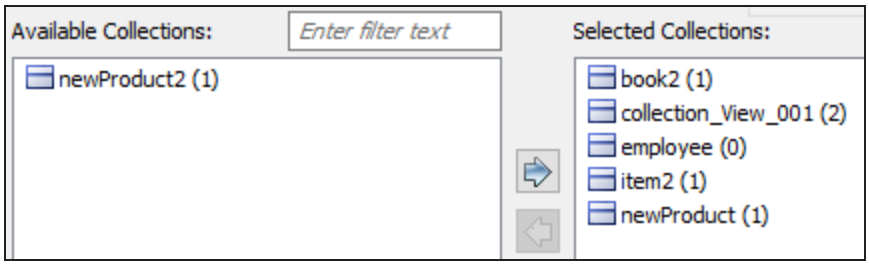
6. Click **Next**.
   The Collection section appears. It displays a list of available collections in the selected.



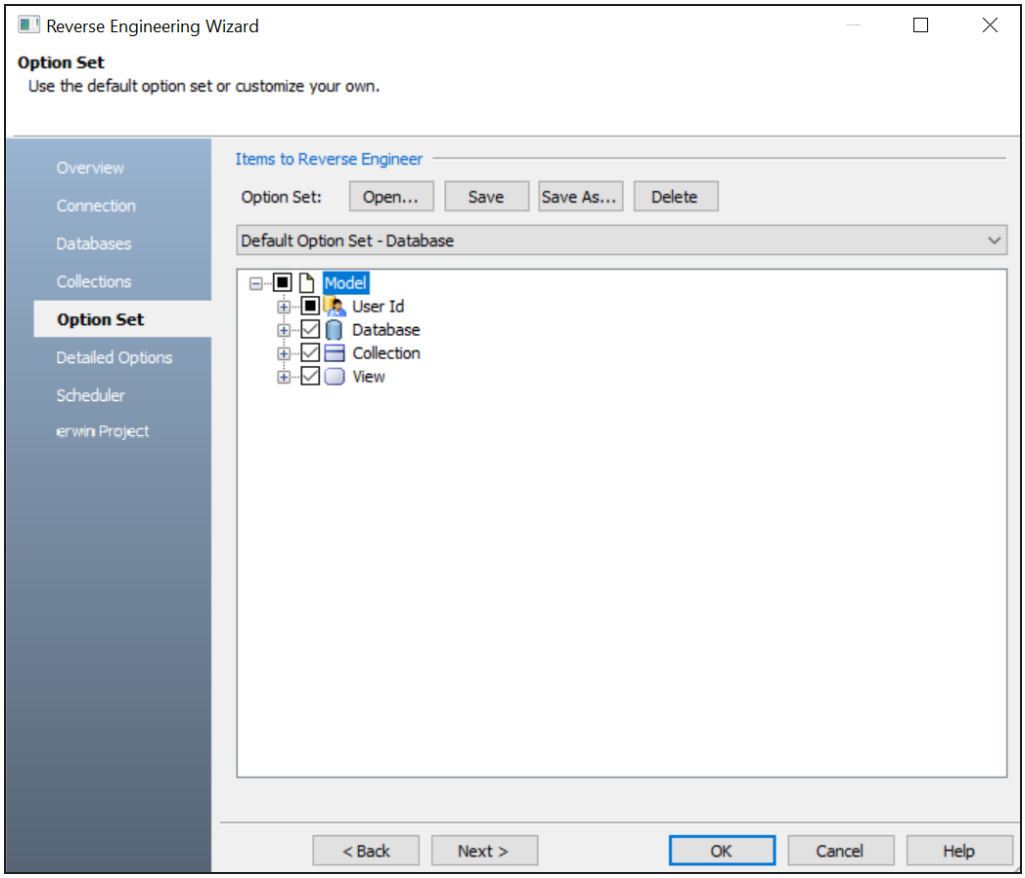
7. Use the following options:
   - **Document Count/Document (%)**: Use this option to specify the number of documents or percentage of total records that the newly generated model schema would contain.
   - **Deep Search**: Use this option to specify whether the deep search algorithm is used to retrieve the right samples for schema generation.
   - **Sampling**: Use the Sequence or Random sampling methods to sample records in the selected collections. Sampling enables you to retrieve right estimates for accurate collection schema generation.
8. Under **Available Collections**, select the collections that you want to reverse engineer. Then, click .



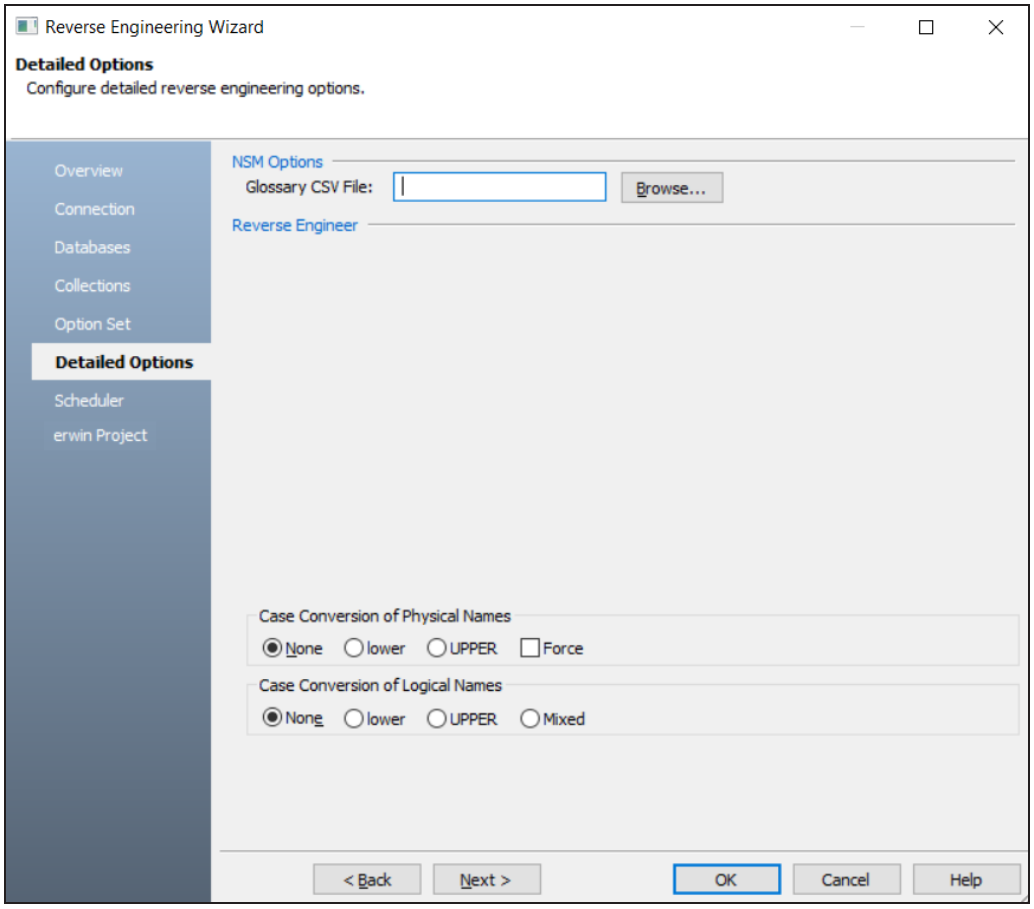
This moves the selected collections under Selected Collections.



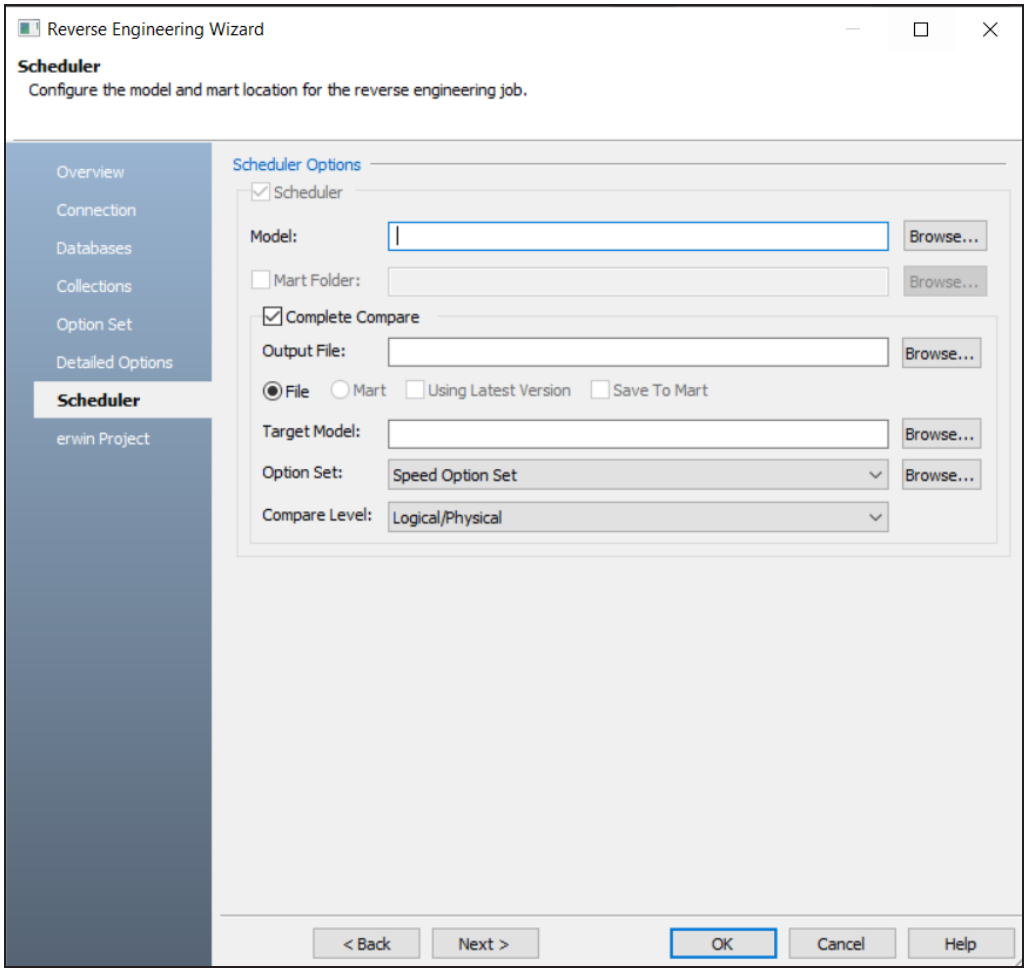
9. Click **Next**.
   The Option Set tab appears. It displays the default option set. You can either use the default or a custom option set.



10. Click **Next**.
    The Detailed Options tab appears. Set up appropriate options based on your requirement.



11. Click **Next**.
    The Scheduler tab appears.



12. Configure appropriate scheduler options. Refer the following table:

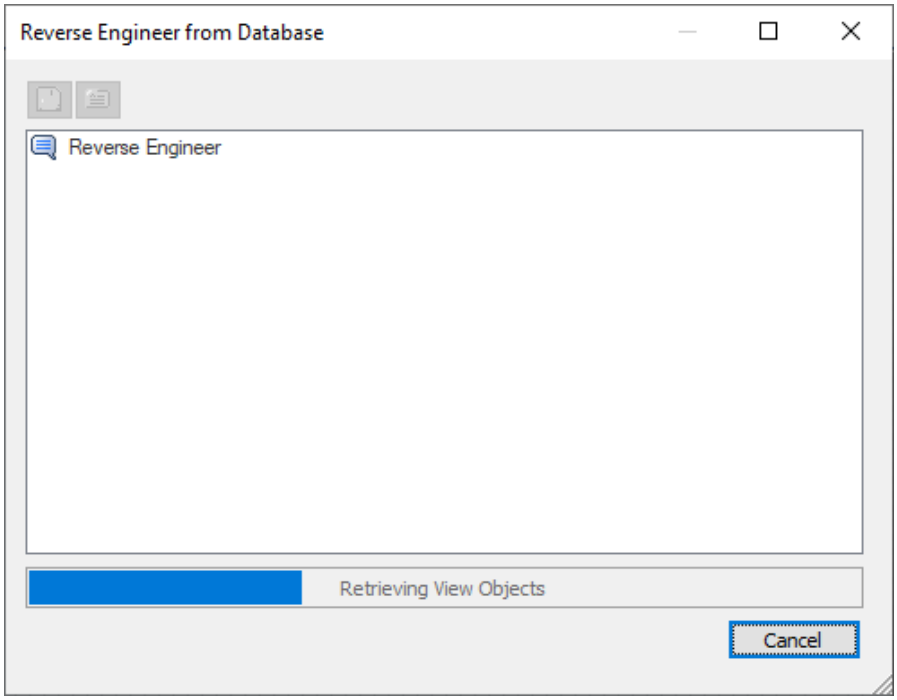
Parameter	Description	Additional Information
Model	Specifies the location and name of the reverse engineered model	For example: C:\Scheduler\<Model Name>.erwin When you schedule a job on a remote server, ensure the model path is same for remote and local server.
Mart Folder	Specifies the location or	To use this option, ensure that you are

Parameter	Description	Additional Information
	library in your mart where the reverse engineered model is saved	connected to a mart. For more information, refer to the Connecting to Mart topic.
Complete Compare	Specifies whether the Complete Compare (CC) process should run while reverse engineering	
Output File	Specifies the location of the CC output file generated	
File	Specifies that the target model location is on the local system	
Mart	Specifies that the target model location is in the mart	
Using Latest Version	Specifies whether the target model is the latest version of the model in the mart	This option is available only when Mart is selected.
Save To Mart	Specifies whether the reverse engineered model is saved to the mart	This option is available only when Using Latest Version is selected.
Target Model	Specifies the location of the target model for CC	

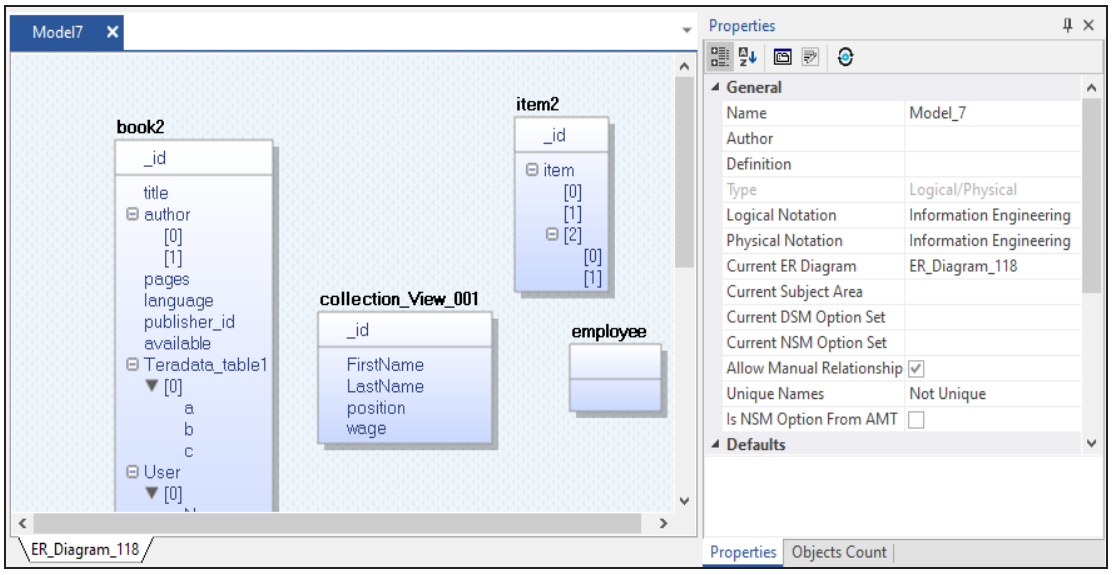
Parameter	Description	Additional Information
Option Set	Specifies the option set that is used for CC	**Advanced Default Option Set**: Indicates that all erwin DM metadata is included. CC works slowest with this option. **Speed Option Set**: Indicates that only the essential metadata is included. CC works the fastest with this option set. **Standard Default Option Set**: Indicates that standard metadata is included. CC works fast with this option set compared to the Advanced option set. In addition to the above options, click **Browse** to select a custom option set for complete compare.
Compare Level	Specifies the selection type for the compare	**Logical / Physical**: Compares all objects on the logical or physical level of a model **Logical**: Compares all objects on the logical level of a model **Physical**: Compares all objects on the physical level of a model **Database**: Compares all objects on the database level of a model

13. Click **OK**.

The reverse engineering process starts.



Once the process is complete, based on your selections, a schema is generated, and a model is created.

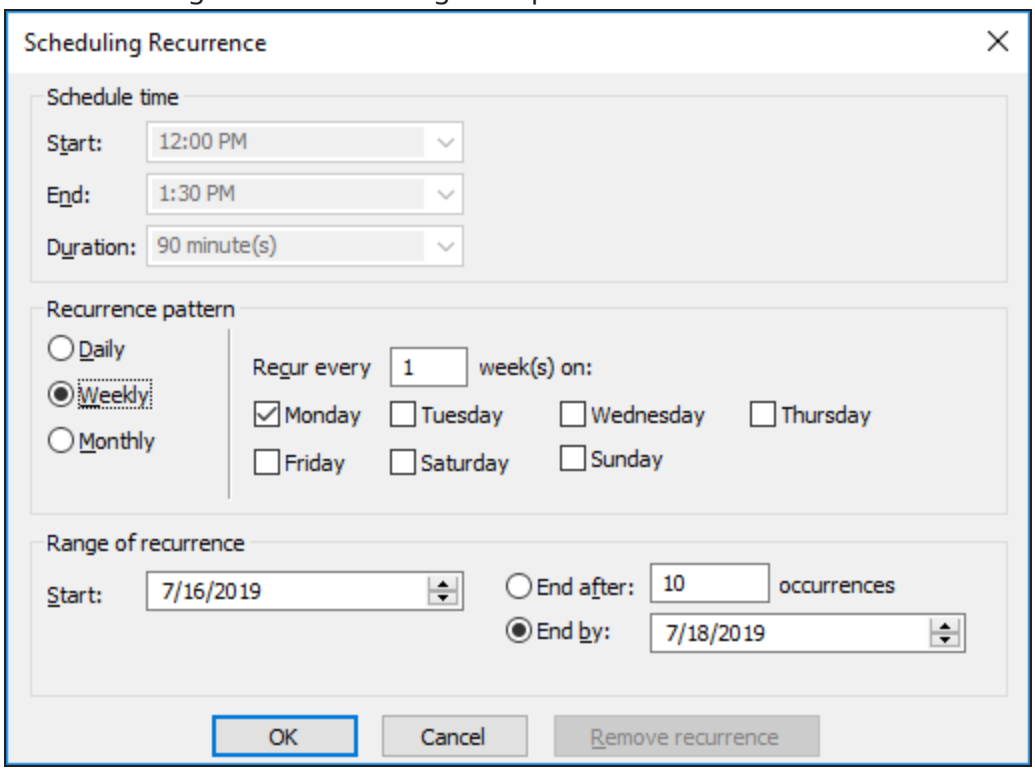


Setting Recurrence

You can set a recurrence schedule for reverse engineering (RE) jobs that you run repeatedly.

To set recurrence while scheduling a new RE job, follow these steps:

1. On the erwin DM Scheduler Event Details screen, click **Recurrence**.
   The Scheduling Recurrence dialog box opens.



2. Work with the following options:

Schedule time

By default, the time and duration that you set on the erwin DM Scheduler Event Details dialog box is set as the recurrence start and end time, and duration.

Recurrence pattern

Specifies whether the job should run daily, weekly, or monthly. Depending on the pattern that you select, further settings are available as follows:

- **Daily**: Set the day interval at which the job should run. Or, set it to run every workday. For example:
  - Run the job every 2 days.
  - Run the job every workday (Monday-Friday).

  > For the Daily-WorkDays combination to work, ensure that you have strictly set the workdays to Monday through Friday in Calendar Options. For more information on setting work days, refer to the Setting Calendar Options topic.

- **Weekly**: Select the weekly interval and the days of the weeks on which the job should run. For example, run the job every 2 weeks on Monday and Thursday.
- **Monthly**: Select the day of the month and the monthly interval at which the job should run. For example:
  - Run the job every second day, every two months.
  - Run the job second Thursday, every two months.

Range of recurrence

Set the start date of the recurrence. Also, set either the end date or the number of occurrences of the job that you want to run.

3. Click **OK**.

To set recurrence for an existing job that has been scheduled, follow these steps:

1. Right-click a job event and click **Properties**.
   The erwin DM Scheduler Event Details dialog box opens.
2. Click **Recurrence**.
   The Scheduling Recurrence dialog box opens.
3. Follow step 2 given above.

Stopping Recurrence

To stop recurrence for a job, follow these steps:

1. Right-click a job event and click **Properties**.
   The erwin DM Scheduler Event Details dialog box opens.
2. Click **Recurrence**.
   The Scheduling Recurrence dialog box opens.
3. Click **Remove recurrence**.

Connecting to Mart

You can save a reverse engineered model at a predefined location in your mart. However, to save a model to a mart, you need to be connected to it.

> Connecting to Mart On Cloud (With SSO user) using API is restricted.

For more information on saving a reverse engineered model to a predefined location on the mart, refer to the Setting Reverse Engineering Options topic.

> Ensure that you have configured and initialized erwin Mart Portal.

To connect to a mart, follow these steps:

1. On the ribbon, in the Mart group, click **Connect**.

   The Connect to Mart screen appears.

2. Work with following fields:

   Server Name

   Defines the name of the web server where you have installed the Mart.

   Port

   Specifies the port number to access the web server.

   Default: 18170

   Use SSL

   Specifies that you want to connect to the Mart through a secured connection. SSL lets you access the Mart through a secured connection. This check box is enabled only if you have configured SSL on your web server. For more information about configuring SSL, see the Implementation Guide (Workgroup Edition).

   Application Name

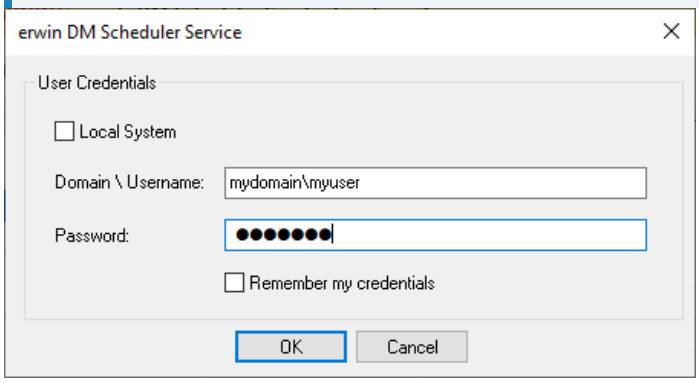
   Defines the application name of the Mart that you want to connect to.

   Default: MartPortal

   Authentication

Specifies the type of authentication you want to use. You can use a user name that is authenticated by the Mart Portal application.

If you are a non-administrator user, to be able to use Windows Authentication, ensure that you clear the Local System check box. Then, use your Windows <<Domain\Username>> and password to start the erwin DM Scheduler Service.



User Name

Defines the name of the user that has access to the Mart. If you are using a Windows-authenticated user name, enter it in the <domain name>/<user name> format.

A local Windows user who does not belong to a domain or who is not part of an Active Directory cannot log in to the Mart as a Windows user.

Password

Defines the password of the user.

A password should fulfill the following criteria:

- Contains at least 1 lowercase character
- Contains at least 1 uppercase character
- Contains at least 1 number
- Is minimum 6 characters in length
- Is maximum 130 characters in length

Apart from the above criteria, special characters are optional.

3. Click **Connect**.

   If you have selected Use SSL and the security certificate is installed, you are connected to the Mart.

   > After you connect to the Mart, if you click Connect to Model Manager again, a dialog opens seeking your permission to disconnect from the Mart.

   If your security certificate is not installed, a message, The certificate authority is invalid or incorrect, appears. You must install the security certificate to proceed.

   a. Click **OK** on the message.

      The SSL Certificate Install dialog opens.

   b. Click **Install**.

      The Certificate dialog opens.

   c. Click **Install Certificate**.

      The Certificate Import Wizard dialog opens.

   d. Click **Next**.

   e. Click the **Place all certificates in the following store option** button and click **Browse**.

   f. In the Select Certificate Store dialog, select **Trusted Root Certification Authorities** and click **OK**.

   g. Click **Finish**.

      The security certificate is installed and you are connected to the Mart.

Reading Job Status

The Scheduler indicates job status using several visual cues follows:

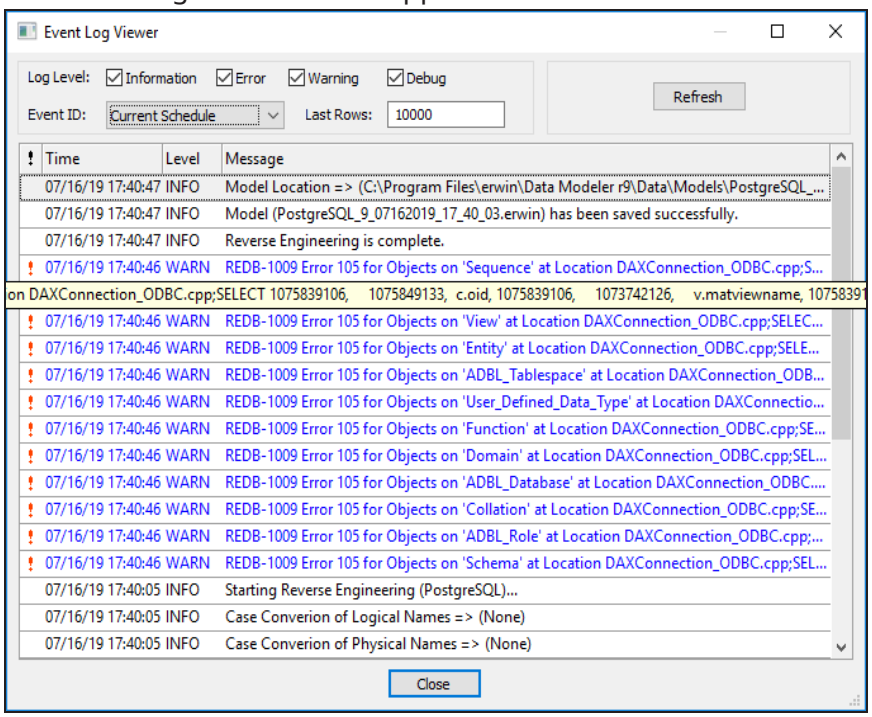
- When the job is running, its progress is indicated as approximate percentage of completion on the job event tile.
- Job schedule is indicated on the job event tile and on job event tooltips.
- Job status is indicated on job event tile and job event tooltips, and by a color code as follows:

Color Code	Description
	Indicates that the job is scheduled
	Indicates that the job is running
	Indicates that the job has been completed successfully
	Indicates that the job encountered an error

Viewing Event Log

The Scheduler generates an event log for each RE job that you run. To view the event log, follow these steps:

1. In the Calendar View, right-click a job event tile.
2. Click **Event log**.
   The Event Log Viewer screen appears.



   By default, it displays all types of messages for the current schedule. Work with the following fields to customize the event log.

   a. **Log Level**: Select or clear the message type check boxes to include or exclude certain message types.

   b. **Event ID**: Select whether you want to view the log for all events or the current schedule.

   c. **Last Rows**: Specify the number of latest rows of the event log that you want to display.

3. To regenerate the event log with any changes that you made, click **Refresh**.

Rescheduling, Editing, Copying, and Deleting Jobs

You can work on an existing job to reschedule, edit, copy, or delete it. Right-click a job and work on the following options:

- **Rerun Event**: Runs the job event again.
- **Copy Event**: Copies the job and its settings. You can then paste the copied job on the date and time of your choice.

  > You can copy only one job at a time.

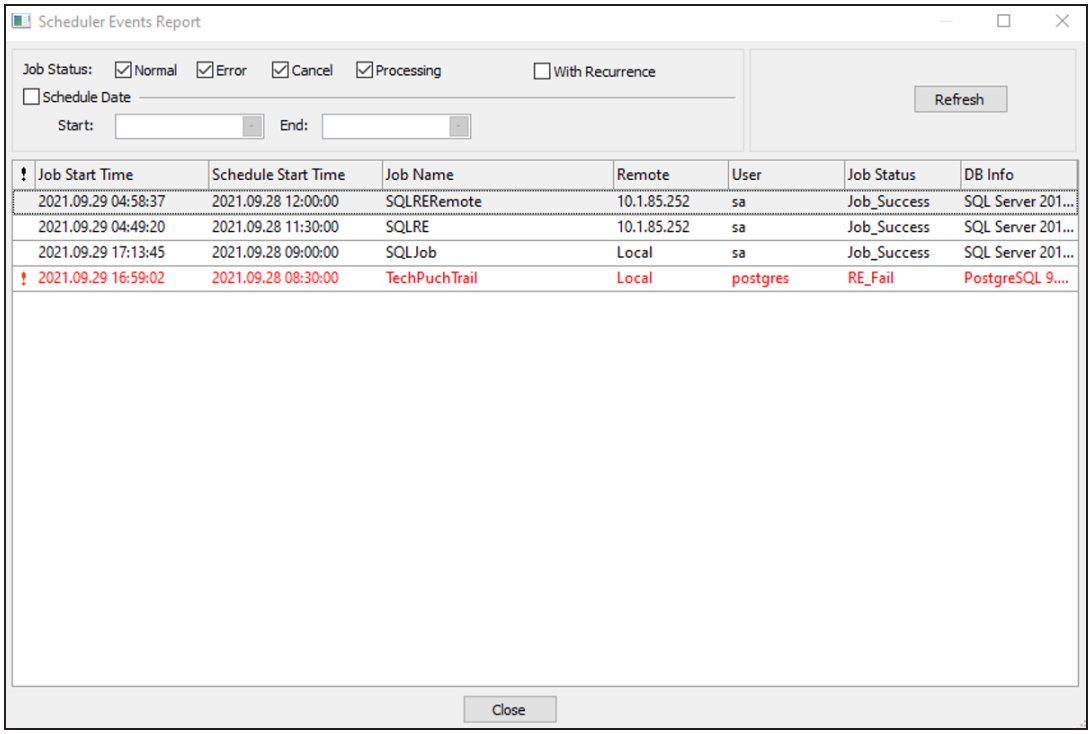
- **Cancel Event**: Cancels the job event and stops it from running.
- **Delete Event**: Deletes the job from the calendar
- **Event log**: Opens the Event Log Viewer screen. It displays the event log of the job. For more information, refer to the Viewing Event Log topic.
- **Properties**: Opens the erwin DM Scheduler Event Details screen. Edit the required settings. For more information, refer to the Scheduling Jobs topic.

Viewing Scheduler Events Report

The Scheduler generates an event log for each RE job that you run. To view the event log for all the jobs, follow these steps:

1. On the ribbon, click **Scheduler Events Report**.
   The Scheduler Events Report screen appears. It displays the list of jobs and their

status.



Use the following options to filter and view the event log:

- **Job Status**: Select one or more options to filter events log based on the job status. You can filter based on successful, failed, canceled, or jobs in progress, with or without recurrence.
- **Scheduled Date**: Select a date range to view event logs within start and end date.

Setting Up Remote Server Configurations

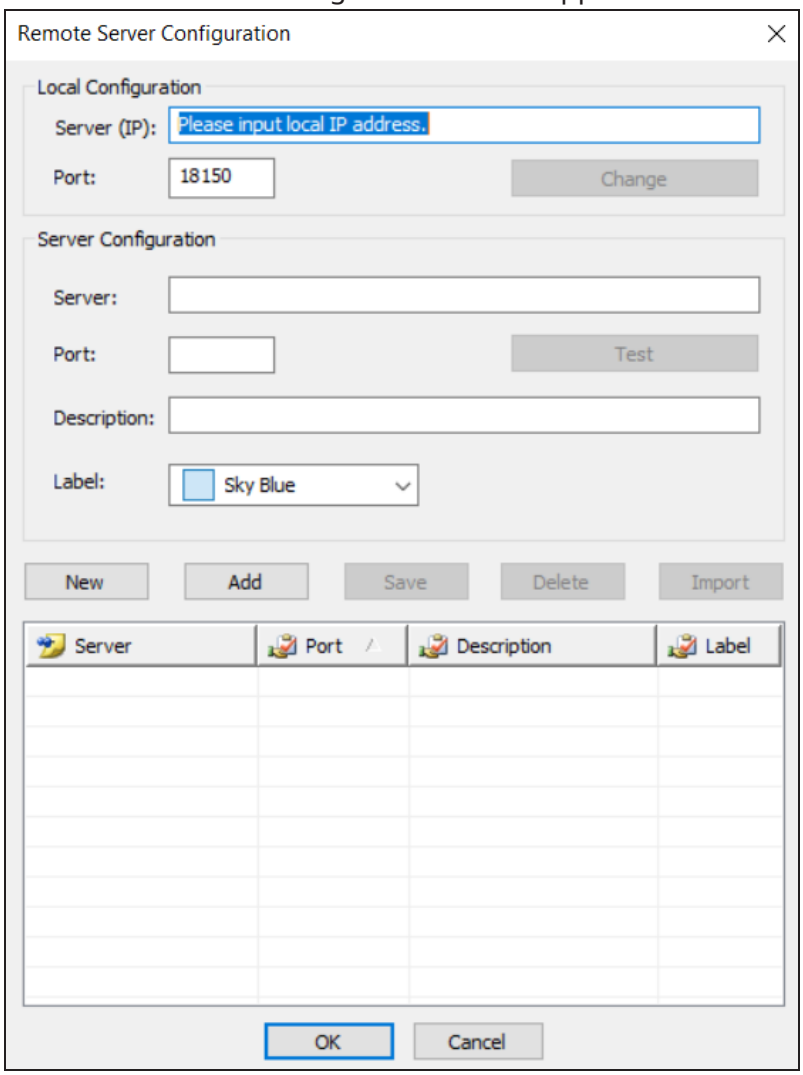
You can use erwin DM Scheduler to schedule reverse engineering (RE) jobs on a remote instance of erwin Data Modeler. You can configure multiple remote machines as servers and set up jobs to run in parallel on these servers. This saves time and provides you with an improved performance by distributing reverse engineering jobs across multiple servers.

To use remote servers to run RE jobs, ensure that:

- the remote server is running
- the remote server configuration is set up on your local Scheduler
- the local server configuration is set up on your remote Scheduler

To set up remote server configuration, follow these steps:

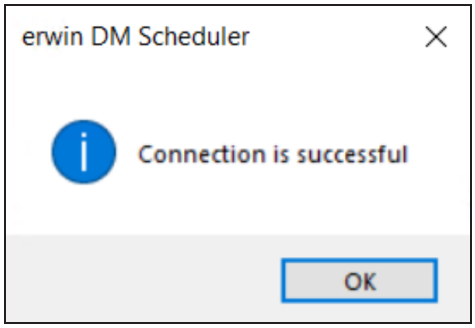
1. On the ribbon, go to **Remote** > **Remote Server Configuration**.
   The Remote Server Configuration screen appears.



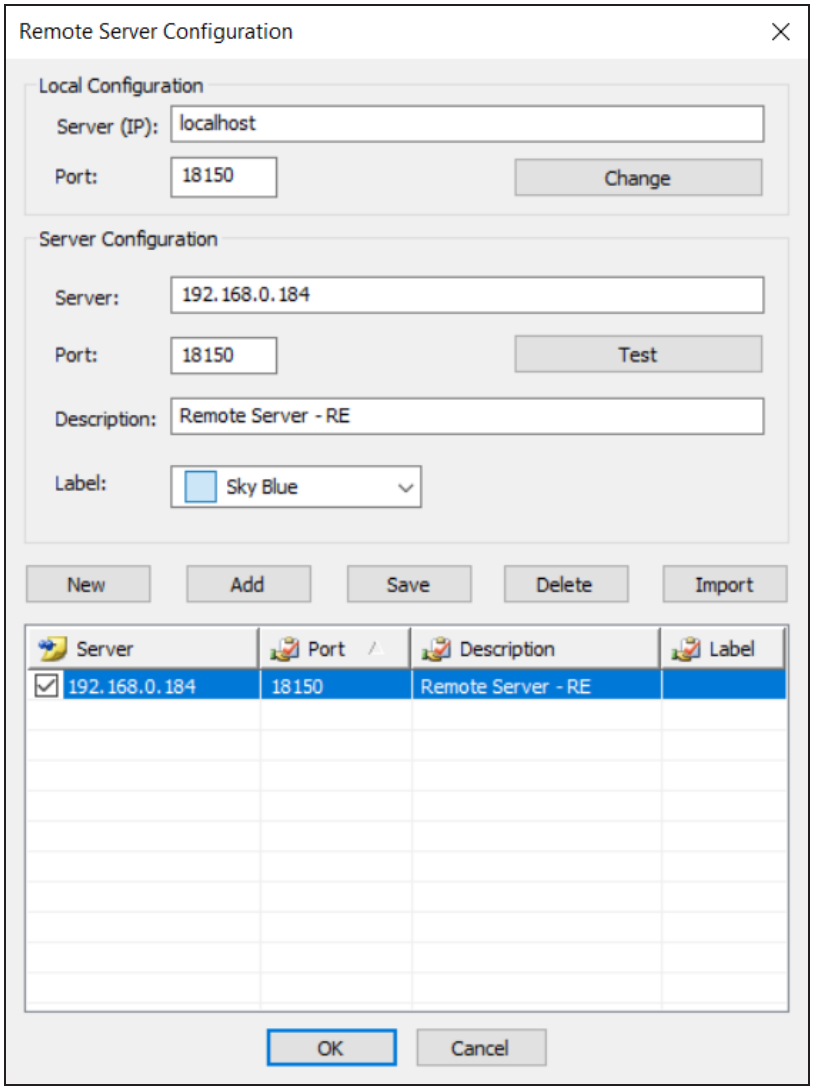
2. Configure the remote server based on your requirement. Refer to the following table for field descriptions.

Section	Option	Description
Local Configuration	Server (IP)	Specifies the IP address of the local host.
	Port	Specifies the service port number for the remote scheduler. This field displays the default port number. Click **Change** to update the port number.
Server Configuration	Server	Specifies the IP address of the remote server.
	Port	Specifies the port number for remote server. Ensure that the remote server is running before testing the connection.
	Description	Specifies the description for the remote server.
	Label	Specifies the label color to categorize the server configuration.

3. Once you have added remote server configuration, click **Test**.
   The erwin DM Scheduler screen appears on a successful connection.



4. Click **Add**.
   The remote server configuration is added to the list of remote servers.



Once you have set up a remote server configuration, use one of the following options:

- **New**: Use this option to set up another remote server. Selecting this option resets any information entered on the screen.
- **Save**: Use this option to save any changes to selected remote server configuration.
- **Delete**: Use this option to delete any selected remote server configurations.

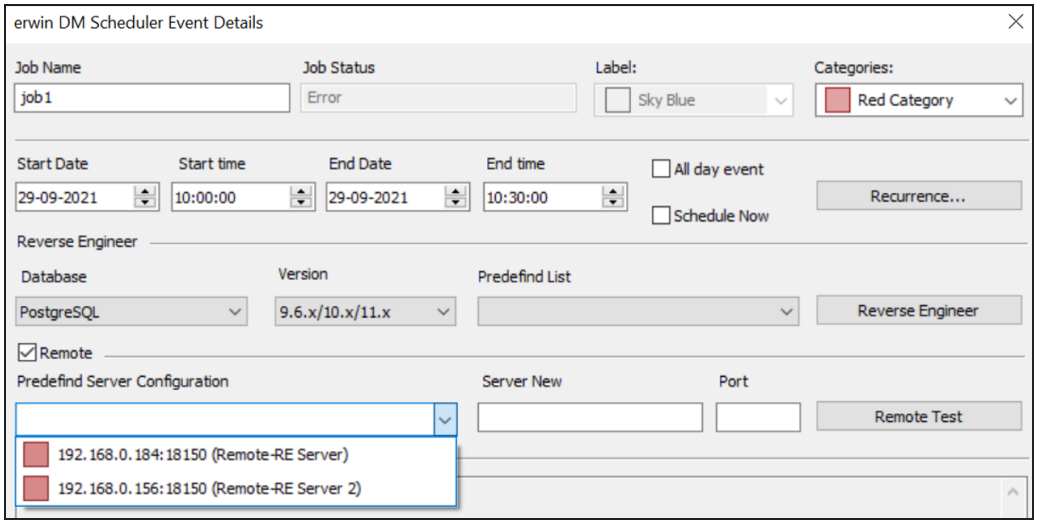
- **Import**: Use this option to import an existing remote server configuration. Select a server and click **Import**. This imports the This option is available when server information is configured under Server Configuration section.

  > The import replaces the existing server configuration with the latest configuration.

5. Once you have set up a remote server configuration, use one of the following options:
   - **New**: Use this option to set up another remote server. Selecting this option resets any information entered on the screen.
   - **Save**: Use this option to save any changes to selected remote server configuration.
   - **Delete**: Use this option to delete any selected remote server configurations.
   - **Import**: Use this option to import an existing remote server configuration. Select a server and click **Import**. This imports the remote server and replaces the existing remote server configurations.

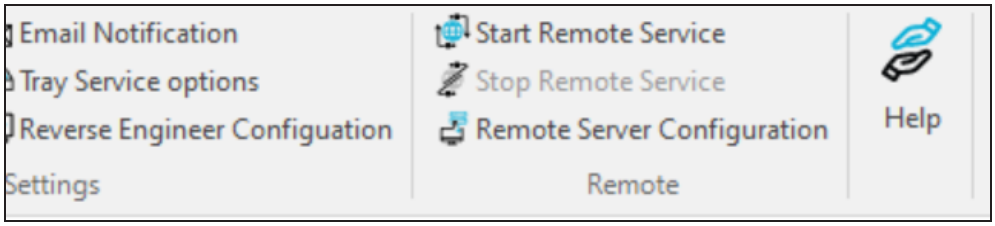
     > The import replaces the existing server configuration with the latest configuration.

   Click **OK**.
   Remote server configuration is saved and is available in the Predefined Server Configuration list on the erwin DM Scheduler Event Details screen.



Once you have set up remote servers, to use them, on the ribbon, in the Remote group, click either of the following options:

- **Start Remote Services**: Use this option start a remote service.
- **Stop Remote Services**: Use this option to stop a remote service.



Customizing and Configuring the Scheduler

The customization and configuration that you make in the scheduler lets you define Scheduler settings with respect to its appearance and behavior. To customize and configure the Scheduler, do one or more of the following:

- Customize the calendar view layout
- Set Calendar Options
- Set Time Scale and Time Zone
- Display or hide the Navigation pane (date picker)
- Set up email notifications
- Create and import reverse engineering configuration
- Setup tray service option

Customizing the Calendar View

To customize the calendar view, do the following:

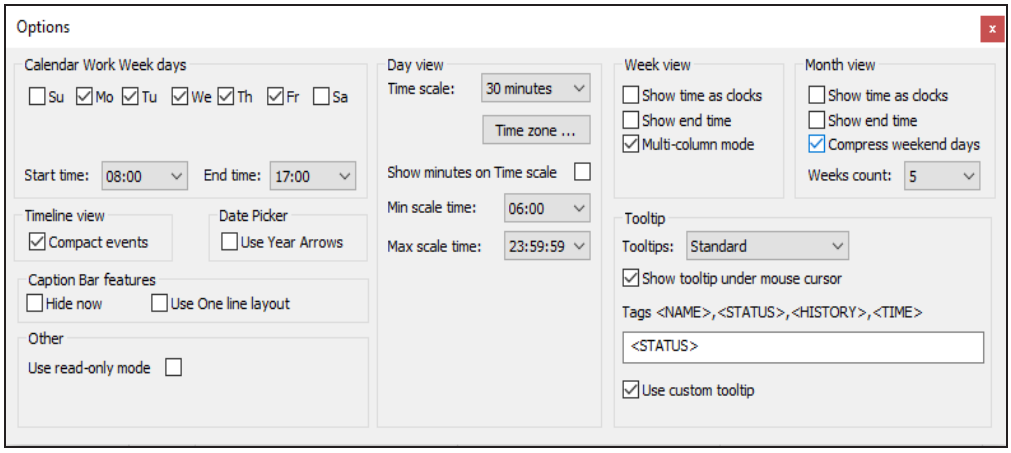
- On the ribbon, in the Arrange group, click one of the options given in the following table:

Option	Description
Day	Displays the day in the calendar view
Work Week	Displays only the work days of the week in the calendar view In Calendar Options, under Week view, if you clear the **Multi-column mode** check box, the Work Week setting defaults to Week mode.
Week	Displays the complete week in the calendar view
Month	Displays the current month in the calendar view
Schedule View	Displays the selected calendar and the schedule in the calendar view. This option is useful while comparing two or more calendars.

Setting Calendar Options

To set calendar options,

- On the ribbon, in the Settings group, click **Calendar Options**. The Options dialog box opens.



Work on the options given in the following table:

Section	Option	Description
Calendar Work Week days		Select the days that form the work week and set the start and end time of a work day.
Timeline view	Compact Events	Specify whether the timeline displays events in a compact layout. This setting is applicable to the Schedule View of the calendar view.
Date Picker	Use Year Arrows	Specify whether the navigation pane (date picker) displays ways to navigate the year.

Section	Option	Description
Caption Bar features		Set the appearance of Calendar view's caption bar.
	Hide now	Specify whether the caption bar is hidden.
	Use One line layout	Set the width of the caption bar to a single line.
Other	Use read-only mode	Specify whether job properties are editable.
Day view		Set the appearance of the Day view of the calendar.
	Time scale	Set calendar view's time interval.
	Time zone	Set default time zone to be used. Also, you can set an additional time zone.
	Show minutes on Time scale	Specify whether the time scale displays minutes on it. This setting takes effect only when you set the time scale to less than 30 minutes.
	Min scale time	Set the time at which the time scale begins.
	Max scale time	Set the time at which the time scale ends.
Week view		Set the appearance of the Week view of the calendar.
	Show time as clocks	Specify whether a clock icon is used to display job times. This option works only when the Multi-column Mode is not selected.

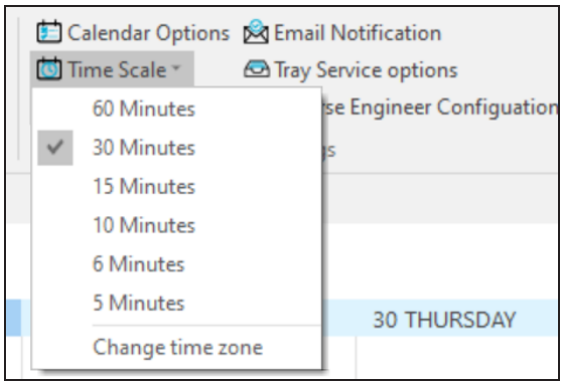
Section	Option	Description
	Show end time	Specify whether the job tile displays the job end time. This option works only when the Multi-column Mode is not selected.
	Multi-column mode	Specify whether the calendar view displays days in columns or tiles.
Month view		Set the appearance of the Month view of the calendar.
	Show time as clocks	Specify whether a clock icon is used to display job times.
	Show end time	Specify whether the job tile displays the job end time.
	Compress weekend days	Specify whether the weekend days are displayed in a single column.
	Weeks count	Set the number of weeks that the calendar view displays.

Section	Option	Description
Tooltip		Specify tooltip settings.
	Tooltips	Select the type of tooltip. ▪ **Standard**: Displays job times, job name, job status, and job execution time ▪ **Custom**: Displays the event ID, job times, and job name. This tooltip type overrides all the other tooltip settings. ▪ **Disabled**: Disables the tooltip
	Show tool-tip under mouse cursor	Specify whether the tooltip is displayed under the mouse cursor.
	Tags	Specify the items (tags) that are displayed in case of custom tooltips. Due to a limitation from a third-party component, the keyboard shortcuts to cut, copy, and paste text do not work in this field.
	Use custom tooltip	Specify whether the custom tooltip set in the Tag field should be used.

Setting Time Scale and Time Zone

To set the Time Scale, do one of the following:

- **Using the ribbon**:
  - On the ribbon, in the Settings group, click **Time Scale** and select a time interval.

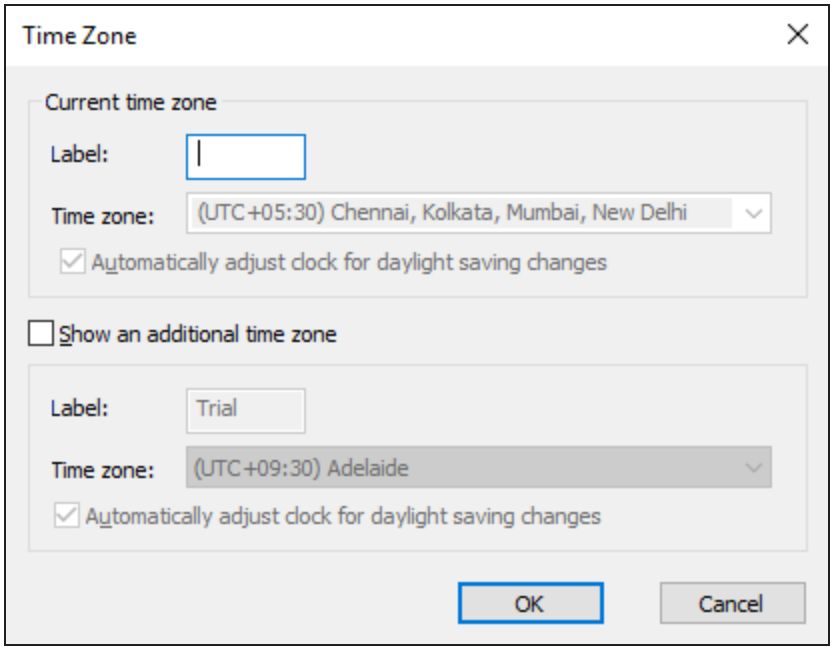


- **Using Calendar Options**:
  - On the ribbon, in the Settings group, click **Calendar Options**. The Options dialog box opens.
  - Under Day view, select the time interval. For more information, refer to the Setting Calendar Options topic.

By default, the current time zone is set according to your current location. However, you can set an additional time zone. To do that, do the following:

1. On the ribbon, in the Settings group, click one of the following:
   - **Calendar Options** > **Time zone**
   - **Time Scale** > **Change time zone**

   The Time Zone dialog box opens. You can set a label to the current time zone



2. Select **Show an additional time zone**.
3. Set a label to the additional time zone.
4. From the **Time zone** drop-down list, select a time zone.
5. Click **OK**.

Displaying the Data Picker

To display or hide navigation pane (date picker), do the following:

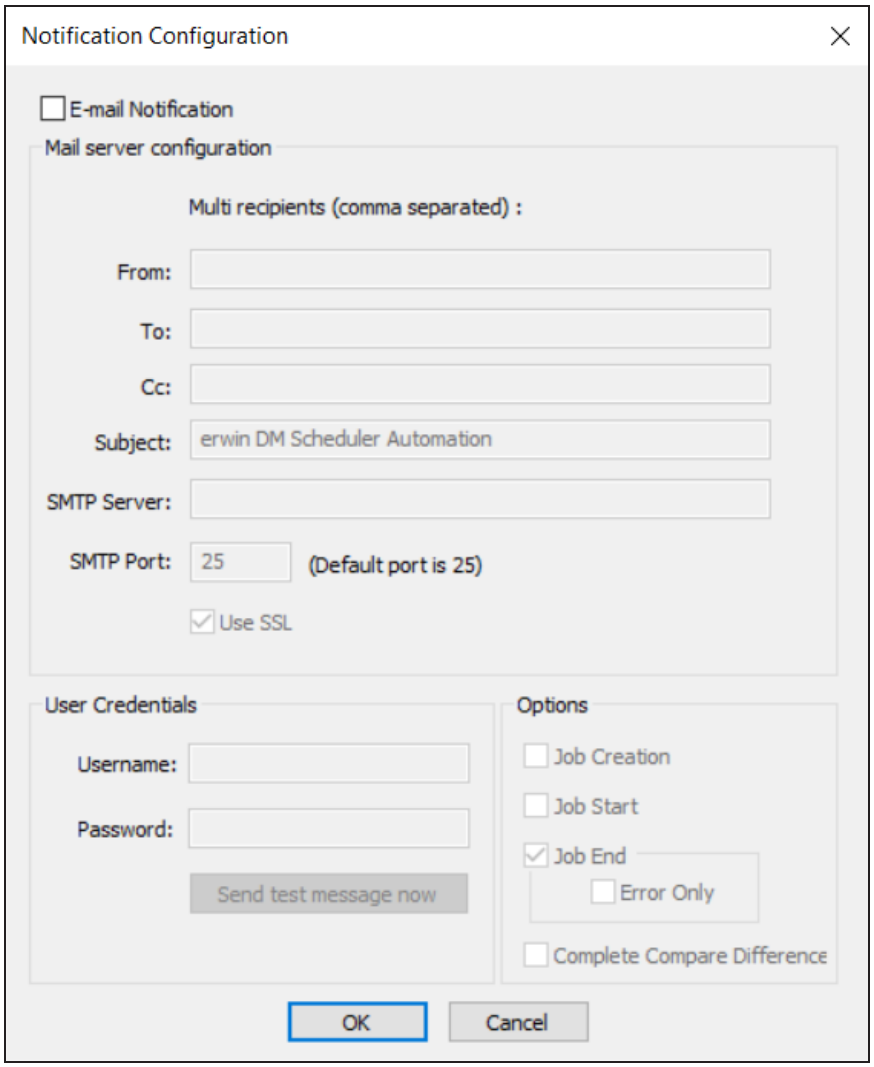
- On the ribbon, in the Settings group, click **Date Picker**. This setting is a toggle control that displays or hides the navigation pane (date picker) depending on its current state.

Setting up Email Notifications

To set up email notifications, do the following:

1. On the ribbon, in the Settings group, click **Email Notification**.

   The Notification Configuration dialog box opens.



2. Select the **E-mail Notification** check box.
   The fields on the dialog box are enabled.

> Before you configure and send email notifications, ensure that the SendMail.ps1 file is available in the Config folder at C:\Program Files\erwin\Data Modeler r9\.

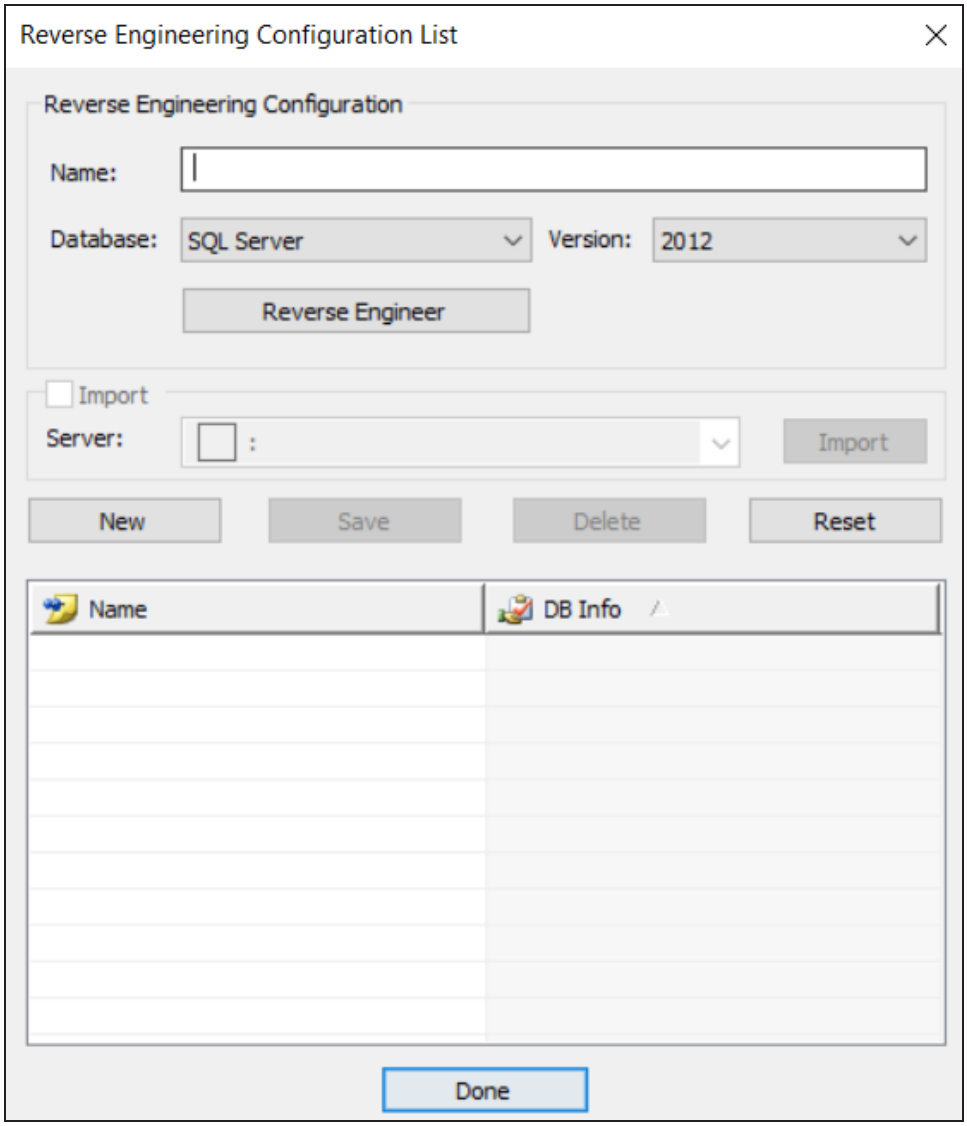
3. In the Mail Server Configuration section, work on the following:
   - **From**: Add an email address. Emails are sent to the user from the mentioned email address.
   - **To and CC**: Add an email address or a list of comma-separated email addresses.
   - **Subject**: Enter a notification subject. By default, it is set to erwin DM Scheduler Automation.
   - **SMTP Server**: Enter your SMTP server name in the mail.domain.com format. Notification emails are sent from this server.
   - **SMTP Port**: Enter the port number of your SMTP server. The default port number is 25. If your organization uses an alternate port number for the mail server, enter the port number.
   - **Use SSL**: Specify whether you want to connect to the server through a secured connection. This check box is enabled only if you have configured SSL on your web server.
4. In the User Credentials section, work on the following:
   - **Username**: Enter the username or email address of the account that you want to use to send notifications. Ensure that this account has the rights to send emails in a batch.
   - **Password**: Enter the password of your account.
   - **Send test message now**: Click Send test message now to verify the settings that you made.
5. In the Options section, select the event that triggers an email notification. You can send notifications on job creation, job start, job end, job end due to an error, and the difference generated during complete compare.
6. Click **OK**.

Setting Predefined Reverse Engineering Options

You can create or import database reverse engineering configurations and use that configuration as a predefined configuration for scheduling a job. Access these predefined list on the erwin DM Scheduler Event Details page.

To create a reverse engineering configuration, follow these steps:

1. On the ribbon, go to **Settings** > **Reverse Engineer Configuration**.
   The Reverse Engineer Configuration List appears.



2. On the Reverse Engineer Configuration List, use the following options in the below table to create or import configurations.

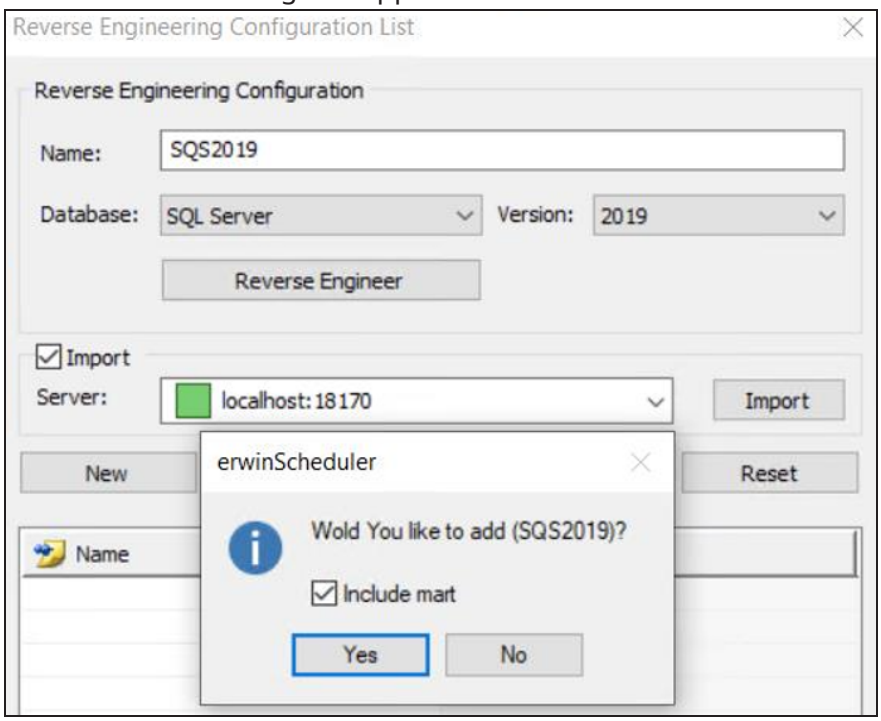
Option	Description
Name	Enter a name for the configuration.
Database	Select a database type for reverse engineering.

Option	Description
Version	Select a relevant database version for reverse engineering.
Reverse Engineer	Select this option to specify database options for reverse engineering. The Reverse Engineering Wizard appears. On the Reverse Engineering Wizard, click **Connections** to set up database connections. For more information on database specific connection parameters, refer to the Database Connection Parameters topic. > You can also configure the reverse engineering options available on the wizard. For more information, refer to the Setting Reverse Engineering Options topic.
Import	Select this option to import configurations saved in a Mart Portal. > This option is available only when the Mart Portal is connected. To connect to a Mart Portal, refer to the Connecting to Mart topic.
Server	This displays the Mart Portal that you are connected to. Then, click **Import** to import the saved reverse engineering configuration from Mart. The imported configurations are displayed in the configuration list.

3. Once you have created a configuration, on the Reverse Engineering Configuration List, use one of the following options:
   - **New**: Use this option to create a new reverse engineering configuration. Selecting this option resets the Reverse Engineering Configuration section to add a new one.
   - **Save**: Use this option to save the changes to a selected configuration on the list.
   - **Delete**: Use this option to delete the selected configurations on the list.

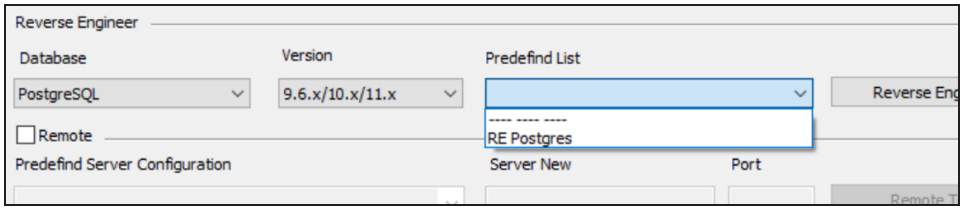
- **Reset**: Use this option to reset the data in the Reverse Engineer Configuration section.

When you add or delete a reverse engineering configuration in the list, the erwinScheduler dialog box appears.



You can choose to add or delete these configurations in the connected Mart Portal as well. Select the **Include mart** check box to update the configuration changes to Mart and local. Alternatively, clear the **Include mart** check box to save the configuration changes locally.

4. Click **Done**.
   The reverse engineering configurations are saved as predefined configurations. When you schedule a job, you can select this configuration under **Predefined List** on the erwin DM Scheduler Event Details page.

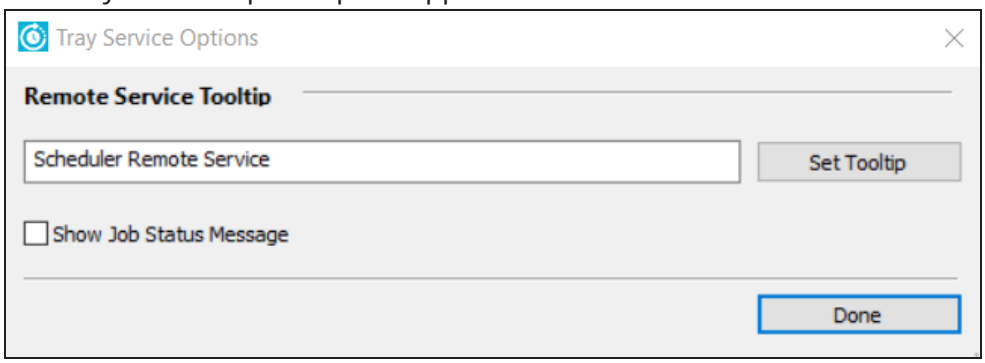


Setting Tray Service Options

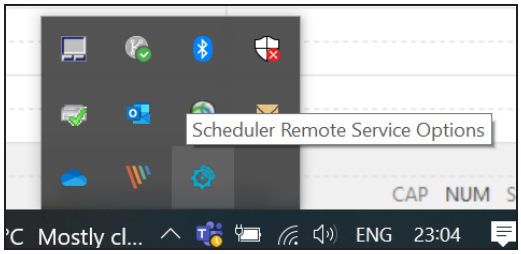
You can set up custom tooltip name, notification balloon title, and message for your machine using the Tray Service Options pane. The tray service options are applicable for reverse engineering from remote sever connection. Also, ensure the remote service is started to receive system notifications.

To set up tray service options, follow these steps:

1. On the ribbon, in the Settings group, click **Tray Service Options**.
   The Tray Service Options pane appears.



2. Under the Remote Service Tooltip section, enter a tooltip name for the remote service icon.
3. Click **Set Tooltip**.
   This sets the new tooltip name for the remote service icon.
   On the Overflow (Show hidden icons) section of the windows taskbar, hover over the remote service icon to view the updated tooltip.



4. Select **Show Job Status Message** option to display the message content in the windows notification.
5. Click **Done**.
   The tray service options are saved. The windows notification message appears based

on the above configuration.

> The tray service options and notifications are available for remote server configurations. For more information on configuring a remote server, refer to the Setting Up Remote Server Configurations topic.

See the below screenshot for a notification message example.