erwin Data Modeler

Scheduler

Release 12.0

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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 work day. 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.

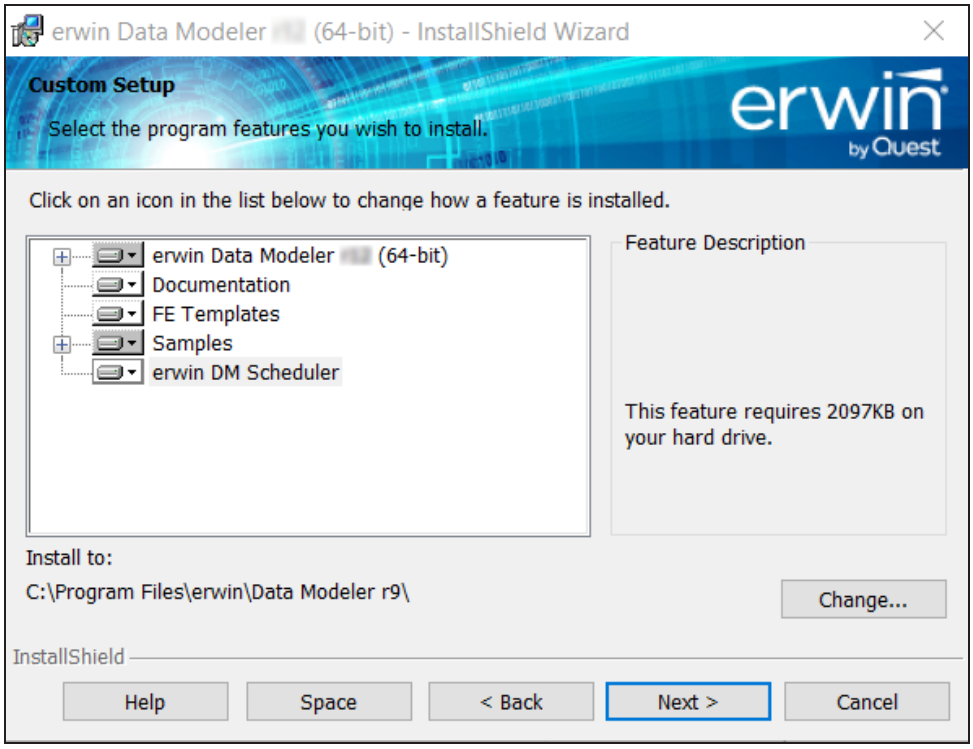
Installing erwin DM Scheduler

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

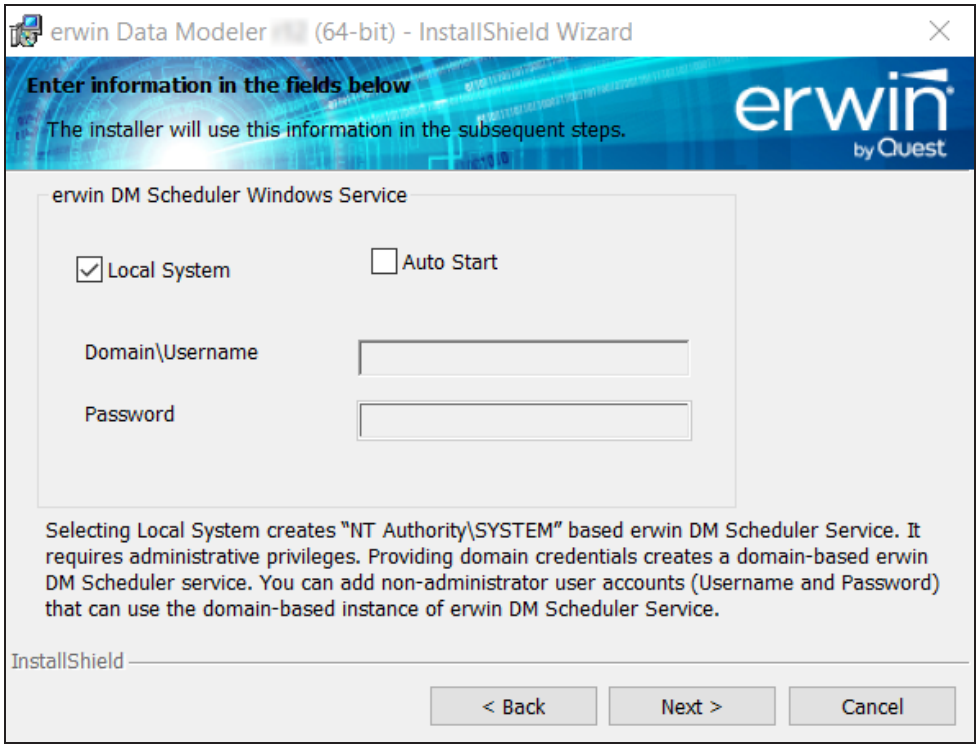
> Installing erwin DM Scheduler installs Windows Resource Kit Tools. It is not a prerequisite, and you can uninstall it without affecting erwin DM Scheduler's function. However, this set of tools assists you to manage issues in permissions and security for erwin DM Scheduler. It helps you troubleshoot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

Follow these steps to install erwin DM Scheduler:

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



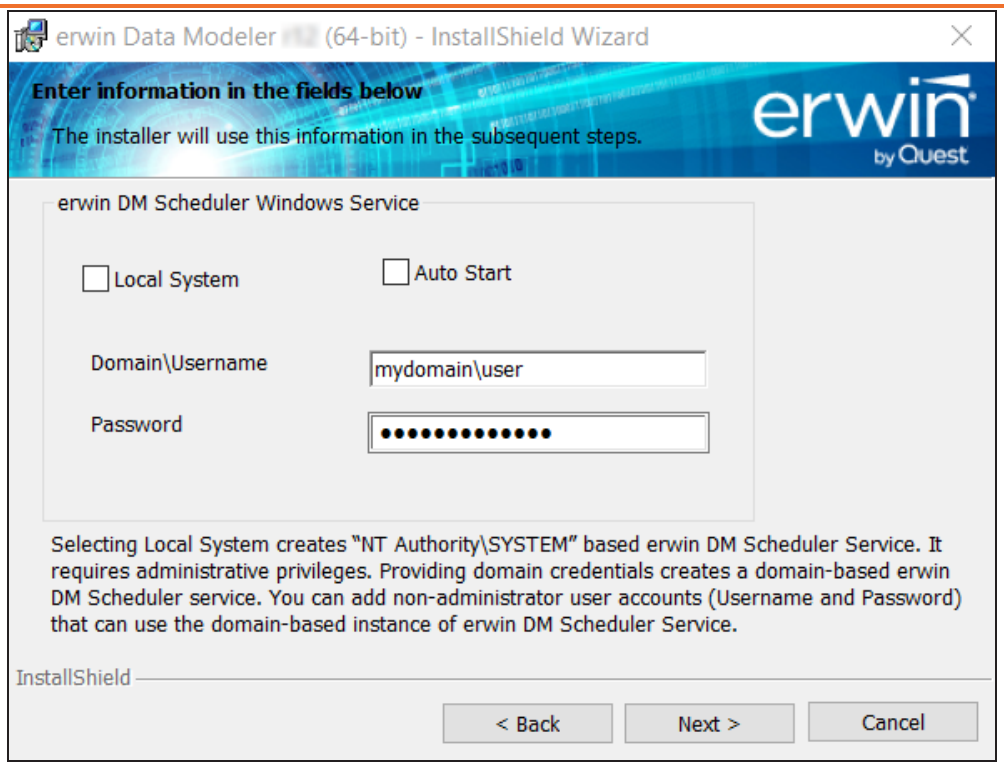
2. Select the type of erwin DM Scheduler Service that you want to create.



You may choose to create a local administrator user-based service or a domain-based non-administrator service.

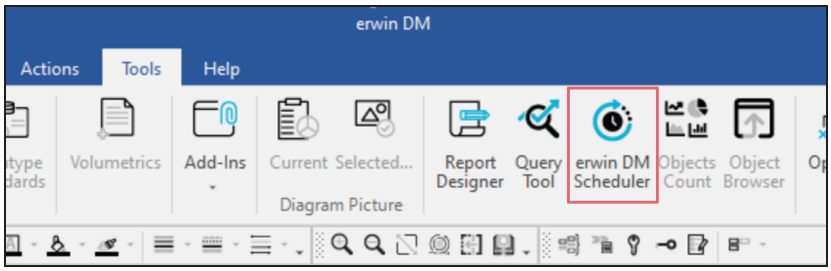
For a non-administrator user, ensure that you do not select the Local System check-box.

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.



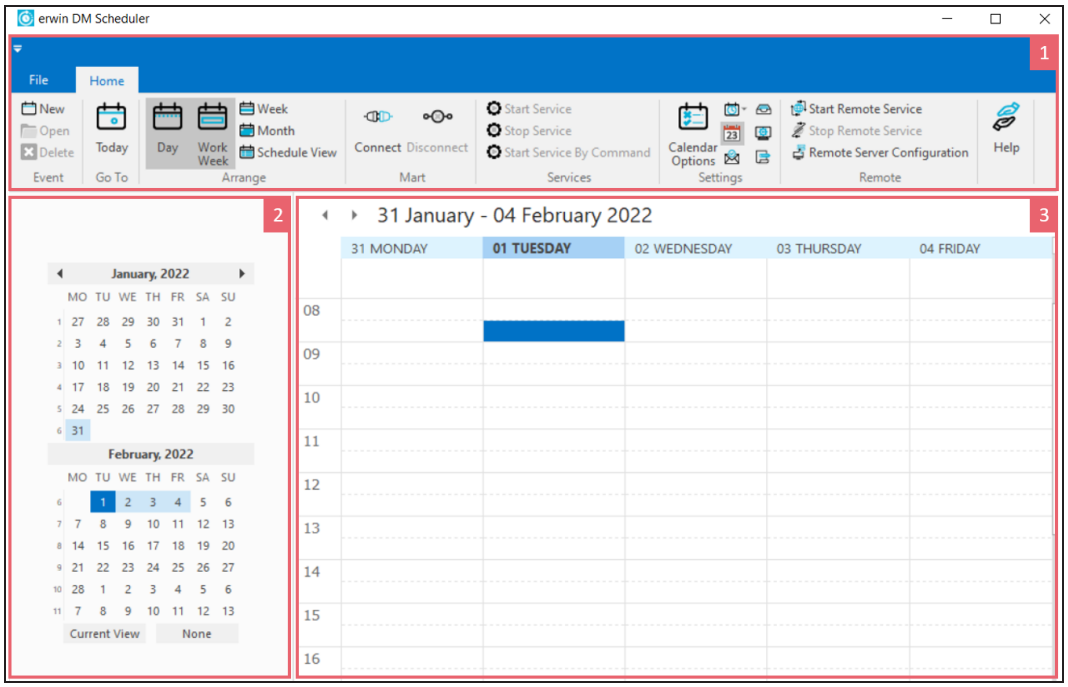
Getting Started

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

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

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 remote server
- Set recurrence
- Reschedule, copy, and delete jobs
- Set up predefined reverse engineering options
- 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.

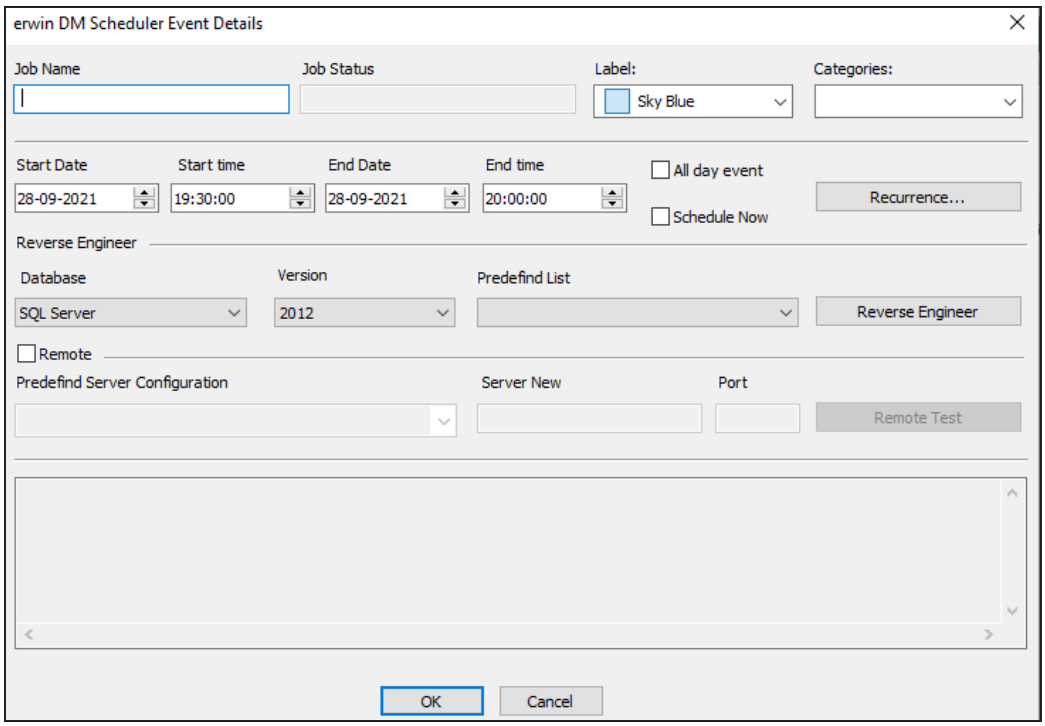
Before scheduling a job, ensure that you do the following:

- For a local job, start the scheduler service. To start the service, on the ribbon, go to **Home** > **Services**. Then, click **Start Service**.
- For a job on a remote server, start both, scheduler service and remote service. To start a remote service, on the ribbon, go tor the **Home** > **Remote**. Then, click **Start Remote Service**.

To schedule reverse engineering (RE) jobs, do the following:

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 dialogue box appears.



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

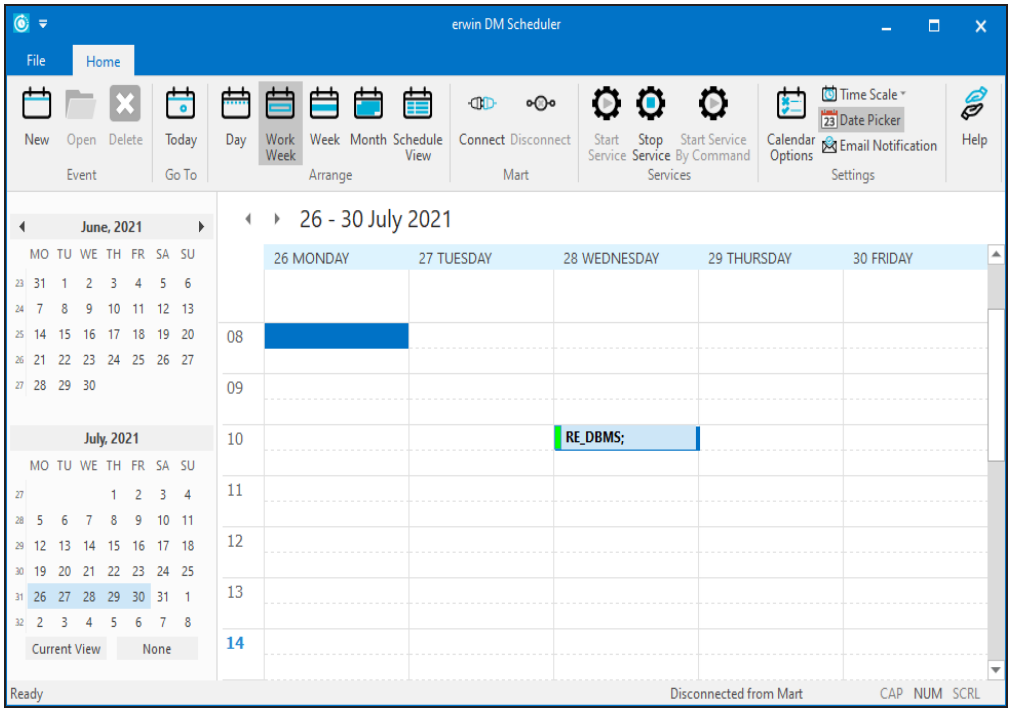
Option	Description	Additional Information
Job Name	Specifies the name of the job	
Job Status	Displays the status of the job	
Label	Specifies the color of the job label	
Start Date	Specifies the start date of the job	▪ Jobs are run serially. Hence, schedule a reasonable job duration. Ensure that you consider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

Option	Description	Additional Information
		new job accordingly. ▪ Also, in case of multiple jobs scheduled at the same time with the Schedule Now option, it 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 to schedule the job 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 right away.
Recurrence	Specifies job recurrence options	This option opens the Scheduling Recurrence dialog box where you can configure recurrence for repetitive jobs.
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.

Option	Description	Additional Information
		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 predefined list of reverse engineering options	For more information, refer to the Setting 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 to use a remote server for reverse engineering	
Predefined Server Configuration	Displays the lists of predefined remote servers for reverse engineering	For more information, refer to the Setting Predefined Reverse Engineering Options topic.
Server New	Specifies the address of the	

Option	Description	Additional Information
	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:

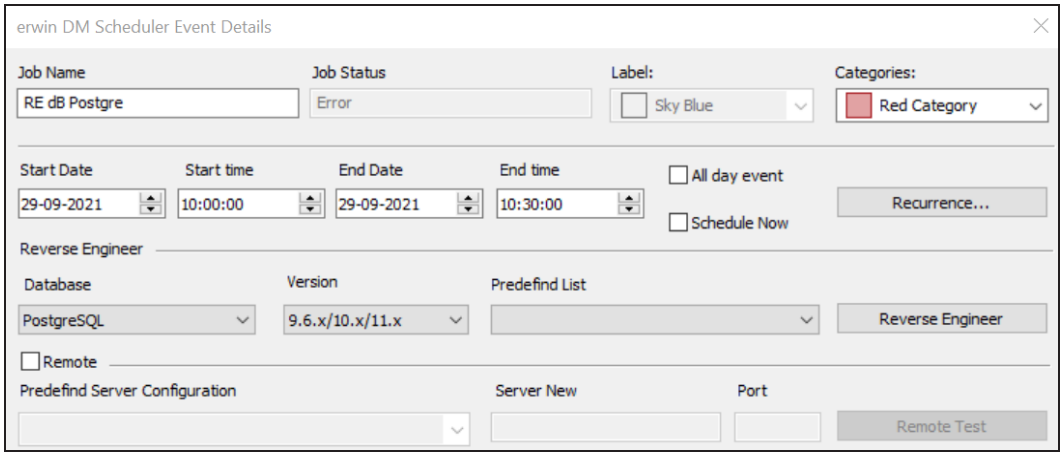
- Name
- Status

- Start and end times
- Run time

Setting Reverse Engineering Options

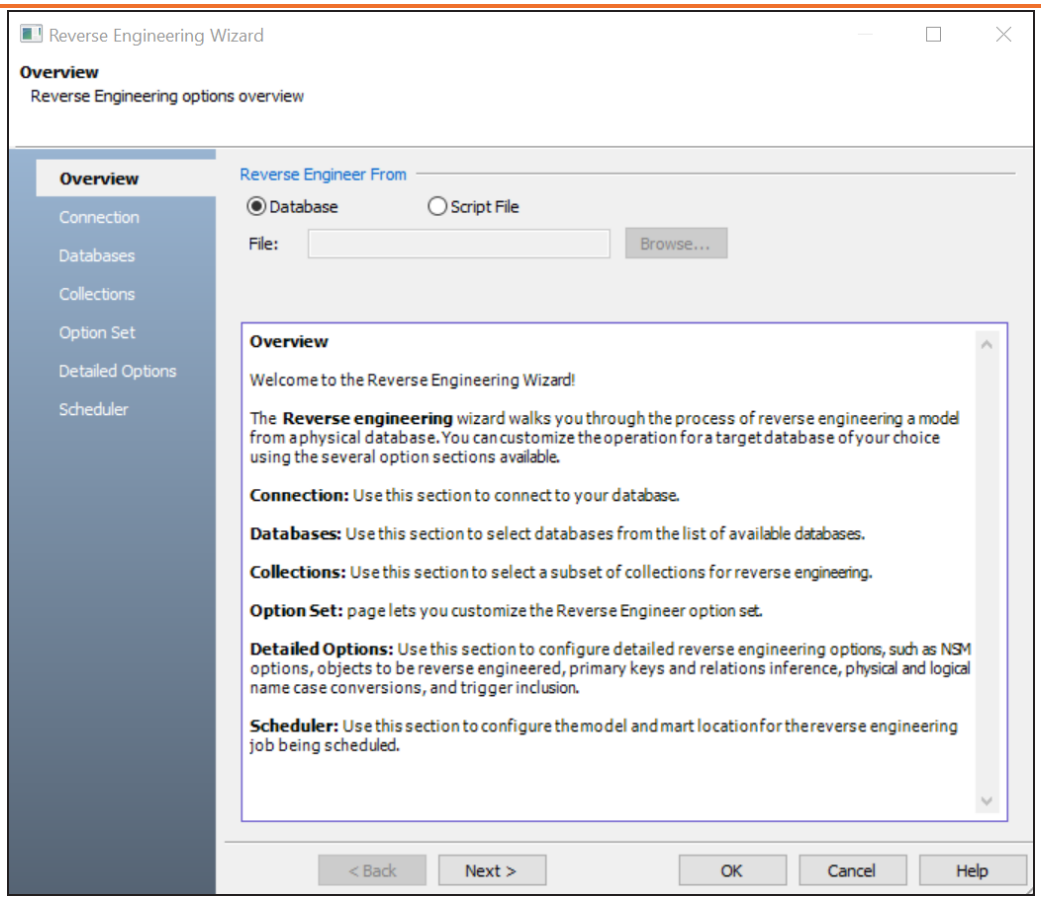
This topic walks you through the steps to connect to a database and reverse engineer a MongoDB model as an example. Similarly, you can connect to any database for scheduling a reverse engineering job based on your requirements. For more information on database specific connection parameter options, refer to Database Connection Parameters topic. For database-specific reverse engineering options, refer to the Reverse Engineering Options for Databases section.

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



To connect and reverse engineer a model:

1. On the Reverse Engineering Wizard, click **Next**.
   The Connection section appears.

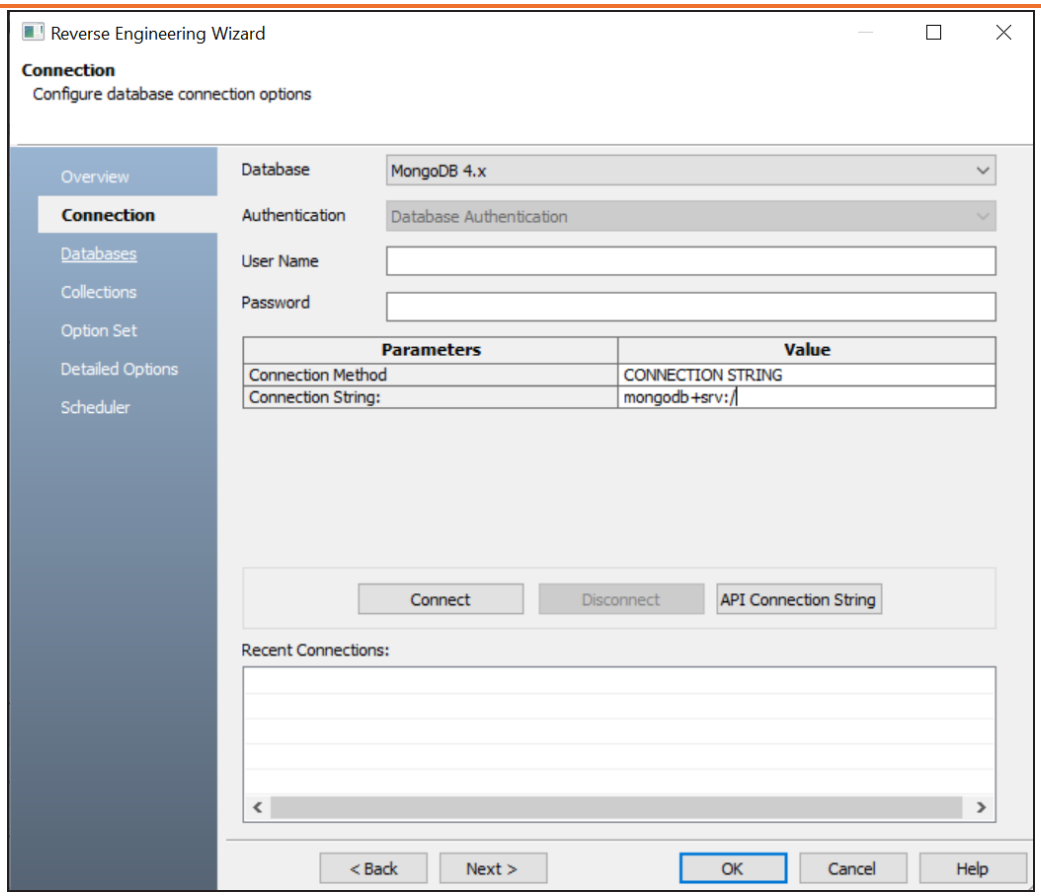


2. On the Connection section, use the available options to connect to the database for reverse engineering models.

   You can connect to the database directly or using a connection string. Similarly, for other database types, you can use JDBC, ODBC, or other connection methods based on your requirement.

   For more information, refer to the Database Connection Parameters topic.

   In the following image, for example, the connection is being established using a connection string.

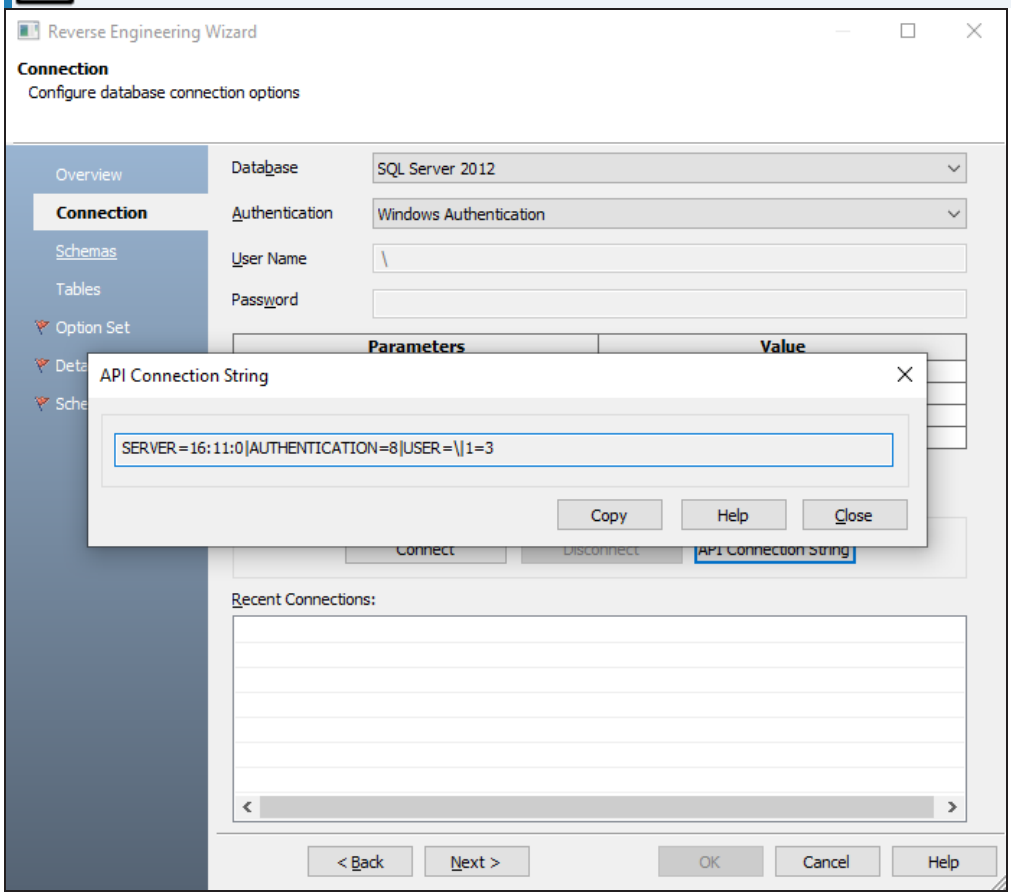


3. Click **Connect**.

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

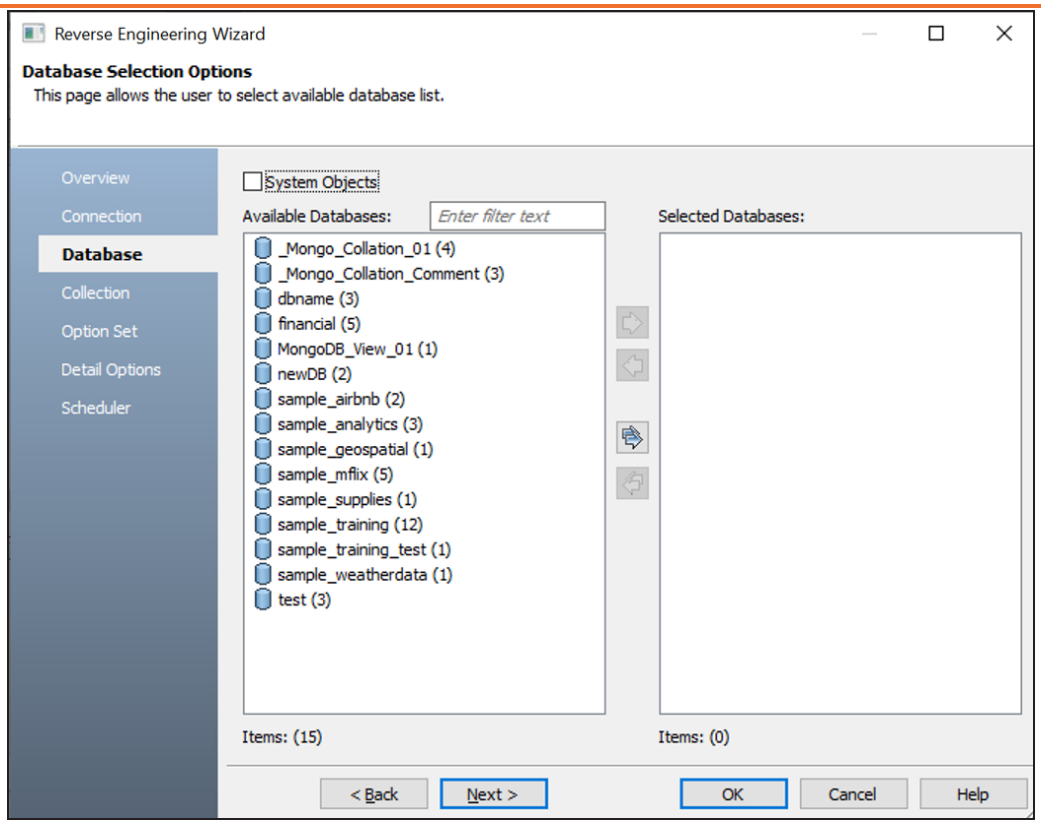
> On the **Connection** tab of the Reverse Engineering Wizard, use the **API Connection String** button to get the API connection string for your database. For more information, refer to the ISCPer-

sistenceUnit::ReverseEngineer topic in the API Reference.

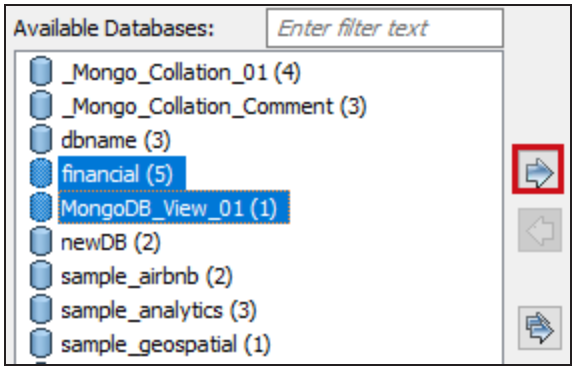


4. Similarly, you can set up other reverse engineering options using this wizard. Click **Next** to setup other reverse engineering options, or click **OK** to exit and continue with scheduling a job. The available options differ based on your database.

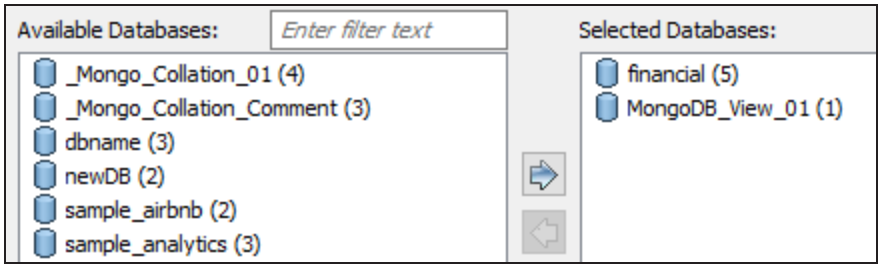
   The Database section appears. It displays a list of available databases. Similarly, for other databases, it displays database specific section for object selection.



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



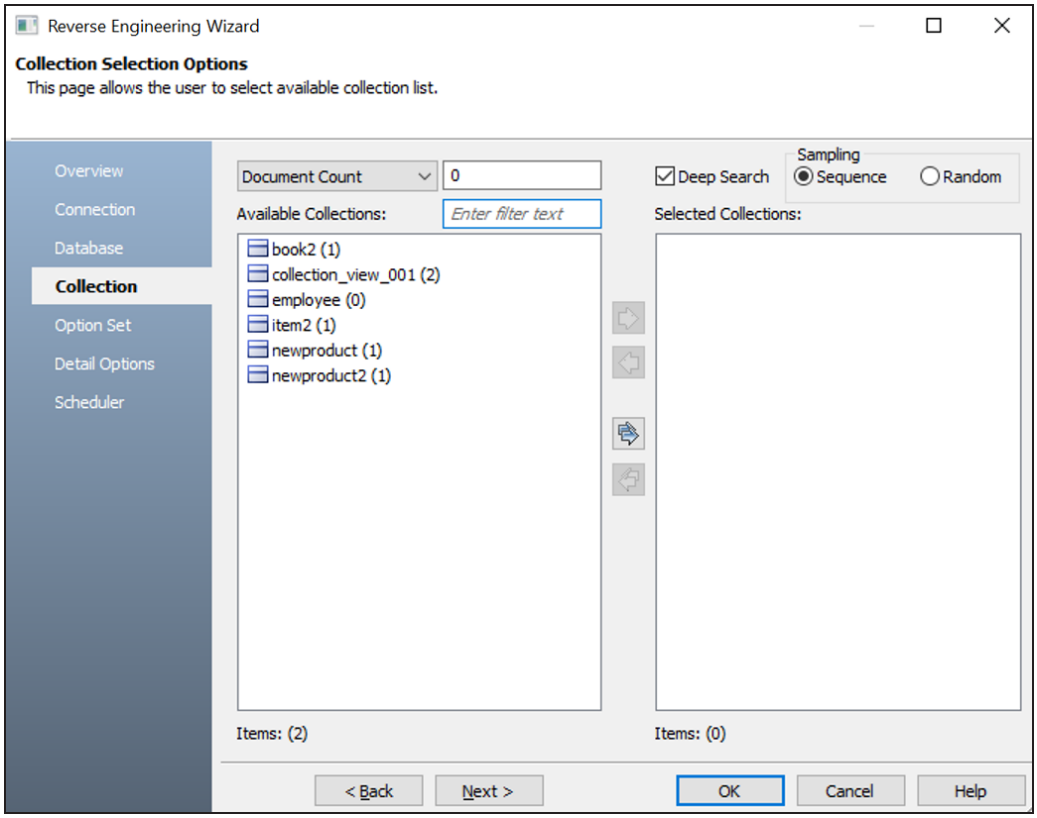
This moves the selected databases under Selected Databases.



6. Click **Next**.

   The Collection section appears. It displays a list of available collections in the databases that you selected in step 8.

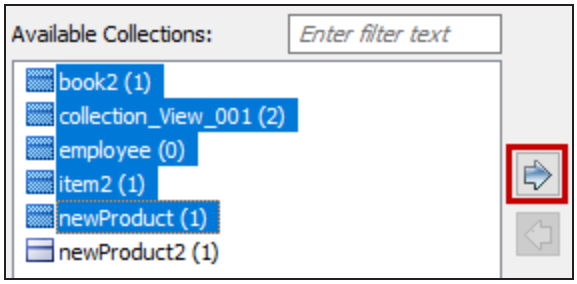
   Similarly, for other databases, it displays database specific section for object selection.



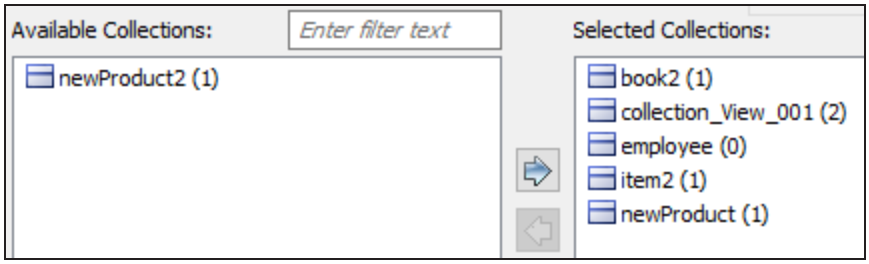
7. Use the following options:

- **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.

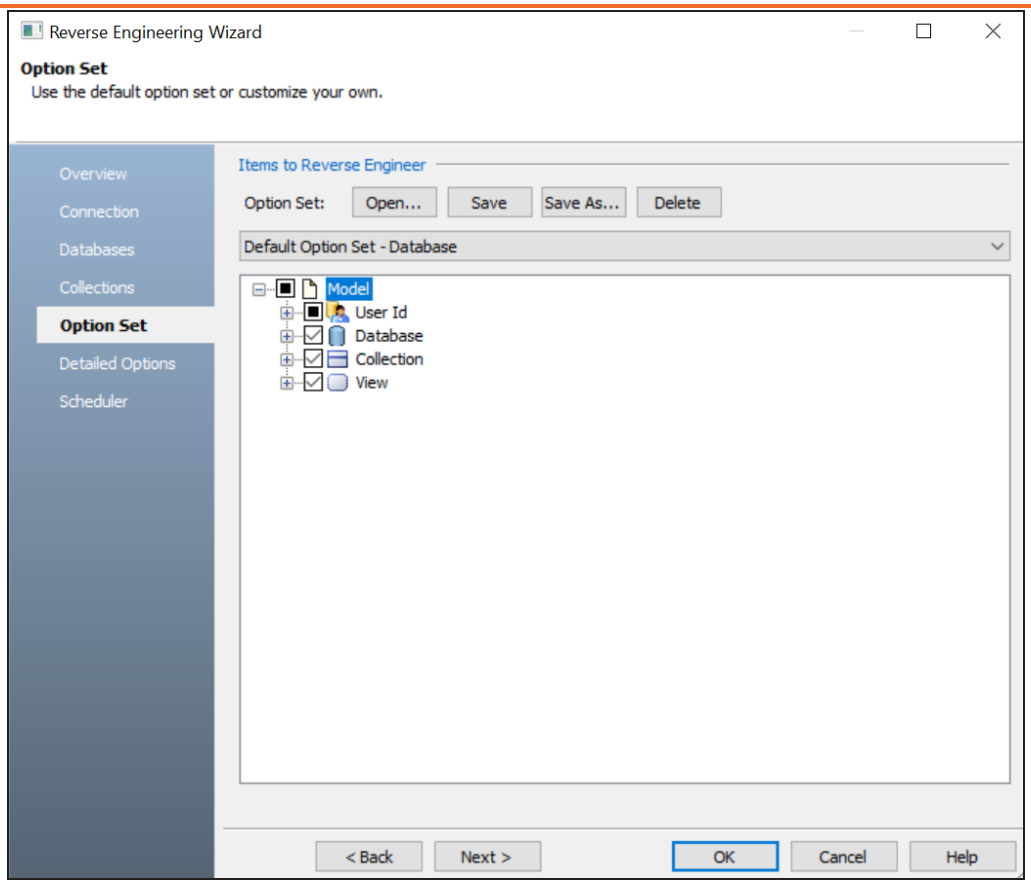
8. Under **Available Collections**, select the collections that you want to reverse engineer. Then, click  .



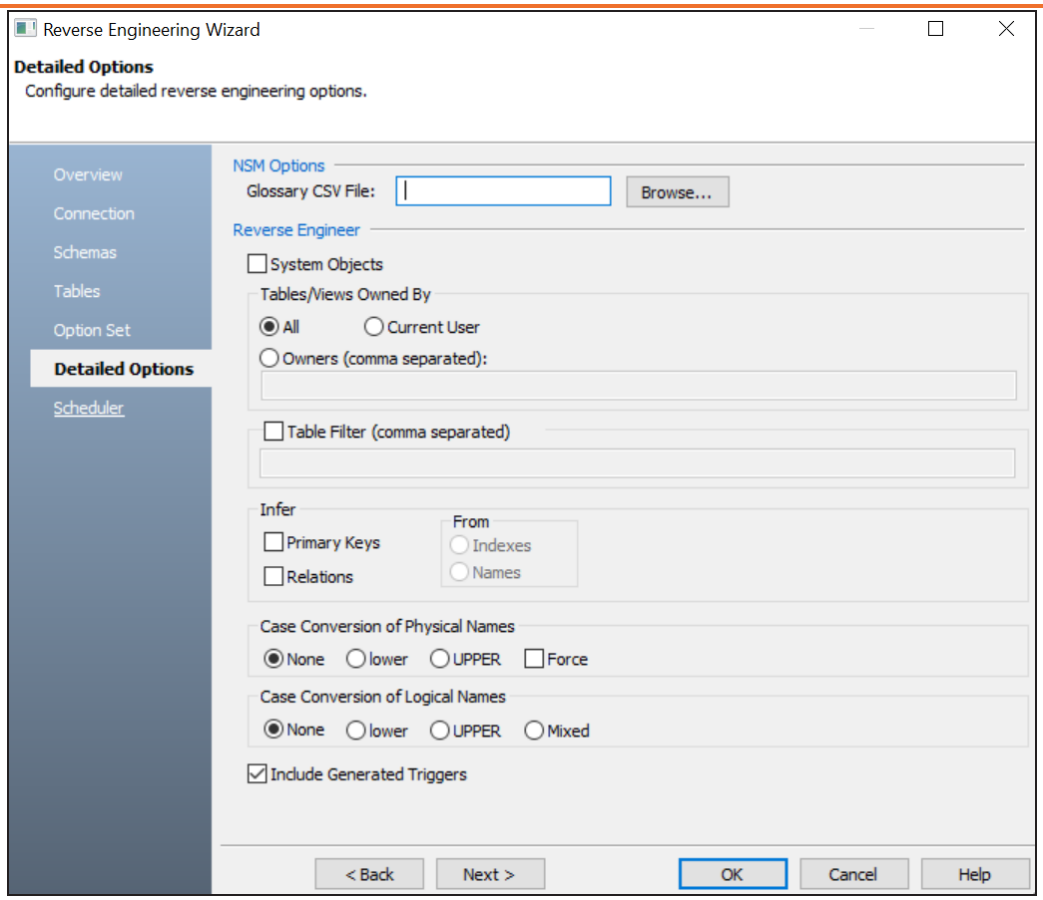
This moves the selected collections under Selected Collections.



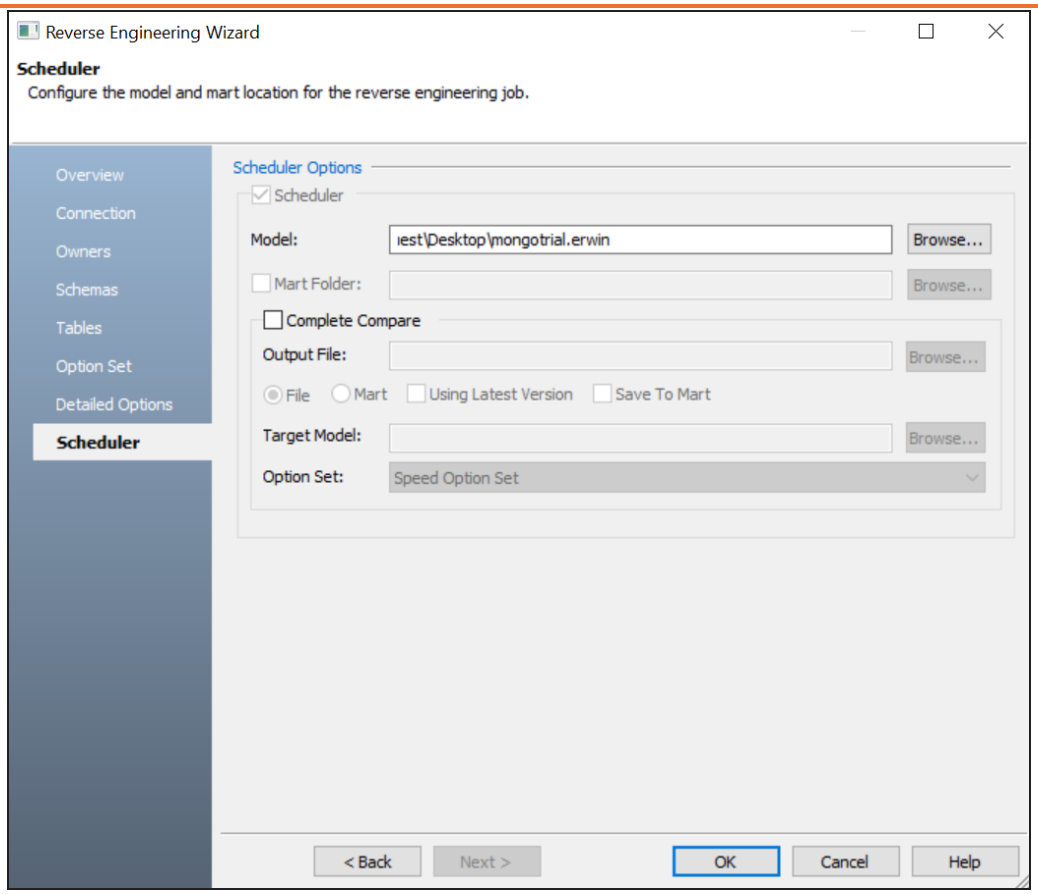
9. Click **Next**.
   The Option Set section appears. It displays the default option set. You can either use the default or a custom option set.



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



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



12. On the Scheduler section, configure the scheduler options. For more information, refer the following table:

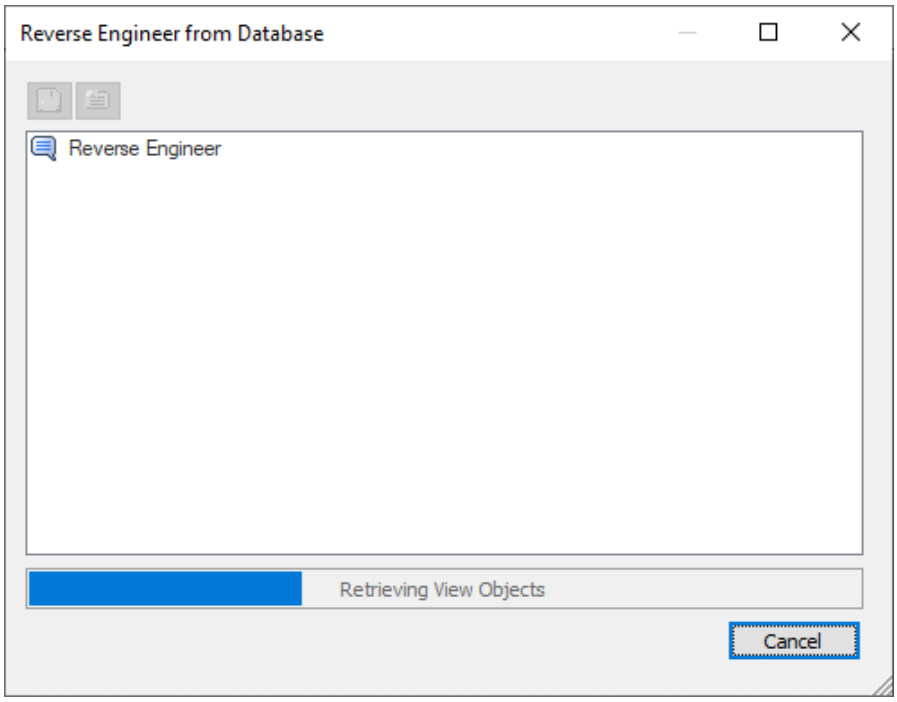
Parameter	Description	Additional Information
Model	Specifies the location where the reverse engineered model should be saved and its name	When you schedule a job on a remote server, ensure the model path is same for remote and local server. For example: C:\Scheduler\<Model Name>.erwin
Mart Folder	Specifies the location/library in your mart where the reverse engineered model should be	To use this option, ensure that you are connected to a mart. For more information, refer to the Connecting to Mart topic.

	saved.	
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 after the reverse engineering process	
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	
Option Set	Specifies the option set that must be 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.

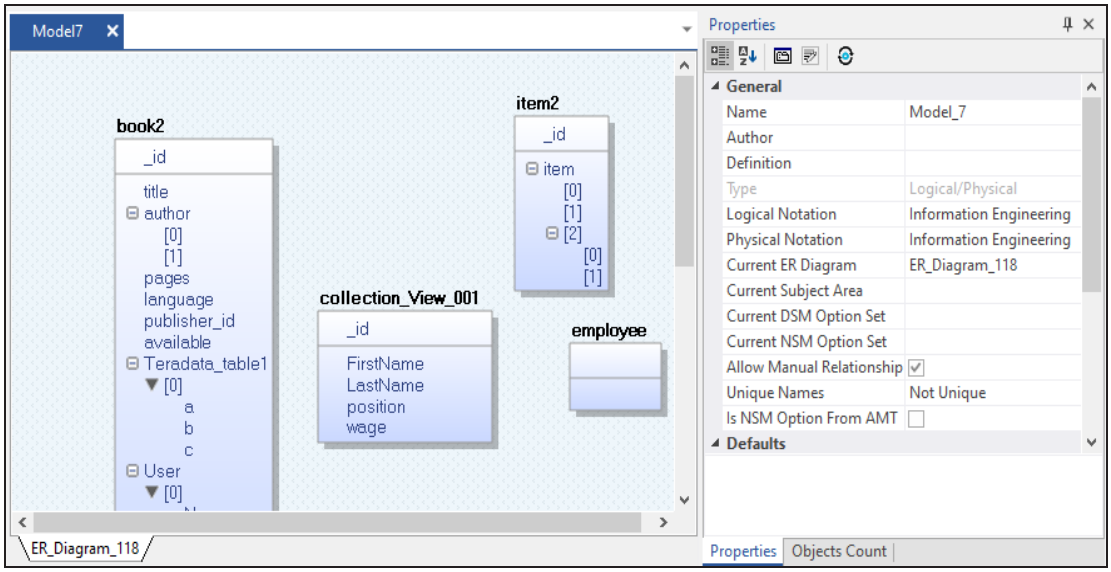
13. Click **OK**.

    The reverse engineering process starts.



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

model is created.

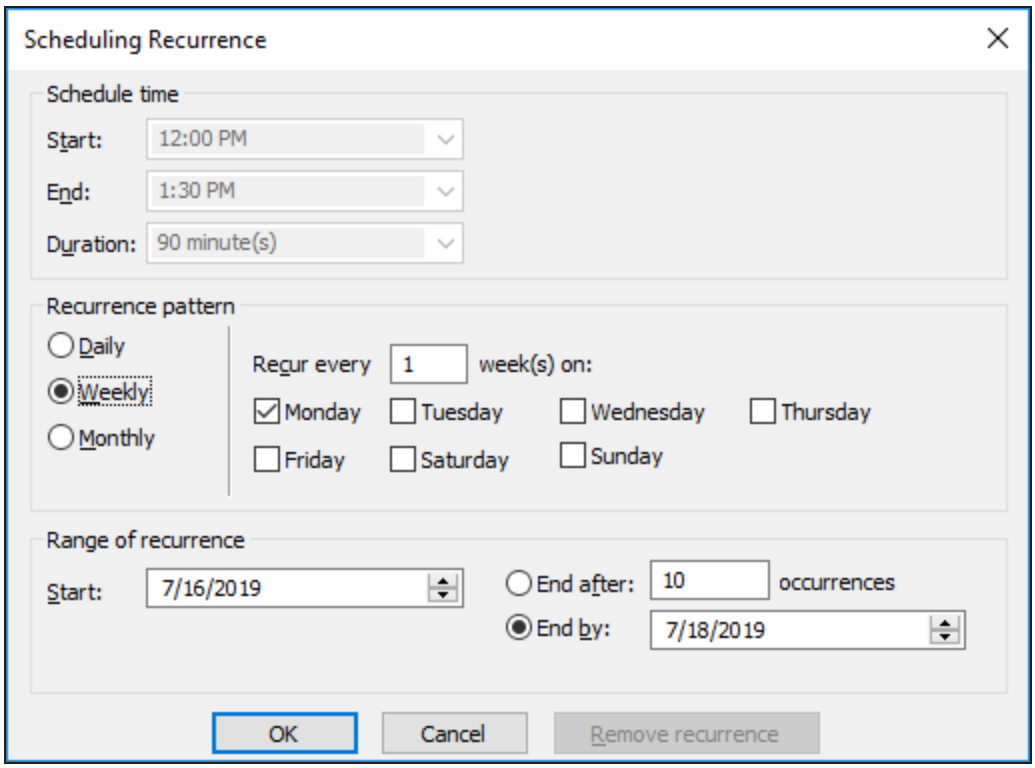


Setting Recurrence

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

To set recurrence while scheduling a new RE job, do the following:

1. On the erwin DM Scheduler Event Details dialog box, 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 at 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 work day. For example:
  - Run the job every 2 days.
  - Run the job every work day (Monday-Friday).

For the Daily-WorkDays combination to work, ensure that you have strictly set the work days 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, do the following:

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, do the following:

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. For more information, refer to the Setting Reverse Engineering Options topic. However, to save a model to a mart, you need to be connected to it.


Ensure that you have configured and initialized erwin Mart Server.

To connect to a mart, follow these steps:

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

   The Connect to Mart dialog opens.

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 IIS

   Specifies that you want to use the IIS web server to connect to Mart. This check box is enabled only if you have configured IIS. For more information about configuring IIS, see the Implementation Guide (Workgroup Edition).

   
   If you use IIS, open server.xml file available at C:\Program Files\erwin\Mart Server r9\Tomcat64\conf and un-comment <Connector port="8009" protocol="AJP/1.3" allowedRequestAttributesPattern=".*" redirectPort="8443" secretRequired="false"/>.

   IIS Port

Specify the IIS port number that you want to use. This field is enabled only if you select the Use IIS check box. The default is 80.

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).

If you use IIS with SSL, open server_ssl.xml file, which is available at C:\Program Files\erwin\Mart Server r9\Tomcat64\conf and uncomment Connector port="8009" protocol="AJP/1.3" allowedRequestAttributesPattern=".*" redirectPort="8443" secretRequired="false"/>.

Application Name

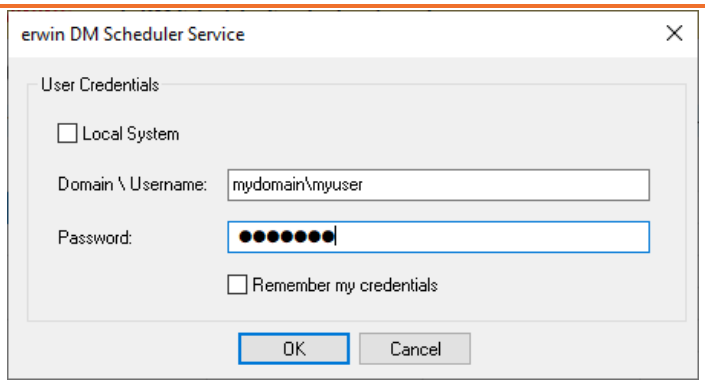
Defines the application name of the Mart that you want to connect to.

Default: MartServer

Authentication

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

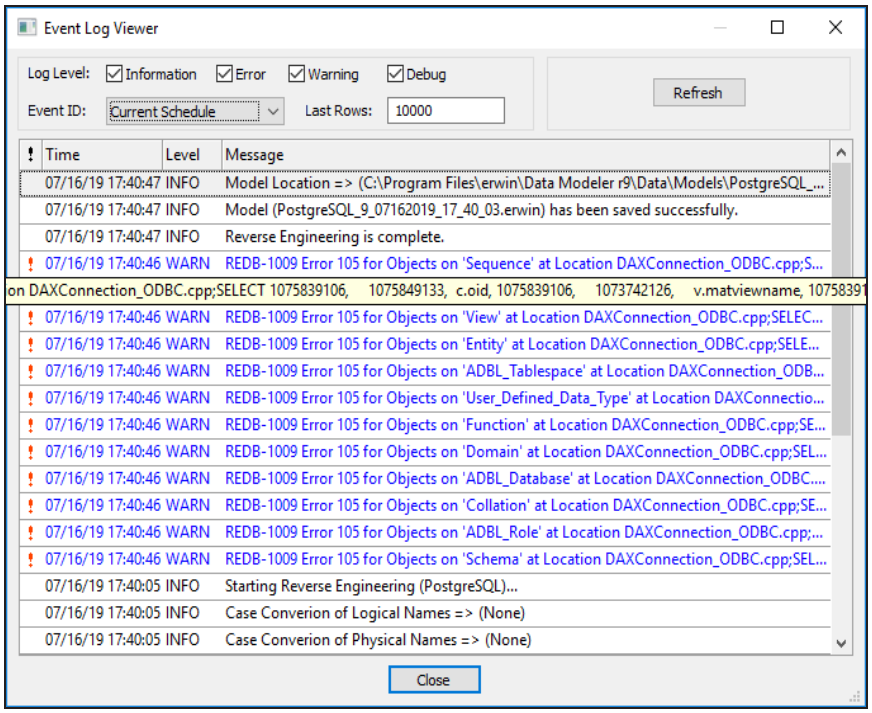
- When the job is running, its progress is indicated as approximate percentage of completion on the job event tile.
- Job schedule is indicated on on the job event tile and on job event tooltips.
- Job status is indicated on job event tile and job event tooltips, and by a color code as follows:

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, do the following:

1. In the Calendar View, right-click a job event tile.
2. Click **Event log**.
   The Event Log Viewer dialog box is displayed.



   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**: Choose 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:

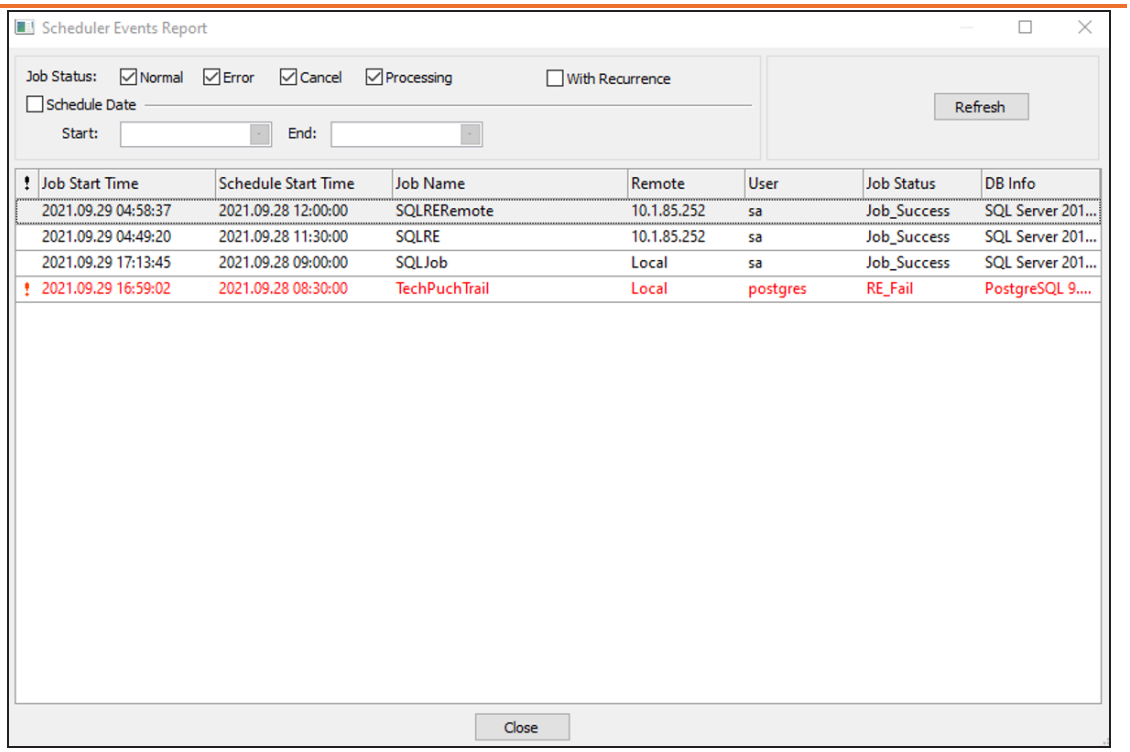
- **Rerun Event**: Runs the job event again.
- **Copy Event**: Copies the job and its settings. You can then paste the copied job on the date and time of your choice.

  
  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
- **Properties**: Opens the erwin DM Scheduler Event Details dialog box. 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, do the following:

1. On the ribbon, click **Scheduler Events Report**.
   The Scheduler Events Report appear. This displays the list of jobs and their status.



On the Scheduler Events Report, use the following filter options to view the event log.

- **Job Status**: Select one or more options to filter events log. You can filter event logs based on successful or failed jobs, canceled or jobs in progress or recurring jobs based on the requirement.
- **Scheduled Date**: Choose a date range here to view event logs for selected date.

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:

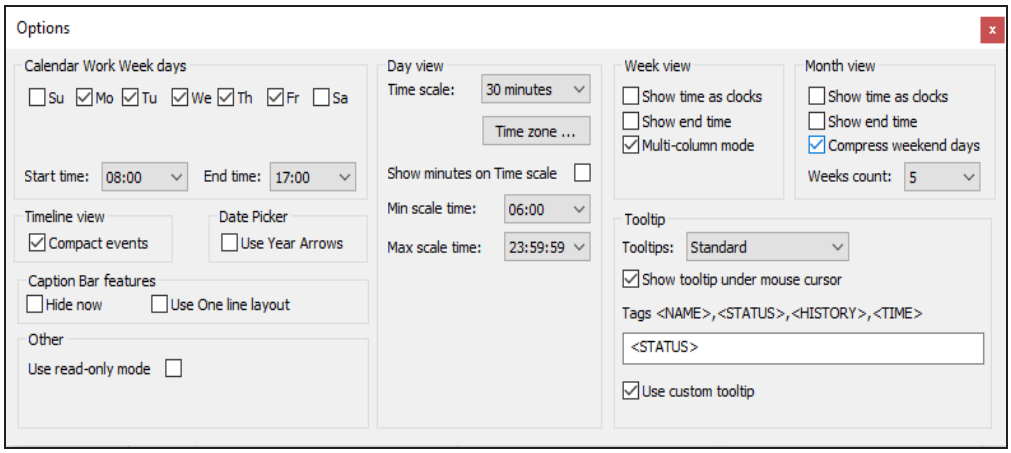
- On the ribbon, in the Arrange group, click one of the options given in the following table:

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.
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.

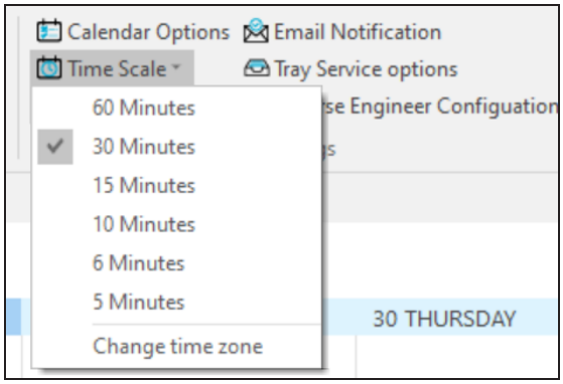
Section	Option	Description
Day view		Set the appearance of the Day view of the calendar.
	Time scale	Set calendar view's time interval.
	Time zone	Set default time zone to be used. Also, you can set an additional time zone.
	Show minutes on Time scale	Specify whether the time scale displays minutes on 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.
	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.

Section	Option	Description
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.
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 tooltip 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.

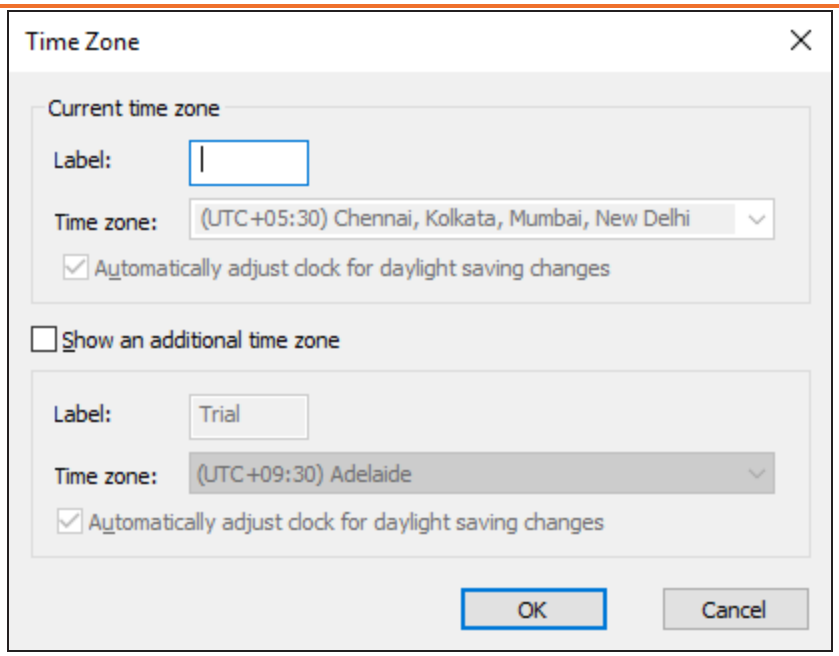


- **Using Calendar Options**:
  - On the ribbon, in the Settings group, click **Calendar Options**. The Options dialog box opens.
  - Under Day view, select the time interval. For more information, refer to the Setting Calendar Options topic.

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



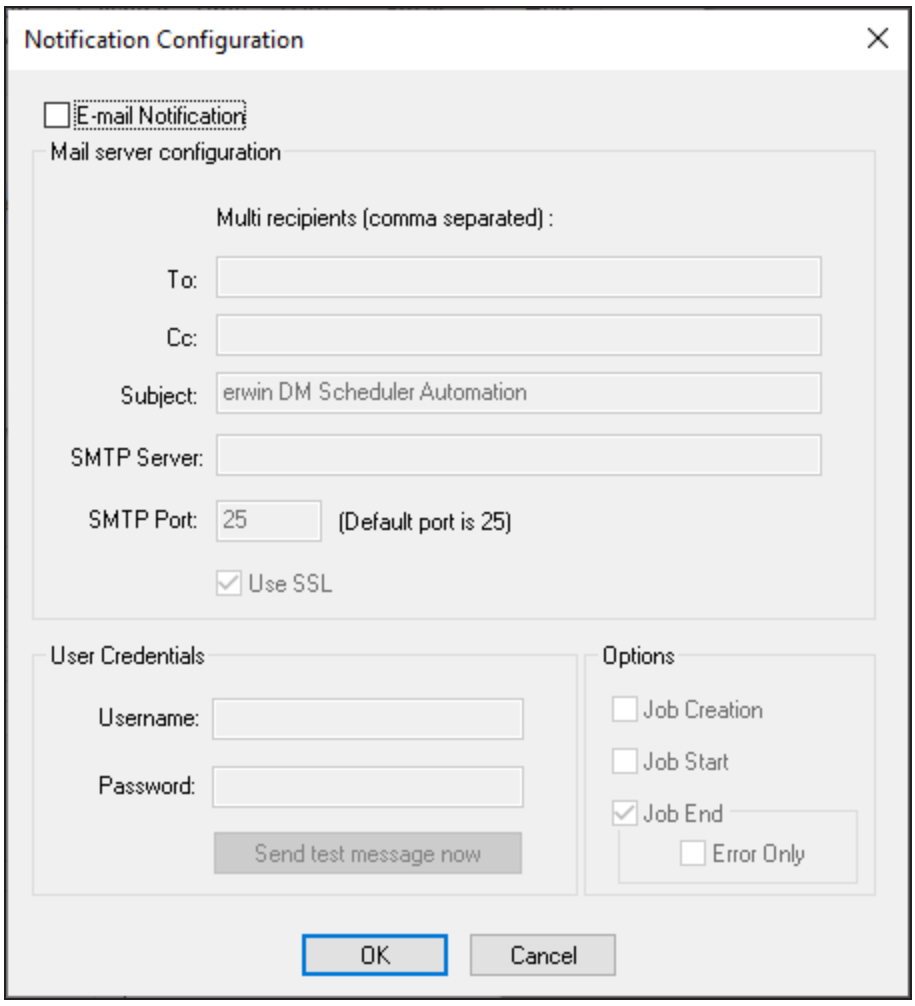
2. Select **Show an additional time zone**.
3. Set a label to the additional time zone.
4. From the **Time zone** drop-down list, select a time zone.
5. Click **OK**.

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\.

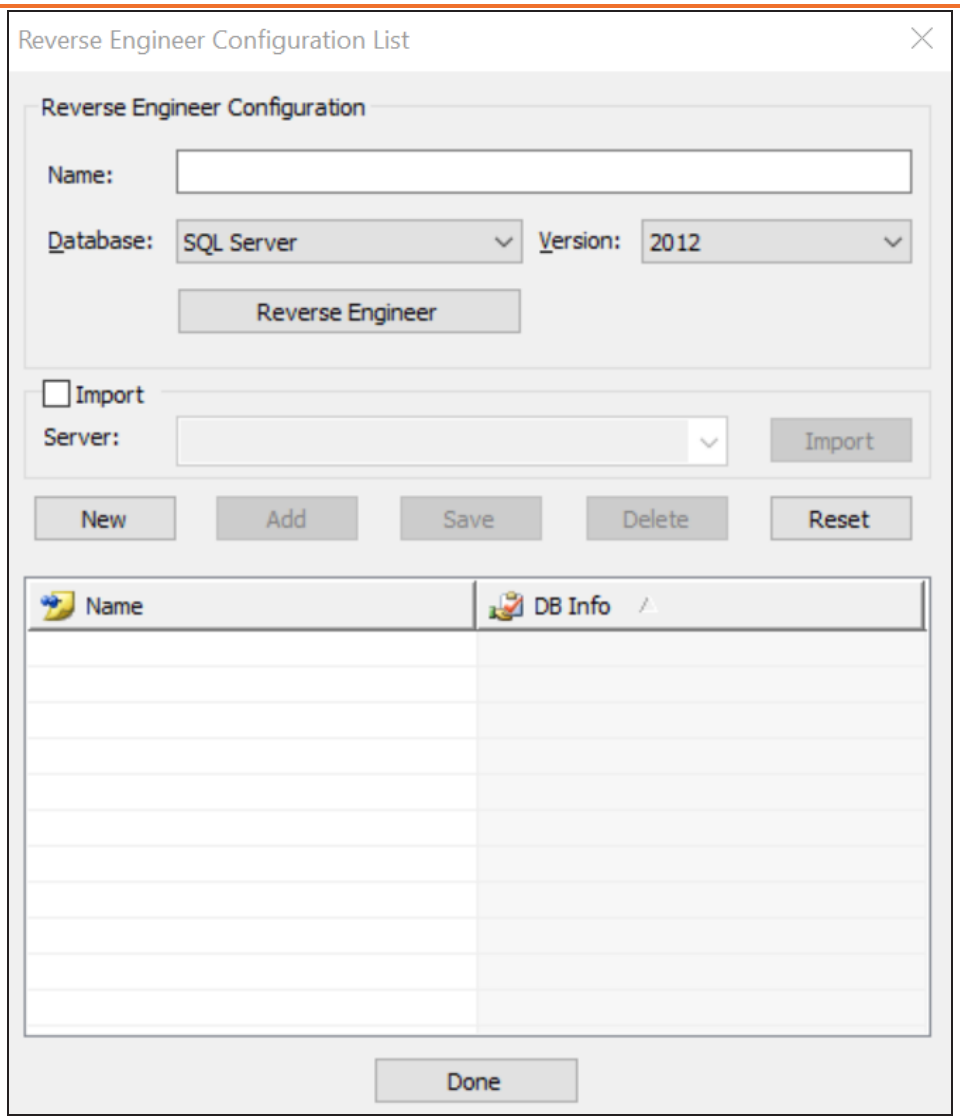
3. In the Mail Server Configuration section, work on the following:
   - **To and CC**: Add an email address or a list of comma-separated email addresses.
   - **Subject**: Enter a notification subject. By default, it is set to erwin DM Scheduler Automation.
   - **SMTP Server**: Enter your SMTP server 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 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, and job end due to an error.
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, in the Settings group, click **Reverse Engineer Configuration**.
   The Reverse Engineer Configuration List appears.



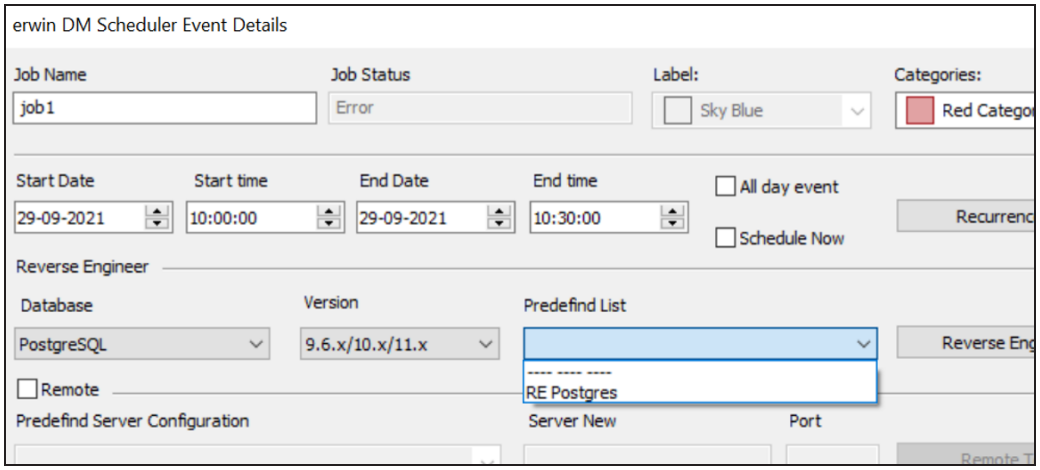
2. On the Reverse Engineer Configuration List, use the following options in the below table to create or import configurations.

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

Option	Description
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 on a remote server.
Server	Select a server on the drop-down, then click **Import**. 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.
   - **Add**: Use this option to add the new configuration. The added configurations are displayed in the configurations list.
   - **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.
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.

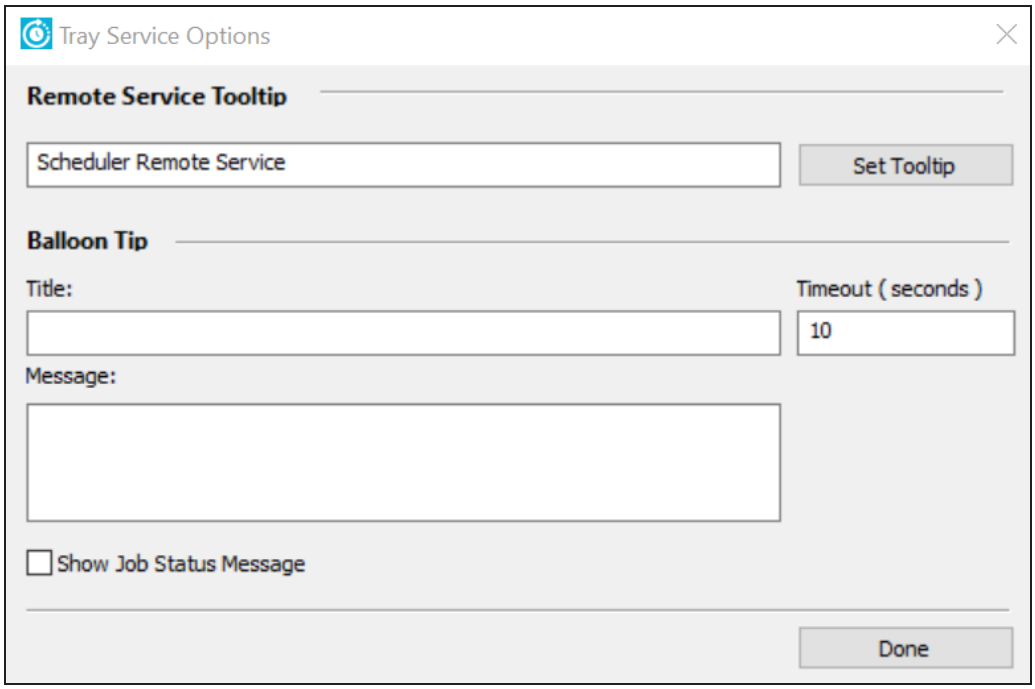


Setting Tray Service Options

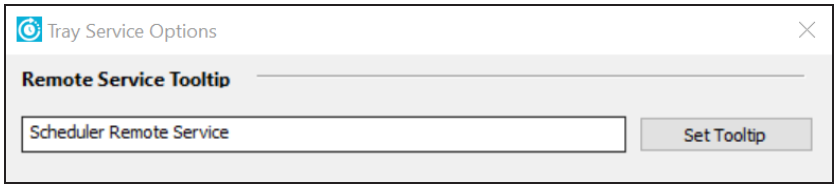
You can set up custom tooltip name, notification balloon title, and message for your machine using the Tray Service Options pane. The tray service options are applicable for reverse engineering from remote sever connection. Also, ensure the remote service is started to receive system notifications.

To set up tray service options, follow these steps:

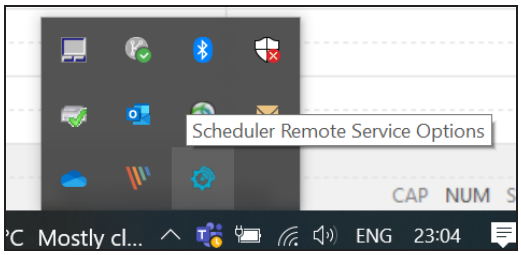
1. On the ribbon, in the Settings group, click **Tray Service Options**.
   The Tray Service Options pane appears.



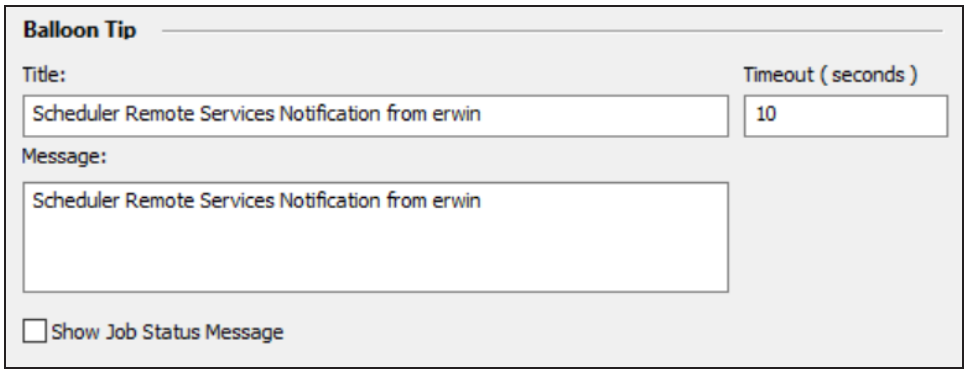
2. Under the Remote Service Tooltip section, enter a tooltip name for the remote service icon.



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. On the Balloon Tip section, you can add a custom title, message, and set timeout for the windows notification messages.

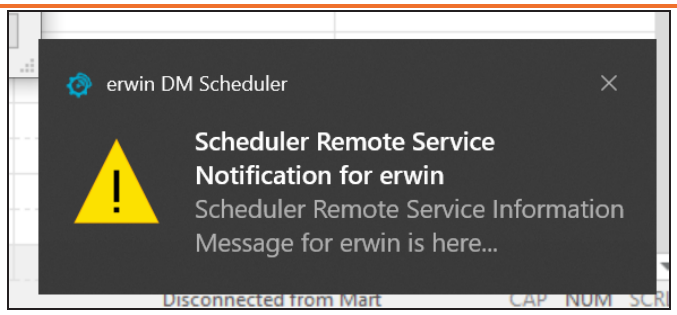


5. Select **Show Job Status Message** option to display the message content in the windows notification.

6. 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.


erwin DM Scheduler
Scheduler Remote Service
Notification for erwin
Scheduler Remote Service Information
Message for erwin is here...
Disconnected from Mart
CAP
NUM