Common Mode Elements

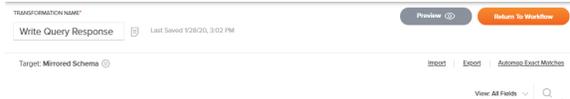## Introduction

Some elements of the user interface are shared by the display modes for accessing a transformation: mapping mode, script mode, and preview mode. This page covers elements that are shared by the header of the transformation screen:

- **Mapping Mode**

- **Script Mode**

- **Preview Mode**

Renaming a Transformation

By default, a new transformation is named "New Transformation," with a number appended if there are additional transformations with the same name. The transformation name must be unique within the project.

To rename a transformation from the design canvas, click the name below the transformation block to bring the name into edit mode, then enter a name:
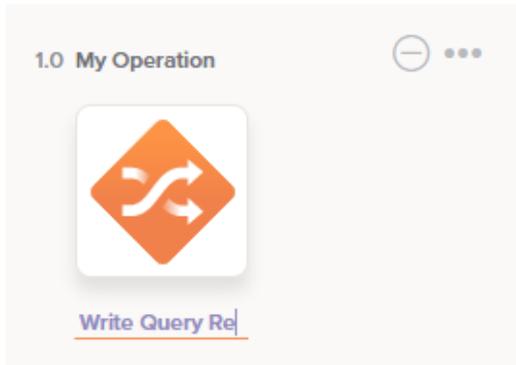
To rename a transformation from within the transformation configuration screen, click into the **Transformation Name** box along the top left and enter a name:
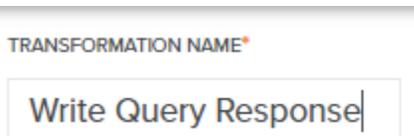
Adding Notes

You can add custom notes to a transformation that serve as documentation or reminders for yourself or project collaborators. To add a note, click the note icon next to the transformation name:

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An editable area will open where you can enter the text of your note. Then click **Post** to add the note on the transformation:
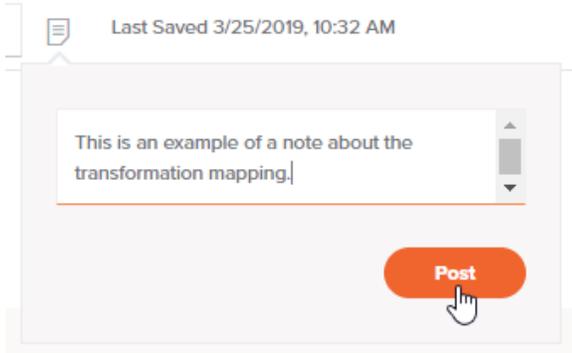
Your posted note will be displayed, along with your name and a timestamp. Anyone with edit access to the transformation can remove notes by clicking the remove icon ✕ . To close the note, simply click on another part of the interface.
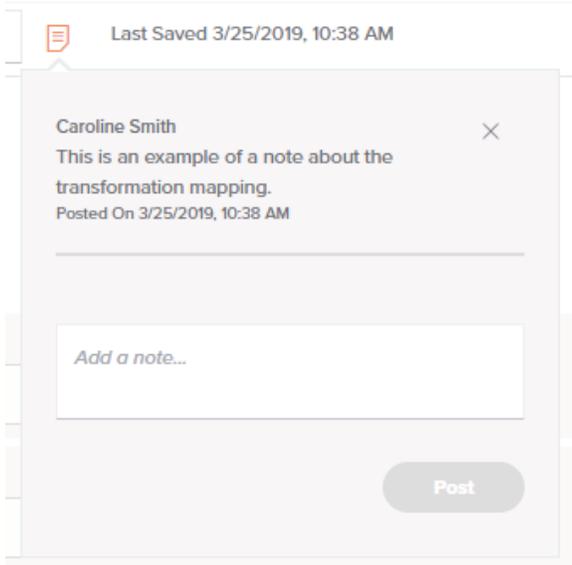
When one or more notes are present, the note icon color is displayed in orange:

Additional notes can be added using the same method described above.

Viewing Save Status

Upon making changes to a mapping, the transformation configuration saves automatically. The save status is displayed along the top of the screen next to the transformation name and note icon:

The presence of a red asterisk following the time indicates that the transformation has unsaved changes:

To manually save the transformation, use `Control+S` (or `Command+S` on Mac).
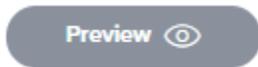
To learn more about auto-save, see Project Permissions, Collaboration, and Saving.

Previewing a Transformation

After you have configured a transformation mapping, you can use sample data to test the transformation.

Mapping and script modes provide a **Preview** button to enter preview mode:

In preview mode, this button expands to interact with the data being previewed:

Returning to the Workflow

To return to the design canvas, click **Return To Workflow** in the top right:

The workflow that contains the open transformation will be displayed.

Viewing or Editing the File Schema

After defining a schema within a transformation, menu actions for that schema are available along the top of the transformation configuration screen. Along the top of either the source or target side, click the gear icon to open the actions menu:

- **Edit Activity:** Available only when the transformation has an adjacent activity with a schema, this opens the activity configuration for you to make changes as necessary (see Schemas Defined in an Activity). For file-based activities, you can edit the configuration to clear or swap out the file you selected to use for the file schema. For other activities, you can edit the query, change the object selection, or other such configuration.

  > ✓ **TIP:** If you see another schema besides the schema provided by the activity in the transformation, you may have another schema defined in the transformation that is overriding the activity schema. After clearing the schema being used in the transformation (with the **Clear Schema** option), the schema provided by the activity will be inherited by the transformation.

- **Edit Schema:** Available only for schemas that are editable, this opens the schema editor for you to edit the schema (see Schemas Defined in a Transformation). When you edit a schema that was created from a sample file in a transformation, the configuration screen opens for a custom flat schema or custom hierarchical schema opens for you to add or edit fields and/or nodes as required.

  > ⚠ **CAUTION:** Schemas provided by an adjacent activity are not editable.

- **Clear Schema:** Available only for schemas defined within a transformation, this clears the current schema from the transformation. When removing a schema, a message will ask you to confirm removal of the schema, with these results:
    - **Source Schema:** Removal of a source schema may result in invalid mappings. For more information, see Transformation Mapping Validity.
   - **Target Schema:** Removal of a target schema will remove all mappings.

> ⓘ **NOTE:** After clearing the schema, if an adjacent activity is providing a schema, it will automatically be inherited by the transformation.

Filtering or Searching

Using filter or search can help you locate a specific field within the source or target structures. You can also use search on the source structure to locate a specific variable to use in the target structure, or you can use search on the target structure to search within transformation mapping scripts themselves.

Filter

In mapping and preview modes, the **View** dropdown is located at the top of both the **Source** and **Target** structures. In script mode, the **View** dropdown is present at the top of the **Target** structure. This dropdown allows you to filter by these selections:
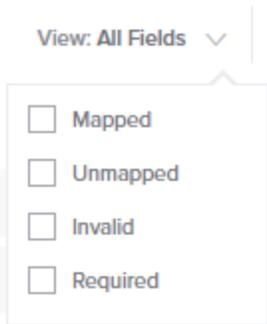
- **All Fields:** All fields are displayed.
- **Mapped:** Only fields that have been mapped are displayed. In mapping and preview modes, within the **Source** structure, mapped objects are limited to those that have been mapped to a target field. In all modes, for the **Target** structure, mapped fields are those that have been defined in some way (with a source object, a variable, a custom value, or any other script logic).

   Mapped fields show a script icon in the upper right of the target field.
- **Unmapped:** Only fields that have *not* been mapped are displayed.
- **Invalid:** This option is available only on the **Target** structure. Only fields that have been mapped where the mapping is not valid are displayed. Mapping validity is detailed under Transformation Mapping Validity.
- **Required:** This option is available only on the **Target** structure. Only fields that have a cardinality key of `[1]` or `[1+]` are displayed. For more information, see Cardinality Key under Nodes and Fields.

In mapping and preview modes, when viewing mapped objects within the **Source** or **Variables** tabs, a number in parentheses and the color orange indicates the number of times that each object is referenced on the target side of the transformation.

In addition, upon hovering over a source object, line(s) will appear connecting the source field to any target fields it is mapped to or nodes it is referenced within. Click directly on the number to display the referenced target field(s) or node(s) and click to automatically scroll to the object or node in the target structure.


When viewing mapped objects within the **Target** structure, upon hovering over the field a line will appear connecting the mapped target field to its origins in the **Source** or **Variables** tabs, if applicable. Click the mapped source object to automatically go to the object in the tab.
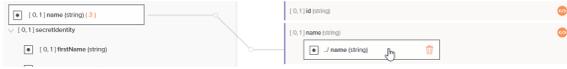
Clicking on the name of a mapped target object will collapse it so that its mapped objects are not visible.

If a collapsed node contains target field mappings, that node is shown in bold to indicate it contains mappings:
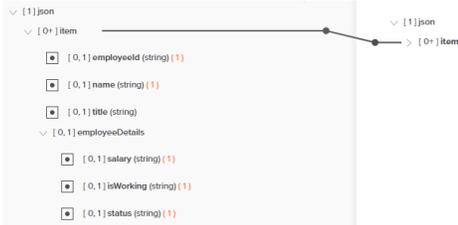
Search

You can also search for specific fields in all modes. A search icon ⌕ is located at the top of the **Source** and **Variables** tabs in mapping and preview modes, and the **Target** structure for all modes. Click this icon to open a search box where you can enter a keyword or multiple keywords separated by commas.

When searching on the source structure, fields or variables that have any of part of any of the keywords in their name will be returned.

When searching on the target structure, fields that have any part of any of the keywords in the field name or within a field's transformation mapping script will be returned.

> ⓘ **NOTE:** Within the **Source** tab and the **Target** structure, the search is limited to the selected filter. To search both mapped and unmapped fields, make sure to select **All Fields** in the filter dropdown.