

# DataFlux Data Management Server



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# DataFlux Data Management Server User's Guide

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# Introduction

This section provides basic information about the DataFlux® Data Management Server (Data Management Server) product and documentation. Data Management Server supports all features available in the corresponding Data Management Studio release.

- [Conventions Used in This Book](#)
- [DataFlux Reference Documentation](#)

## Conventions Used In This Document

This document uses several conventions for special terms and actions.

### Typographical Conventions

The following typographical conventions are used in this document:

Typeface	Description
<b>Bold</b>	Signifies a button or action.
<i>Italic</i>	Identifies arguments or values that you supply, such as version numbers.
Monospace	Indicates filenames, directory paths, and examples of code.

### Syntax Conventions

The following syntax conventions are used in this document:

Syntax	Description
#	The pound # sign at the beginning of example code indicates a comment that is not part of the code
>	The greater than symbol is used to show a browse path, for example <b>Start &gt; Programs &gt; DataFlux Data Management Server &gt; User's Guide</b>

# DataFlux Reference Documentation

This document may reference other DataFlux documentation, including:

*DataFlux Authentication Server Administrator's Guide*

*DataFlux Authentication Server User's Guide*

*DataFlux Federation Server Administrator's Guide*

*DataFlux Federation Server User's Guide*

*DataFlux Data Management Server Administrator's Guide*

*DataFlux Data Management Studio Installation and Configuration Guide*

*DataFlux Data Management Studio Online Help*

*DataFlux Expression Language Reference Guide*

*DataFlux Quality Knowledge Base Online Help*

# Overview

DataFlux® Data Management Server (Data Management Server) addresses the challenges of storing consistent, accurate, and reliable data across a network by integrating data quality and data integration business rules throughout your IT environment. Using Data Management Server, you can replicate your business rules for acceptable data across applications and systems, enabling you to build a single, unified view of the enterprise.

The Data Management Server Manager is a Microsoft® Windows® client application that allows administrators to manage real-time data and process services, profile jobs, and batch jobs on a server from a remote client. The Data Management Server Manager allows you to perform several tasks, including managing server definitions, importing and exporting repository items, running jobs, testing services, and managing data connections.

# Data Management Server Manager User Interface

The DataFlux® Data Management Server Manager (Data Management Server Manager) can manage several server connections. It can be used to manage jobs that run on the server by supporting several tasks, including run actions, deletes, and connection management. For a complete description of the functionality of the Data Management Server Manager, see [Overview](#).





## Toolbars

The Data Management Server Manager has two toolbars - one is displayed in the navigation pane and the other is displayed in the information pane.

### Navigation Pane Toolbar

The Data Management Server Manager navigation pane toolbar provides the following buttons to quickly perform several common actions:

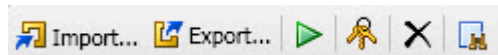








Button	Name	Description
	<b>New</b>	Allows you to create a new Data Management Server.
	<b>Import</b>	Allows you to import items from a repository.
	<b>Export</b>	Allows you to export the selected object to a repository.
	<b>Edit</b>	Allows you to edit the selected object. If this option is not available, you cannot edit the object.



## Information Pane Toolbar

The Data Management Server Manager information pane toolbar provides the following buttons:



Button	Name	Description
 Import...	<b>Import</b>	Allows you to import items from the repository.
 Export...	<b>Export</b>	Allows you to export the selected object to a repository.
	<b>Run</b>	Allows you to run the selected job.
	<b>Permissions</b>	Allows you to set access control on objects.
	<b>Delete</b>	Allows you to delete one or more selected objects.
	<b>Find</b>	Allows you to locate the selected item in the tree and displays it.

# Using Data Management Server

You can use the DataFlux® Data Management Server Manager (Data Management Server Manager) to create and test connections to one or more Data Management Servers. You can also set permissions on objects. The Data Management Server Manager comes installed in both the DataFlux Data Management Studio and the Data Management Server file groups on Microsoft® Windows® machines. The following topics provide information on tasks you can perform using the Data Management Server Manager:

- [Managing Server Definitions](#)
- [Importing and Exporting Repository Items](#)
- [Running Batch and Profile Jobs](#)
- [Testing Real-Time Services](#)
- [Deleting Jobs and Services](#)
- [Managing Data Connections](#)


## Managing Server Definitions

You can use the Data Management Server Manager to manage server definitions. This includes creating, editing, and deleting server definitions.

From the Data Management Studio user interface, click the **Data Management Servers** riser to access the Data Management Server Manager.


## Creating Server Definitions

To create a server definition:

1. Click **New Data Management Server** . The **Management Server** dialog opens.
2. In the **Management Server** dialog, specify a name for the server in the **Name** field, an optional description, the fully qualified server name in the **Server** field, and a port number in the **Port** field. Optionally, you can specify the domain on the DataFlux Authentication Server where your credentials exist.
3. Click **Test Connection** to verify that you can connect to the server.
4. Click **OK**.


## Editing Server Definitions

To edit a server definition:

1. Click **Data Management Servers**. In the Information pane, click the name of the server you want to edit.
2. Click **Edit** .
3. In the **Edit Management Server** dialog, make the desired changes. To test the connection to the server, click **Test Connection**. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
4. Click **OK**.

## Deleting Server Definitions

To delete one or more server definitions:

1. Click **Data Management Servers**. In the Information pane, click the name of one or more servers you want to delete.
2. Click **Delete** .
3. Confirm that you want to delete the servers by clicking **Yes**.



**Note:** Deleting a server definition does not delete the actual Data Management Server.


## Importing and Exporting Repository Items

You can import repository items into and export repository items out of your Data Management Server.

From the Data Management Studio user interface, click the **Data Management Servers** riser to access the Data Management Server Manager.

### Importing Repository Items


To import one or more repository items, complete the following steps:

1. Click **Data Management Servers** and click the name of the server you want to import items into. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
2. Click the job or service category into which you want to import items. In the Information pane, click **Import**  **Import...**. The **Import From Repository** wizard opens.
3. In the **Import Items** dialog, navigate through the tree and select one or more repository items. Then, click **Next**.

4. In the **Import Location** dialog, select a Data Management Server and select a location. Click **New Folder** to create a new folder. Then, click **Import**.
5. In the **Import Status** dialog, once the import completes, click **Close**.

## Exporting Repository Items

To export one or more repository items, complete the following steps:

1. Expand **Data Management Servers** and click the name of the server you want to export items from. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
2. Click the job or service folder from which you want to export items. In the Information pane, click **Export**  **Export...**. The **Export To Folder** dialog opens.
3. Type a name in the **Name** field and specify the repository or folder where the content will be exported. Then, click **Open**.

If an item already exists with the same name, you will be asked whether you want to overwrite the existing item, rename the new item, or skip the item.



## Running Batch and Profile Jobs

You can run batch and profile jobs, using the Data Management Server Manager.

From the Data Management Studio user interface, click the **Data Management Servers** riser to access the Data Management Server Manager.

### Running Batch Jobs



To run a batch job, complete the following steps:

1. Click the name of the server for which you want to run batch jobs. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
2. Expand the **Batch Jobs** folder and click the folder containing the jobs you want to run.
3. In the Information pane, on the **Batch Jobs** tab, select the job name, and then click **Run** .
4. In the **Run Job** dialog, click **New Variable**  **New Variable...** to provide one or more variables. Setting input variables is an optional step and variables must be declared on the job.
5. Click **Run**. Check the **Run History** tab for the job status.

## Running Profile Jobs

You can run profile jobs, using the Data Management Server Manager.

To run a profile job, complete the following steps:

1. Click the name of the server for which you want to run profile jobs. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
2. Expand the **Profile Jobs** folder and click the folder containing the jobs you want to run.
3. In the Information pane, on the **Profile Jobs** tab, select the job name, and then click **Run** .
4. In the **Run Process** dialog, you can specify an optional description. To replace an existing reports, unselect the **Append to existing report** option.
5. Click **Macro Variables** to provide one or more variables. In the **Profile Macro Variables** dialog, click **New Macro Variable**  and specify a value for the variable. Click **OK**. Setting input variables is an optional step and variables must be declared on the job.
6. In the **Run Process** dialog, click **OK**. Check the **Run History** tab for the job status.


## Testing Real-Time Services

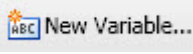
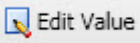

You can test real-time data and process services, by running the services. This task can be performed using the Data Management Server Manager.

From the Data Management Studio user interface, click the **Data Management Servers** riser to access the Data Management Server Manager.

## Testing Real-Time Data Services


To test a real-time data service, complete the following steps:

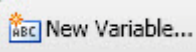
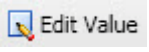

1. Click the name of the server for which you want to test real-time data services. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
2. Expand the **Real-Time Data Services** folder and click the folder containing the jobs you want to run.
3. In the Information pane, on the **Real-Time Data Services** tab, select the data service name, and then click **Test** .

4. In the **Test Real-Time Data Service** dialog:
  - In the **Data Inputs and Outputs** tab, the **Data inputs** section is populated with information from the external data provider node. Additionally, you can perform the following tasks:
    - Click **New Row** to add new rows. Specify the appropriate input fields, depending on the service you are testing.
    - Select a cell in a row you want to remove and click **Delete Row**.
    - Click **Delete All** to delete all rows.
    - Click **Import From File** to navigate to a file which has values you want to import.
  - In the **Variable Inputs and Outputs** tab, in the **Variable inputs** section:
    - Click **New Variable**  to specify a new variable name, and click **OK**.
    - Select a variable name and click **Edit Value**  to specify or change the value for a variable.
    - Select one or more variable names and click **Delete**  to remove the variables.
5. Click **Test**. If the test was successful, output data and variables fields will be populated. If the server is not able to test the job, an error will be displayed.
6. Click **Close**.

## Testing Real-Time Process Services

To test a real-time process service, complete the following steps:


1. Click the name of the server for which you want to test real-time process services. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
2. Expand the **Real-Time Process Services** folder and click the folder containing the jobs you want to run.
3. In the Information pane, on the **Real-Time Process Services** tab, select the process service name, and then click **Test** .


4. In the **Test Real-Time Process Service** dialog, in the **Variable inputs** section:
  - Click **New Variable**  to specify a new variable name, and click **OK**. Setting input variables is an optional step and variables must be declared on the process service job.
  - Select a variable name and click **Edit Value**  to specify or change the value for a variable.
  - Select one or more variable names and click **Delete**  to remove the variables.
5. Click **Test**. If the test was successful, output data and variables fields will be populated. If the server is not able to test the job, an error will be displayed.
6. Click **Close**.

## Deleting Jobs and Services

You can delete jobs and services, using the Data Management Server Manager.

To delete a job or services, complete the following steps:

1. From the Data Management Studio user interface, click the **Data Management Servers** riser to access the Data Management Server Manager.
2. Click the name of the server for which you want to delete a job or service. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
3. Expand the jobs or services folder, and then click the folder containing the job or service you want to delete.
4. In the Information pane, on the jobs or services tab, select the object name, and then click **Delete** . The delete operation is final and cannot be cancelled.

 **Note:** Deleting a job does not delete the run history. You have to separately delete the run history if you want to clean-up old runs of jobs.

## Managing Data Connections

Data Management Studio (Studio) allows you to create and maintain data source name (DSN) connections, which are also referred to as data connections. Data connections can be used to access ODBC, localized DSN, SAS data sets, and custom non-ODBC connections. For data connections that require credentials, you can save your credentials. This allows you to make connections to that data source without being prompted for login credentials. When a job is run, the saved user credentials are retrieved and used. This allows the job to bypass saving credentials within the job and only references the data connection via the DSN name at runtime. Since Studio jobs can be deployed from the client to the Data Management Server, data connections for the job need to be on the server.

When running a deployed job, the Data Management Server may use the named connection and corresponding saved user credentials. The connections need to be created on the Data Management Server with the same names that are used on the client. Another way to look-up user credentials is to associate a connection with a domain. The domain feature can be used when an DataFlux Authentication Server has been configured and the user logs into the DataFlux Authentication Server. At this point, when accessing a data connection that has an associated domain, the login credentials are looked up via the DataFlux Authentication Server and those credentials are used when the job is run.

You can use the Data Management Server Manager to create new data connections, edit connections, manage ODBC credentials, and delete connections. You can manage connections on the server, for any type of server, including servers on different operating systems. The following topics provide information on tasks you can perform using the Data Management Server Manager:

- [Creating Data Connections](#)
- [Editing Data Connections](#)
- [Managing ODBC Credentials](#)
- [Deleting Data Connections](#)

## Creating Data Connections

You can create the following types of data connections:

- Localized DSN Connections
- Custom Connections
- SAS Data Set Connections

For information on creating each of these connections, see the *DataFlux Data Management Studio Online Help*.




**Important:** Connections to Data Integration Server version 8.2 and previous versions are not supported.

## Editing Data Connections

To edit data connections, complete the following steps:


1. From the Data Management Studio user interface, click the **Data Management Servers** riser to access the Data Management Server Manager.
2. Click the name of the server for which you want to manage connections. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.






3. In the Information pane, on the **Data Connections** tab, select the name of the data connection that you want to edit and click **Edit** .
4. In the dialog that opens, make the desired changes and click **OK**. The connection type will determine which fields and options are available for you to edit.

## Managing ODBC Credentials

You can manage credentials on the Data Management Server Manager. This includes creating, editing, and deleting saved credentials. To manage ODBC credentials, complete the following steps:


1. From the Data Management Studio user interface, click the **Data Management Servers** riser to access the Data Management Server Manager.
2. Click the name of the server for which you want to manage connections. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
3. In the Information pane, on the **Data Connections** tab, click **Manage ODBC Credentials** .

You can perform the following tasks in the **Manage ODBC Credentials** dialog:

- Click **New ODBC Credentials**  to create new ODBC credentials. Enter the ODBC DSN, user name, and password. Then, click **OK**.
  - Select a credential name and click **Edit ODBC Credentials**  to make changes to the user name or password that will access the ODBC DSN.
  - Select a credential name and click **Delete ODBC Credentials**  to remove the ODBC credentials.
4. When you are done managing the ODBC credentials, click **OK**.

## Deleting Data Connections

To delete data connections, complete the following steps:

1. From the Data Management Studio user interface, click the **Data Management Servers** riser to access the Data Management Server Manager.
2. Click the name of the server for which you want to manage connections. If you are prompted, log on to the server by entering your user ID and password, and then click **Log On**.
3. In the Information pane, on the **Data Connections** tab, select the name of the data connection that you want to delete and click **Delete** .
4. Confirm that you want to delete the data connection by clicking **Yes**.

# Dialog Reference

The following topics provide information about the DataFlux® Data Management Server Manager (Data Management Server Manager) dialogs and windows.

- [Server Definition Dialog](#)
- [Import From Repository Wizard](#)
- [Export to Repository Wizard](#)
- [Test Real Time Data Service Dialog](#)
- [Test Real Time Process Service Dialog](#)

## Server Definition Dialog

You can use the **Server Definition** dialog to create server definitions on the Data Management Server Manager. Use the **Server Definition** dialog to modify existing server definitions. The following fields are available while creating or editing server definitions:

**Name** — Specifies the name of the server definition.

**Description** — Specifies a description for the server that is being defined. This field is optional.

**Server** — Specifies the hostname or IP address of the Data Management Server.

**Port** — Specifies the port number that is used by the Data Management Server.

**Domain name** — Specifies the domain on which the DataFlux Authentication Server credentials reside for the Data Management Server. This field is optional.

**Test Connection**— Click this button to test the connection to the server that is defined in the **Server** field.

## Import From Repository Wizard

You can use the **Import From Repository** wizard to import items from the repository, into the selected Data Management Server. The following dialogs are available while importing items:

- [Import Items Dialog](#)
- [Import Location Dialog](#)
- [Import Status Dialog](#)

## Import Items Dialog

You can select one or more tree items from the repository. The following list is available:

**Items** — Displays a tree view of the repository that you can navigate to select one or more items to import. All items are show, **except** the following types:

- Data exploration
- Task
- Profile
- Business Rule



**Note:** To use these types of objects in a Data Management Server, you must setup a shared metadata repository. Contact your administrator for details.

Click **Next**. The **Import Location** dialog opens.

## Import Location Dialog

You can specify where the items will be imported. The following lists and buttons are available:

**Data management server** — Specifies the server onto which you want to import the selected items. The available options are servers that are configured on the system.

**Location** — Specifies which directory on the Data Management Server to import the items. The list is populated with the directory structure that exists on the Data Management Server.

**New Folder** — Creates a new folder into which you can import items. At the end of the import process, if nothing has been imported into the folder, it will not be visible. This is because the Data Management Server only supports folders that contain items.

Click **Back** to go back to the **Import Items** dialog.

Click **Import** to import the items into the selected folder. The **Import Status** dialog opens.

## Import Status Dialog

You can view the status of the import operation. The following lists are available:

**Log** — Displays the log entries, errors, and warnings.

**Show** — Specifies the level of logging to display.

Click **Stop** while the import is processing, to cancel the operation.

# Export to Repository Wizard

You can use the **Export to Repository** wizard to export items from the repository, into the selected Data Management Server. The following dialogs are available while exporting items:

- Export to Folder Dialog
- Export Status Dialog
- Item Already Exists Dialog

# Test Real Time Data Service Dialog

You can use the **Test Real Time Data Service** dialog to run a real-time data service. The input field is populated with the fields that are found in the external data provider node. The output is generated after the job runs and is populated with the job results. The following buttons are available while testing data services:

## Data Inputs and Outputs Tab

**New Row** — Allows you to add a new data row. The values are empty strings that will be passed to the service for processing.

**Delete Row** — Allows you to delete the rows containing the selected cells.

**Delete All** — Allows you to delete all rows.

**Import From File** — Imports data from a `.csv` file. If necessary, additional rows are added to match the number of imported rows. However, since columns are read-only on this tab, columns cannot be created during the import; any extra columns in the file will be ignored.

## Variable Inputs and Outputs Tab


**Insert New Variable** — Opens the **New Variable** window, where you can specify a variable name. While you can specify any variable name, only meaningful variables will be used during the run.

**Edit Value** — Allows you to edit the value of one or more selected variables.

**Delete** — Allows you to delete one or more selected variables.

**The following buttons apply to both tabs:**

Click **Test** to run the job. Outputs from the job display in the **Data outputs** and **Variable outputs** fields when the job is done running. If the job does not finish processing in the timeout period, you will receive an error message. You can change the timeout value by

clicking **Options** . Then, click the **Data Management Server** tab and update the value of the **Real-time service test timeout** option.

Click **Close** to exit the dialog.

Click **Stop** while the test is processing. The previous run continues on the server, but the results will no longer be displayed.


## Test Real Time Process Service Dialog

You can use the **Test Real Time Process Service** dialog to run a real-time process service. The variable input field is populated with the fields that are defined on the service job. The variable output is generated after the job runs and is populated with the job results. The following buttons are available while testing process services on the **Variable Inputs and Outputs** tab:

**Insert New Variable** — Opens the **New Variable** window, where you can specify a variable name. While you can specify any variable name, only meaningful variables will be used during the run.

**Edit Value** — Allows you to edit the value of one or more selected variables.

**Delete** — Allows you to delete one or more selected variables.

Click **Test** to run the job. Outputs from the job display in the **Variable outputs** field when the job is done running. If the job does not finish processing in the timeout period, you will receive an error message. You can change the timeout value by clicking **Options** . Then, click the **Data Management Server** tab and update the value of the **Real-time service test timeout** option.

Click **Close** to exit the dialog.

Click **Stop** while the test is processing. The previous run continues on the server, but the results will no longer be displayed.

# Glossary

## A

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### **API**

An application programming interface (API) is a set of routines, data structures, object classes and/or protocols provided by libraries and/or operating system services in order to support the building of applications.

## O

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### **ODBC**

Open Database Connectivity (ODBC) is an open standard application programming interface (API) for accessing databases.