

Pervasive Data Integrator, v10 Cloud Edition Quick Start Guide

The purpose of this quick start guide is to walk you through the steps for creating and running an integration using Pervasive Data Integrator, version 10 Cloud Edition. It has these sections:

- Reviewing how it works
- Getting help
- Logging in
- Navigating the management console
- Designing your project
 - Launching Design Manager
- Creating an integration
- Creating your runtime configuration
- Running your runtime configuration
- Monitoring your integration
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Reviewing How it Works

The Cloud Edition of Pervasive Data Integrator (DI) is hosted on Pervasive DataCloud2, an on-demand services platform that allows development and management of integration solutions. As a SaaS (software as a service) application, DI provides the environment for integration development (Design Manager) and engines that run the integrations.

DI is accessible through the DataCloud2 Management Console, a browser-based web interface where users can launch the DI Design Manager and manage integrations. The basic process for creating integrations is as follows:

- From Design Manager, create your design. When your design is complete, create a release and deploy your project. The project is packaged in the form of a .djar file.
- From the DataCloud2 Management Console, create an integration.
- For the integration, create a runtime configuration and add your package. You can then create and run numerous runtime configuration scenarios (for example, development and production configurations).
- From the Dashboard you will be able to monitor integrations and view logs.

Getting Help

If you have questions, you can submit a support ticket online or by telephone:

- Contact support

- [Online tickets](#)
- 800-287-4383 (toll free) or 512-231-6000
- View self-help
 - From the management console, choose **Resources** and view v10 Help.

Logging In

Logging in to the DataCloud2 Management Console requires a web browser and Internet access.

- 1 Use the **key** and **custom Pervasive DataCloud2 web site link** you would have received in a separate e-mail to create an account. Once setup is completed, you are redirected to your Pervasive DataCloud2 instance.
 - 2 On the Login screen, type your new Pervasive user name and password.
 - 3 Click **LOGIN** and the Management Console appears.
- 1 The URL for subsequent access is <https://datacloud2.pervasive.com>.

Navigating the Management Console

>> To navigate to the console home page:

- Click the **Pervasive DataCloud2 graphic** at the top left of the console



>> To access your Integrations:

- 1 Click **Integrations** on the left panel to expand a list of integrations. Click to do any of the following:
 - View and edit integration details.
 - Manage your runtime configurations.

>> To view Resources:

- 1 Click **Resources** in the left panel to expand the list of available options. Click to do any of the following:
 - Run a Report on v 10 Integrations.

- View v10 Help.

>> **To monitor integration activity:**

- 1 View the **Dashboard** in the center of the console.
 - First-time users will see a Welcome message. After creating your first integrations, you will see integration status and current activity.

>> **To launch the Design Manager:**

- 1 Click the Design icon on the top right of the console.

Designing your project

DI is used to build the processes, maps, and packages you'll need for execution. You should have a solid understanding of Data Integrator before you begin. Click **Resources** in the left panel for help.

Launching Design Manager

Use Design Manager to create a project, design your integration, create a release for your integration, then package and deploy it.

- Click the **Design** icon to launch Design Manager.

When first launched, it may take a few minutes for Design Manager to open. After 30 minutes of inactivity, the instance will automatically shutdown. Just launch again to reopen.



- For help with Design Manager, click the help icon on the toolbar from within Design Manager.



Note You must create a project release, then package and deploy the project from within Design Manager before creating an integration through the management console. For instructions on doing so, see the Design Manager online help. When you have finished, sign out of the Design Manager.

Creating an integration

Once packaged and deployed, a project from the Design Manager generates a package file in the form of a .djar file that can then be used for an integration.

- 1 From the left panel, click the **+** on **Integrations**.

The **Create a New v10 Integration** screen appears.

- 2 Type an **Integration Name** and **Integration Description** for your integration.

Other options can be configured later.

- 3 Click **Create this Integration**.

You should receive a message that the integration was successfully created.

- 4 Your integration now appears in the Integrations list in the left panel.

Creating Your Runtime Configuration

A runtime configuration contains the necessary settings required to execute your integration.

- 1 From Integrations in the left panel, click **View Configurations** in the **Manage Your Runtime Configuration** section to view configurations for the current integration.

- 2 Click **Add New Configuration** to create a new one.

- 3 Set the following in the fields provided:

- A **name** for the current runtime configuration.
- **Start and stop dates**. The configuration will not run before the effective date and will expire after the stop date.
- A **schedule** for running the configuration every, day, week, or year, at times that you specify. If you don't specify a schedule, the configuration will only run on demand.
- Click **Add New Configuration**

- 4 Click **Create this Runtime Configuration**.

You should receive a message that the integration was successfully created.

- 5 Set the following in the fields provided:

- **Browse Your v10 Releases and Select a Package** to add a deployed .djar package release. As needs change, you can later choose to change your package (for example, to run a new release on a test server while an older release is in production).

- The **entry point** refers to the top level map or process which should be run first to start the integration and run dependent processes and maps. All maps and processes will be listed so you will need to know which item will be the entry point based on your design.





6 Click **Update this Runtime Configuration**.

You should receive a message that the Runtime Configuration was updated successfully. The next step is to run your runtime configuration.

Additional Options

- **Runtime configuration macros** from your integration design. These will be used during configuration but aren't automatically included unless you enter their names and values here.
- **Additional files** to upload. Browse to find and select the files.
- You can grant other users access to your runtime configuration. Enter the User ID of the user you want to **grant permissions** and assign read, write, and execute permissions as needed.

Running Your Runtime Configuration

- 1 From Integrations in the left panel, click **View Configurations** in the **Manage Your Runtime Configuration** section to view configurations for the current integration.
- 2 Click **View Configurations** to view all configurations for the current integration. You can  run,  edit,  view logs, and  delete runtime configurations.
- 3 Click the **Run** icon to run a specific configuration on demand.
- 4 The **Dashboard** will appear.

Additional Options

The Runtime Configuration details page also displays options for creating a new configuration, editing a configuration, and viewing and managing logs.

- Click **Add New Configuration** to add a new configuration.
The system takes you back to the Add New configuration page.
- Click **Edit** to edit an existing configuration.
The system takes you back to the Runtime Configuration page to enter changes.
- Click **View Log** to view the log and manage log options.

The screen displays the logging information for the current configuration:

- Log Options. By default all log options are selected. Select or clear a check box to turn on or off the display of an option.

- A list of log files by execution start time for the current configuration. Select a file name from the list to display its contents in the center of the screen.
- Click **Launch Fullscreen View** to view the log file in the full screen.
- Click **Download This Log** to download a log file (for example, to send it to Support).

Monitoring Your Integration

Access the **Dashboard** at any time to monitor your integration activities from the DataCloud2 Management Console by clicking the **Pervasive DataCloud2 graphic** at the top left of the console.



- **Recent Executions** in the top panel lists execution details of integration projects that are queued, starting, running, or finished. You'll find the Integration name, Configuration, Scheduled Time, Duration, and Status. Click on the Integration name or Configuration name to drill down further.
- **Current Activity on Your v10 Instance** in the bottom panel shows the status of a running integration package. For each step of an integration package you will see the Time a Step was started, the Step name, step Status, success or failure Result Code and processed Record Count.
- Clicking **Refresh** updates the recent execution status.

Glossary

Additional Files

If your design requires extra files to execute certain logic you can upload them to your configuration. For example, a file containing data the design needs to perform lookups against may be needed as an additional file.

Configuration

See Runtime Configuration.

Dashboard

A central location on the DataCloud2 Management Console home page from where you can view integration activities and execution status.

Deploy

The action to deploy a project results in the movement of the .djar package from design to run-time by making the package available for assignment to a runtime configuration.

Design Manager

The Design Manager is the interface from which you design integrations. You can:

- Create and organize projects and artifacts in a design repository.
- Create artifacts such as processes, maps, datasets, and schemas.
- Launch editors to create logic in maps, schemas, processes, and other artifacts which make up an integration.
- Create project releases which can be packaged and deployed.
- Perform metadata searches.

.djar file

An archive package file containing all the artifacts needed to run a transformation. The file has the extension .djar.

Entry Point

In a runtime configuration, the entry point is the top level process or transformation map to run within a package. It starts the execution of an integration logic flow. For example, a parent process may call subordinate processes or maps. Whereas a map might be

designed to stand alone and start the execution of the design logic with no parent or subordinate process.

Execution

An integration that is running or has been run.

Integration

A deployed package that is ready to run as an integration. It has a unique name and an associated run-time configuration.

Integration Macros

Macros save certain string values for reuse throughout Data Integrator. The main reason to use a macro is to redefine a text string that a macro refers to, without having to change your original map or process. For instance, you can dynamically change a database name at run time by overriding the macro value in an integration or runtime configuration.

A common scenario is to use **Integration Macros** to specify developer user/password/server credentials in one runtime configuration and production credentials in another runtime configuration. Each configuration provides two different ways to run the same integration.

Macros can be specified in an integration or runtime configuration. They are not automatically included unless you enter their names and values.

Package

A deployed executable. Package usually refers to an integration design deployed to a Pervasive DataCloud2 Integrator server instance. The format of a package is a .djar file.

Project

A project contains artifacts created in Design Manager. You can have more than one project and a project typically contains related artifacts referring to a customer, use case, or other logical purpose.

Release

A release is a snapshot of a project where each snapshot is identified by a version control number starting with 1.0.

Repository

A repository is an organizational container which stores integration design projects and their artifacts. You can have more than one repository.

Runtime Configuration

A runtime configuration contains the necessary settings required to execute your integration. Inside a configuration you may choose to use or overwrite certain integration settings using Macros. Adding additional lookup or other files needed by the integration can be made available. You may also schedule executions from within a configuration.

As a “best practice” we recommend you create at least two runtime configurations for each integration; one for development and one for production.

Step

Steps are the building blocks in a process created in Design Manager. A simple process may contain only a Start and Stop step with a Transformation step to execute. Alternately, a process may be more complex and include Decision steps with true and false paths, Process steps that call other processes, or Queue steps that call message queue sessions.

User Permissions

You have the ability to grant other users access to your runtime configuration. Enter the User ID of the user you want to grant permissions and assign read, write, and execute permissions as needed.