Working with DEFA

Intellicus Enterprise Reporting and BI Platform

Dated: July 2013

Acknowledgements

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: http://www.intellicus.com/acknowledgements.htm

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Installing DEFA

The DEFA setup is available in a zip file. You need to unzip this and run 'IntellicusDEFA<version>_win<architecture>.exe' file. This invokes the installation wizard that guides you through the installation process.

Figure 1 shows the **Welcome Screen**. Click the **Next** button to proceed. **License Agreement** screen appears.
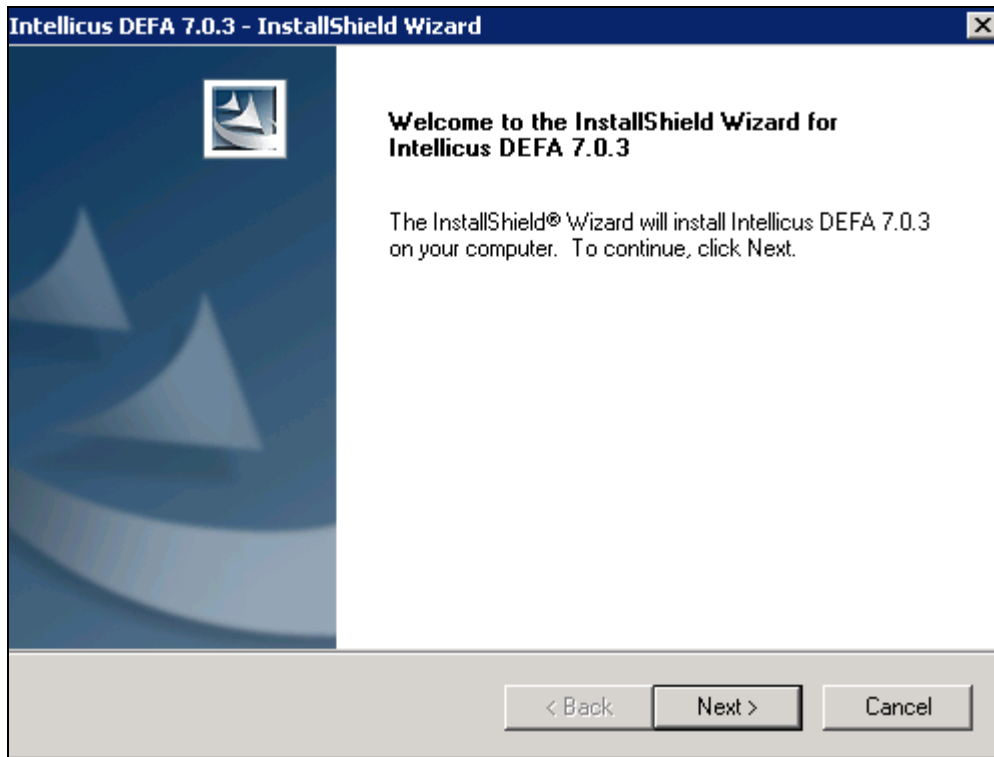

Figure 1: Welcome Screen

Figure 2 shows the **License Agreement** screen.

> **Tip:** To abort the installation process, at any stage of installation, you can click the **Cancel** button.
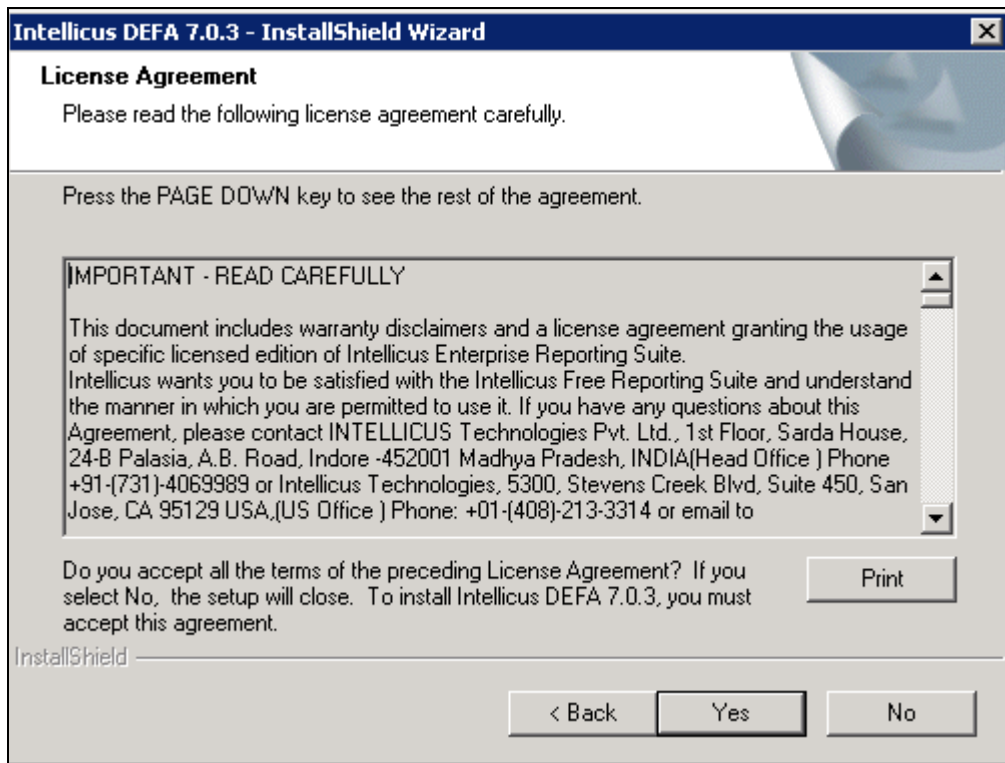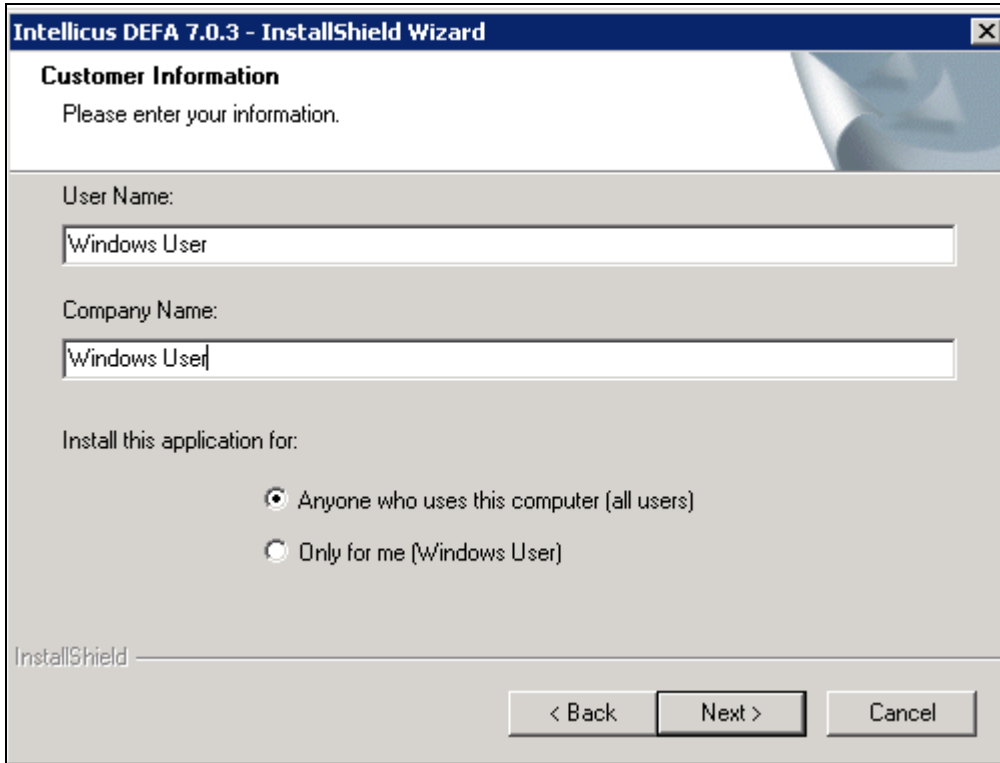
Figure 2: License Agreement Screen

Read the License Agreement.

If you agree, then click **Yes** button to proceed to the **Customer Information** screen.

Figure 3 shows the **Customer Information** Screen.

Figure 3: Customer Information

User Name/ Company Name

Please specify the User Name and the Company Name.

User has an option to install this application for use by either all users (Select Anyone who uses this computer) or only by the administrator (Select only for me).

Click **Next** to move onto the next screen.

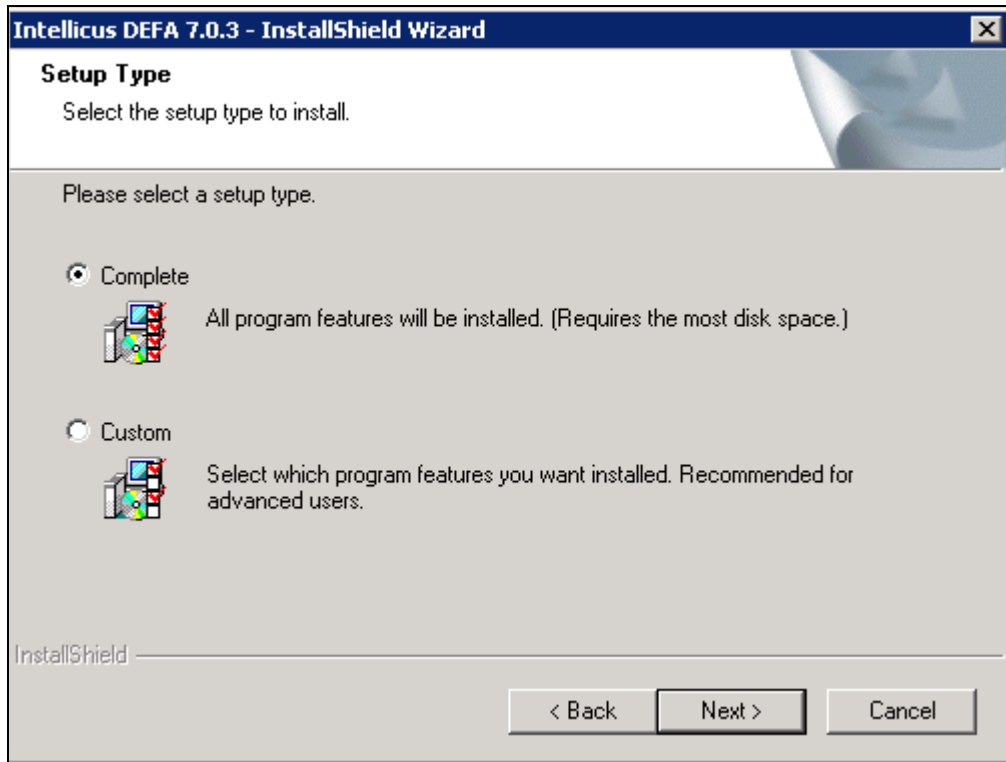Figure 4 shows **Installation Options** screen.

Figure 4: Installation Options

Complete Install

Select this option to:

- Install the DEFA component.
- Install DEFA at the default location set in the installation program.

Custom Install

Select this option to:

- Install the DEFA component.
- Select the location to install DEFA.

Click **Next** to proceed to **Installation Location** screen.
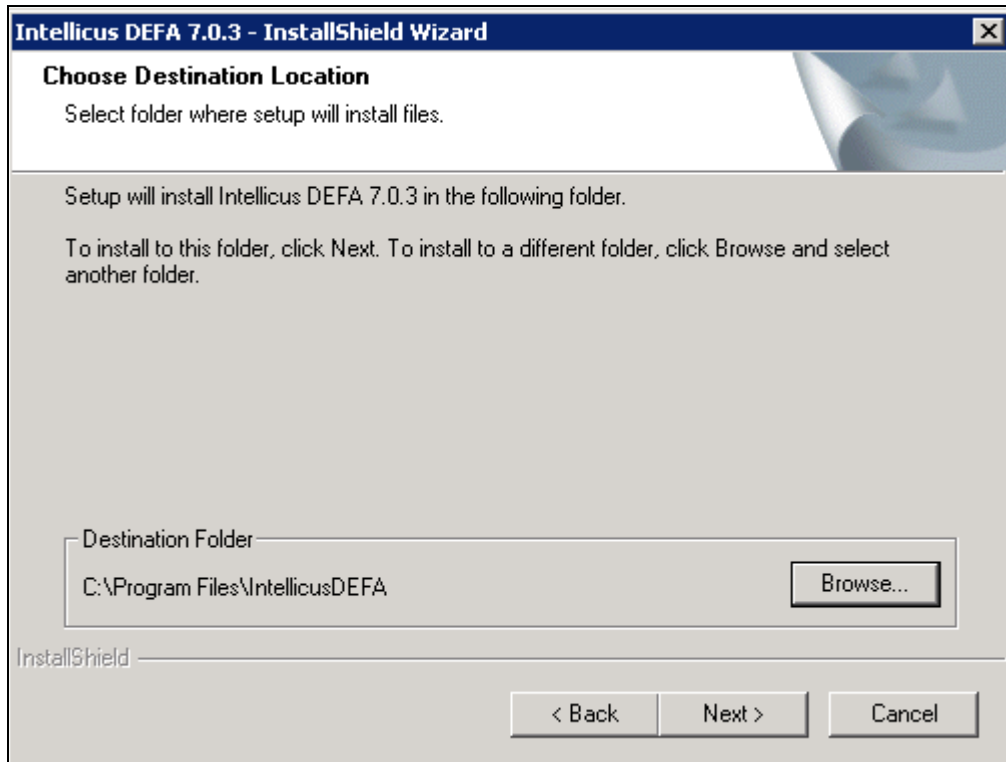
Figure 5: Option to change the destination folder

By default, the application is installed at path: C:\Program Files\IntellicusDEFA. User has the option to either go with the default destination location or specify a different destination (installation) location. Click **Browse** and specify the destination location to change it.

When you click **Browse** button, **Choose Folder** screen appears. On this screen, you may specify path in the **Path** area. If you do not remember the path, you can also select it from **Directories** area.

Figure 6: Specifying Installation folder

Specify path in **Path** area or select path by double-clicking and opening respective folders within **Directories** area. Selected path will appear in **Path** area.

Click **OK** to select the path for installation. Click **Next** to go onto the **Select Features** screen.

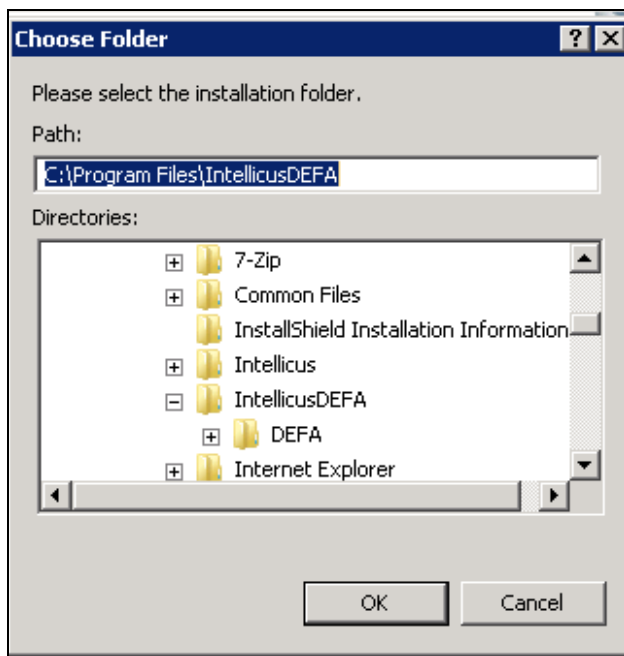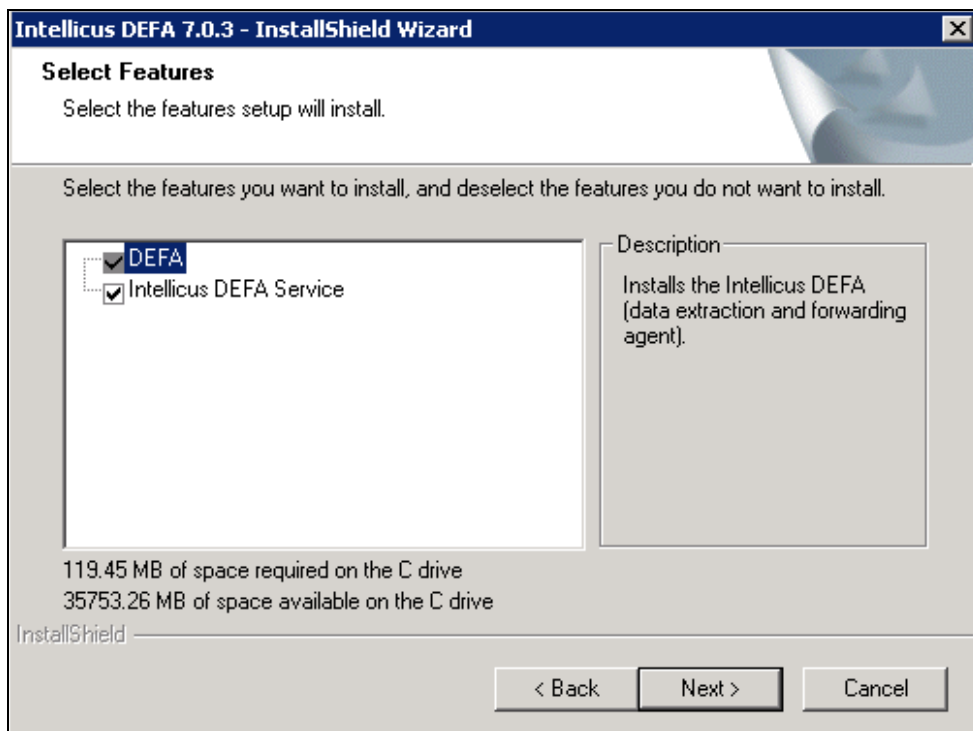Figure 7: Select one or more components to install

> **Tip: Select Components to Install** screen also displays the required and available hard disk space for the selected components. You can utilize this information to judge the system requirements.

Select DEFA component and click **Next** to proceed to **Ready to Install the Program** screen.
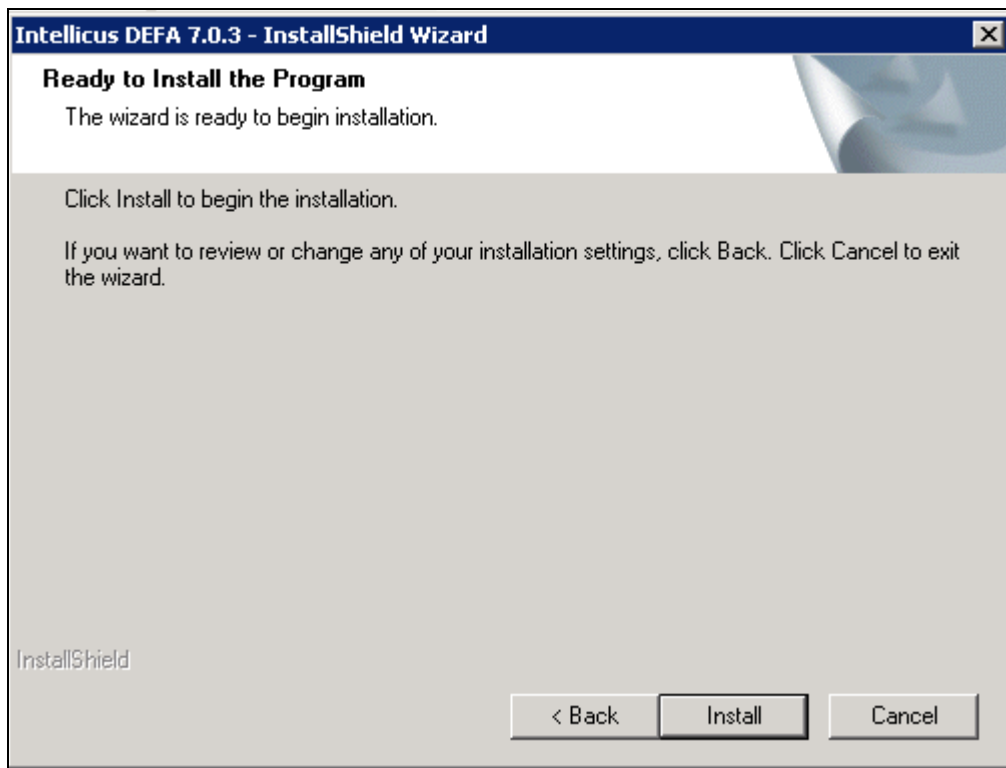
Figure 8: Review the installation preferences screen

Verify the information that is provided. Click **Back** to go back and change any settings if required.

Click **Next** to go onto the **Installation Progress** screen.
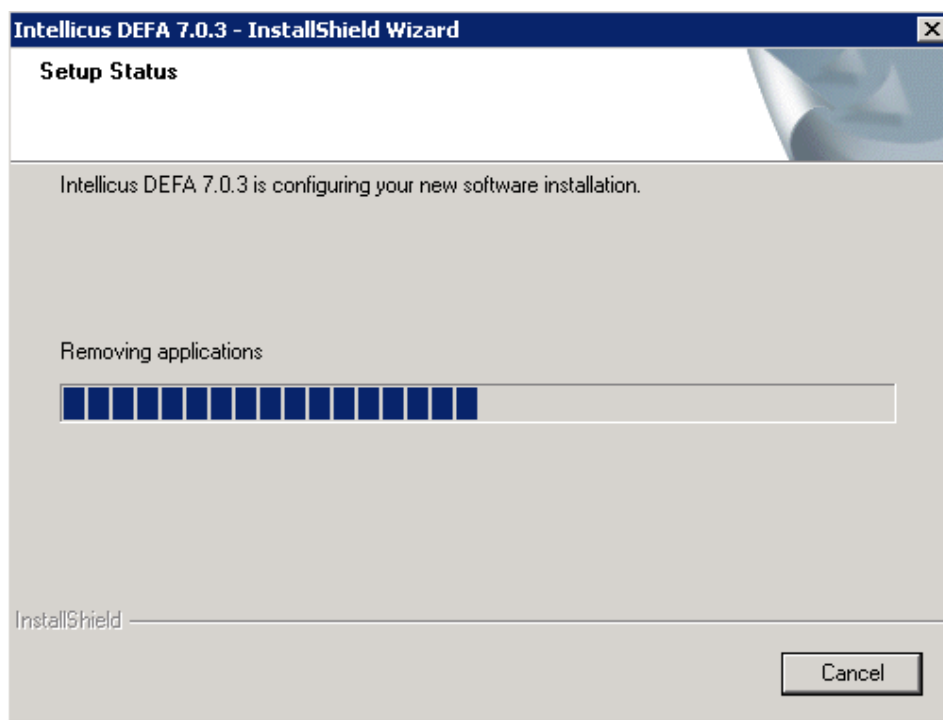
Figure 9: Installation Progress screen

After the installation is complete, **InstallShield Wizard Complete** screen will popup.
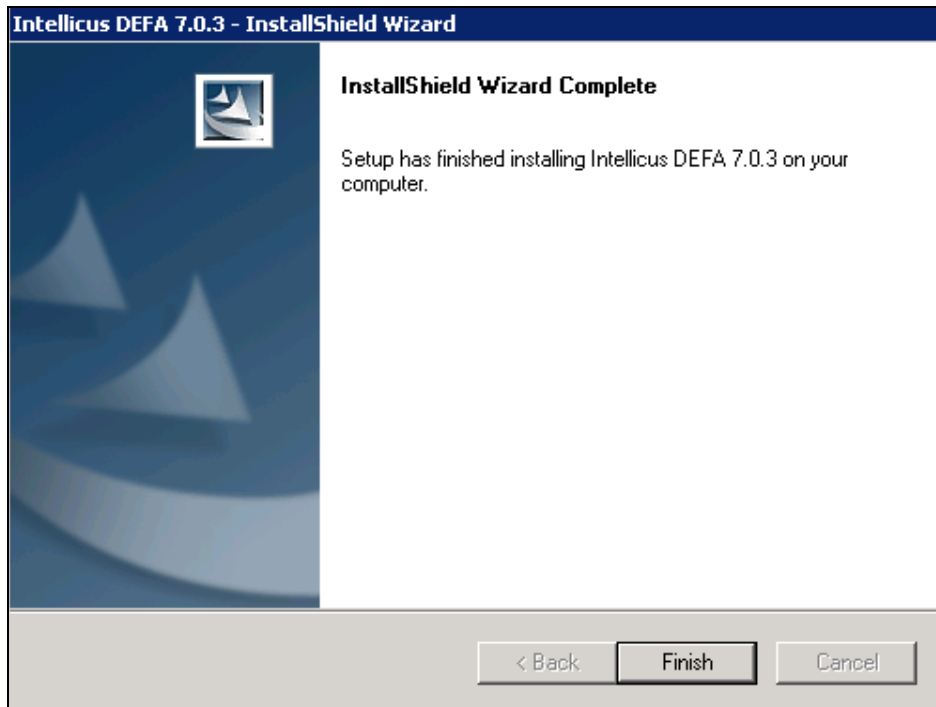
Figure 10: Installation Wizard Complete

Click **Finish** to complete the installation of the DEFA component on your machine.

Post-Installation Instructions

The installation process creates the following folders in the installation folder:

Figure 11: IntellicusDEFA Folder Structure

- You can start DEFA immediately after the installation from under Start > All Programs > Intellicus > IntellicusDEFA > Start DEFA.
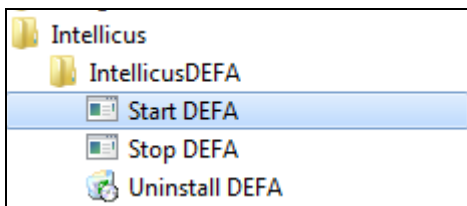
Figure 12: Options in IntellicusDEFA menu

The DEFA Server will now start automatically when you restart the machine.

User can check the status of the server under Services.

Configuring DEFA

This section of the document discusses properties related to configuration of DEFA to be able to connect and forward data to Report Server.

You can find the configuration files under …\IntellicusDEFA\DEFA\config folder.

Configuring DEFA Properties

DEFA's configuration is achieved by setting properties associated with it.

DEFA Name
This is the unique identifier of the DEFA Agent.
Syntax: DEFA_NAME = [] (String)
Default: Intellicus
Example: DEFA_NAME=Intellicus

Server URL
In case the Report Server uses a Web Server, this is the URL of Web Server to which DEFA will connect and forward data.
Syntax: SERVER_URL = [] (String)
Default: blank
Example: SERVER_URL= http://192.168.152.86:90/server

Server IP
This is the IP address of Report Server to which DEFA will connect and forward data.
Syntax: SERVER_IP = [127.0.0.1] (String)
Default: 127.0.0.1
Example: SERVER_IP=127.0.0.1

In case both Server URL and Server IP are provided, it takes address from Server URL by default.

Server Port
IP Port of Report Server to which DEFA will connect and forward data. Valid value for the port is any integer greater than zero.
Syntax: SERVER_PORT = [45450] (int)
Default: 45450
Example: SERVER_PORT=45450

Server Time Out
This is the time in seconds after which the DEFA connection will be closed, if not used for that many seconds. Valid value for this timeout is any integer greater than zero.
Syntax: SERVER_TIME_OUT = [45450] (int)
Default: 60
Example: SERVER_TIME_OUT=60

Listener Port

The port at which the DEFA server is listening. Should be unused by any other program on this machine. This port is used for shutdown request.
Syntax: LISTENER_PORT = [1024] (int)
Default: 45460
Example: LISTENER_PORT=45460

Log Files
The log file directory to keep the log files. The log filename is DEFAAgent.log.
Syntax: LOGS = [path] (String)
Default: ../logs
Example: LOGS=../logs

Log Level
The debug level for logging indicates the level of criticality to be considered for logging.
Syntax: LOGLEVEL = [TRACE, DEBUG, INFO, WARN, ERROR, FATAL] (String)
Default: ERROR
Example: LOGLEVEL=ERROR

Retry Enabled Flag
This flag (when true) facilitates a retry action in case data extraction or forwarding has failed. This failure can be due to scenarios like DEFA is unable to connect to database for data extraction, unable to connect to Report Server or unable to read/write file.
Syntax: RETRY_ENABLED = [TRUE, FALSE] (String)
Default: TRUE)
Example: RETRY_ENABLED=TRUE

Retry Count
This is the number of times retry should be performed once data extraction or forwarding has failed. In the following example, after Retry Count has reached value 3, DEFA would pick the next schedule.
Syntax: RETRY_COUNT = [3] (int)
Default: 3
Example: RETRY_COUNT=3

Retry Frequency
The Retry action should be performed after this frequency specified in seconds.
Syntax: RETRY_FREQUENCY = [>0] (int)
Default: 60
Example: RETRY_FREQUENCY=60

Uninstalling DEFA

Use **Add/Remove Programs** window in the Control Panel to uninstall DEFA.

Click Start > Control Panel > Programs and Features

Figure 13: Uninstalling Intellicus DEFA
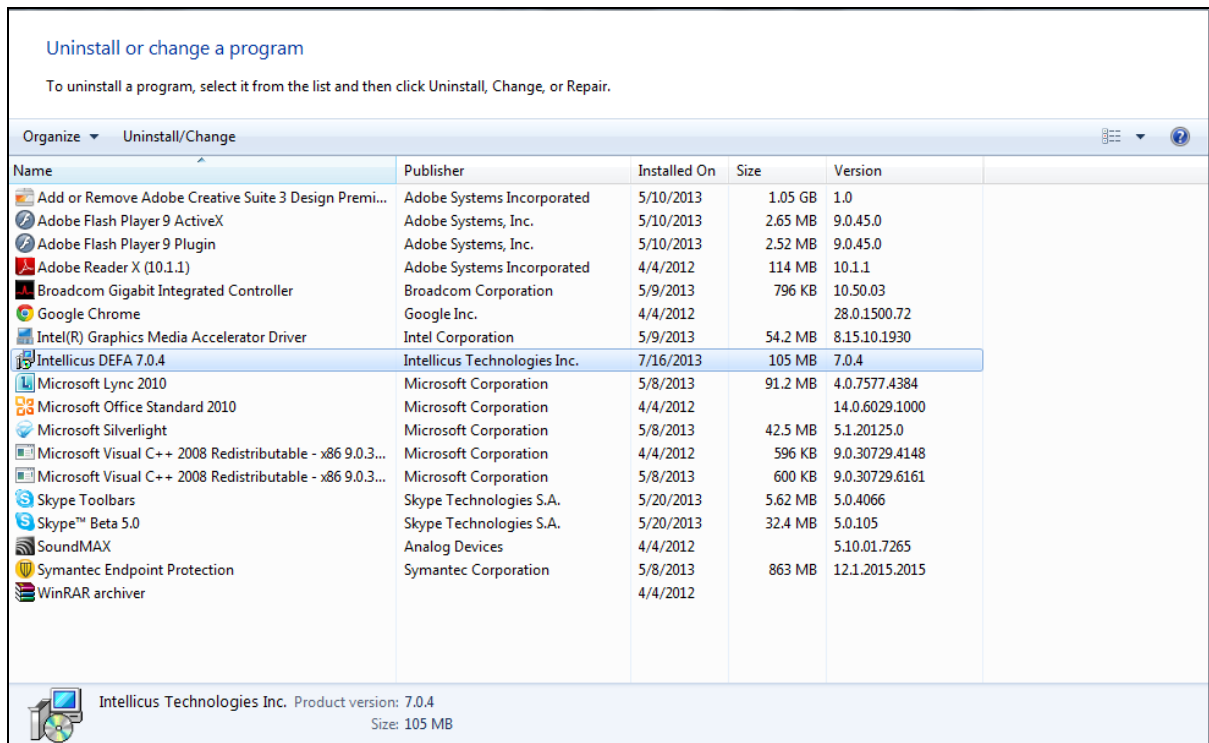
Select **Intellicus DEFA <version>** and click the 'Uninstall/Change' button.

The dialog box **Welcome** appears, as shown in the figure below. Select **Remove** and click **Next**. The **Confirm Uninstall** screen appears. Click **OK** to start uninstall process.

> **Tip:** You can also start uninstall process by clicking Start > All Programs > Intellicus > IntellicusDEFA > Uninstall DEFA.
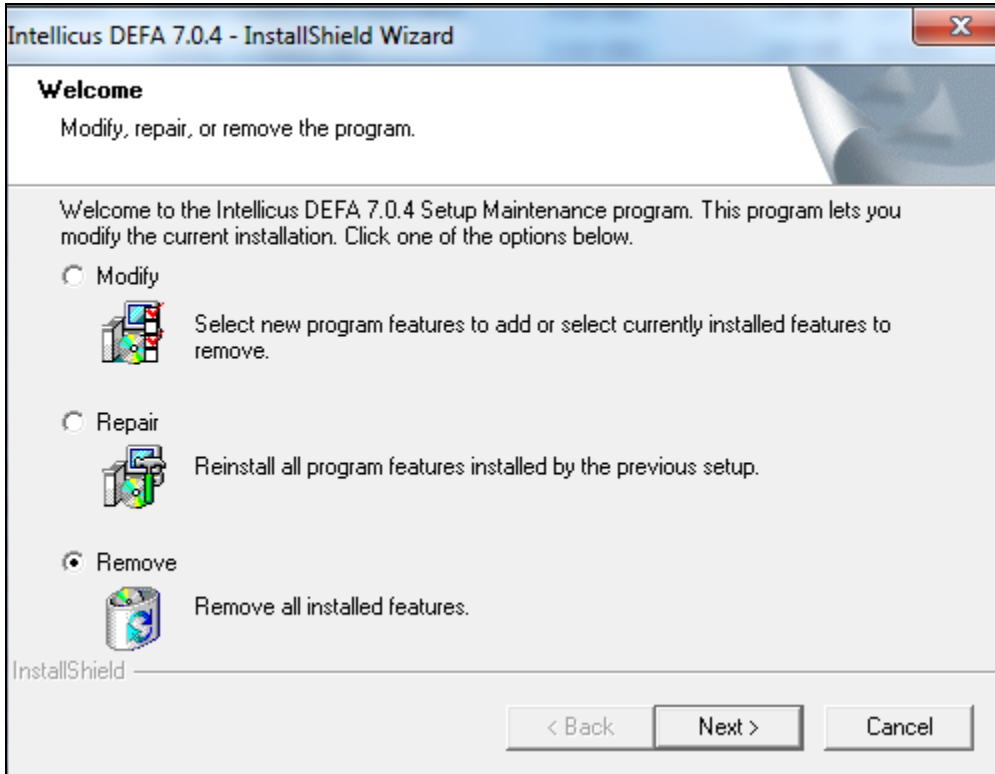
Figure 14: Modify, Repair, or Remove Program

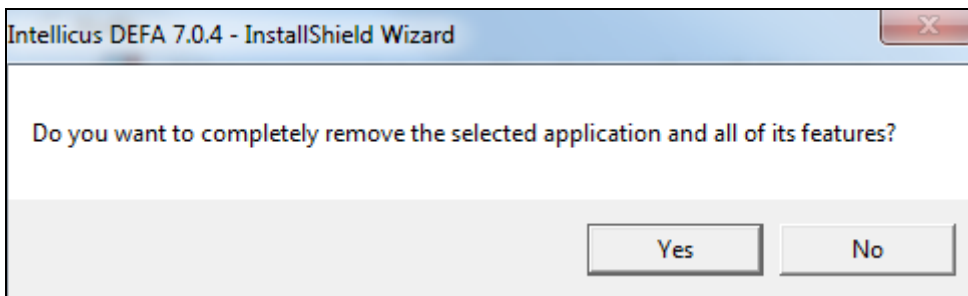**Note:** You can modify, remove or re-install DEFA.

Figure 15: Uninstall Confirmation

Click **Finish** upon completion of uninstall.

Registering DEFA

Once you have obtained the license for DEFA, you would be able to see the DEFA tab under Administration > Configure.

You can now register DEFA connection to connect to Intellicus Report Server.

Click the ➕ button to add a new DEFA instance. Provide properties as described in the DEFA Properties table and click the **Save** button in order to save this DEFA instance.

Figure 16: Registering DEFA

DEFA Properties

Property	Values	Comments
DEFA Name	Type Yourself	Name of the DEFA instance
DEFA Connection	Select from list	Connection specifications to be used by DEFA to extract data. Select from already created connections upon clicking the **Configure Connections** button
Heartbeat Interval	Specify value in hr:min:sec format	Time interval upon which DEFA sends a status message of being alive to Report Server. Default: 00:00:30
Metadata Refresh Interval	Specify value in hr:min:sec format	Time interval to sync DEFA with data extraction query details from Report Server.

		Default: 00:02:00
Last Data Forwarded On	Auto-generated	Time of last data forward
Last Data Extracted On	Auto-generated	Time of last data extract
Last Communication On	Auto-generated	Time when DEFA last communicated with the Report Server
DEFA Status	Auto-generated (Active Inactive)	Active = DEFA is active when Heartbeat Interval + Last Communicated Time < Current Time at Report Server
DEFA Version	Auto-generated	Version of the installed DEFA

DEFA Action Items

Button	Actions
Stop Extracting Data	When metadata is refreshed, DEFA would stop extracting data upon getting this information
Stop Forwarding Data	When metadata is refreshed, DEFA would stop forwarding data to Report Server upon getting this information

Note: To know about DEFA step in Query Object, please refer WorkingwithQueryObjects.doc