

# **Visual Flow User Guide**

*February, 2023*  
*Version 1.2.0*

## Document Revisions

Date	Version	Document Changes
12/08/2020	0.9.2	Initial Draft
22/04/2021	0.9.3	Pipeline Operations
26/04/2021	0.9.4	Job Operations
07/05/2021	0.9.5	Project Name, Project Operations
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13/11/2021	0.9.9	New Data Storages
22/11/2021	0.9.10	New Data Storage
15/12/2021	0.9.11	Logs levels
29/12/2021	0.9.12	Cache stage, Job Operations
21/01/2022	0.9.13	New Data Storage, Stage descriptions
04/02/2022	0.9.14	Description of STDOUT storage
18/02/2022	0.9.15	Truncate mode
04/03/2022	0.9.16	Full query mode in Transformer stage
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01/04/2022	0.9.18	Password component
08/08/2022	0.9.19	Style and verification updates to all chapters
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27/09/2022	1.0.0	Updates for release 19.09.2022 and new design
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05/02/2023	1.2.0	Updates for release 01.01.2023

## Revision Details

Version	Updates
0.9.19	Chapter 3.1 split into “3.1. Getting Started” and “3.2. Create Project”
0.9.19	”4.2. Create a job” updated to “4.2. Create a job.Available Stages” and broken down to multiple sections per each stage
0.9.19	Added section 3 for Connections to “3.3. Manage Project Settings”
0.9.19	Updated screenshots for Jobs list and Pipelines list
0.9.19	Style and verification updates to all chapters
0.9.20	Added Slice Stage and updates to “4.2.1. Read Stage” and to “5.2. Create a Pipeline ”
1.0.0	Added User profile menu to “3.1. Getting started”

1.0.0	Updated all screens as per new design
1.0.0	Added Job History to jobs overview actions
1.0.0	Added chapter “5.5. Scheduling a pipeline”
1.0.0	Added about Job History to “4.4. Job Execution”
1.0.0	Added about copying stages on canvas to “4.3. Job Designer Functions Overview”
1.0.0	Updated “4.2.1. Read Stage”. Added statement about selecting existing connection
1.1.0	Added information about Click house, Dataframe and Local file storages, added Wait stage to “5.2. Create a Pipeline”.
1.1.0	Updated all screenshots and applied format and style corrections to all chapters.
1.2.0	Added chapters about Job Designer stages: Pivot, Add/Update Column, String Functions, Date/Time, Drop/Fill Nulls
1.2.0.	All screens updated due to new functionality (new stages, new action buttons, language switcher, pipeline statuses and color updates)
1.2.0.	Added statements about Suspend/Resume functionality to chapter 5.4. Pipeline Execution.
1.2.0.	Updated chapters about Jobs Overview page and Parameters screen due to redesign

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# 1. Introduction

## 1.1. Terminology

**ETL** is an abbreviation for *extract, transform, load* — three database functions combined into onetool to pull data out of one database, transform it and place into another.

- ✓ **Extract** is the process of *reading data* from a database. In this stage, the data is collected, often from multiple and different types of sources.
- ✓ **Transform** is the process of *converting the extracted data* from its previous form into the form needed to place it into another database.
- ✓ **Load** is the process of *writing the data* into the target database.

A **job** is a chain of individual stages linked together. It describes the flow of data from its source to target. Usually, a job has a minimum of one data input and output. However, some jobs can accept more than one data input and output it to more than one target.

In Visual Flow, the available stages are:

- ✓ Read
- ✓ Write
- ✓ Group By
- ✓ Remove duplicates
- ✓ Filter
- ✓ Transformer
- ✓ Sort
- ✓ Slice
- ✓ Pivot
- ✓ Add/Update Column
- ✓ String Functions
- ✓ Date/Time
- ✓ Drop/Fill Nulls
- ✓ Join
- ✓ Union
- ✓ Change Data Capture
- ✓ Cache

A **pipeline** is a compound of multiple jobs and can be run. In Visual Flow, the user can use such stages as:

- ✓ Job
- ✓ Container
- ✓ Notification
- ✓ Wait

## 1.2. Scope and Purpose

The Visual Flow web application is the ETL tool designed for effective data manipulation via a convenient and user-friendly interface. The tool has the following capabilities:

- Can integrate data from heterogeneous sources:
  - ✓ AWS S3
  - ✓ Cassandra
  - ✓ Click House
  - ✓ DB2
  - ✓ Elasticsearch
  - ✓ IBM COS
  - ✓ Local File
  - ✓ Mongo
  - ✓ MSSQL
  - ✓ MySQL
  - ✓ Oracle
  - ✓ PostgreSQL
  - ✓ Redis
  - ✓ Redshift
  - ✓ Redshift-jdbc
- Perform data processing and transformation
- Leverage metadata for analysis and maintenance

## 1.3. Process Overview

Visual Flow jobs and pipelines exist within a certain namespace (project), so the first step in the application would be to create a project or enter an existing one. Then you need to enter Job Designer to create a job.

*Job Designer* is a graphical user interface used to create, maintain, execute and analyze jobs. Each job determines the data sources, the required transformations and the destination of data.

*Pipeline designer* is a graphical user interface aimed at managing pipelines. Designing a pipeline is similar to doing so on a job.

Important: When editing stages in the Configuration Panel, to save data a user must click the *Confirm* button, otherwise the data will be lost.

Visual Flow key functions include but not limited to:

- ✓ Create a project which serves as a namespace for jobs and/or pipelines
- ✓ Manage project settings
- ✓ User access management
- ✓ Create/maintain a job in Job Designer
- ✓ Job execution and logs analysis
- ✓ Create/maintain a pipeline in Pipeline Designer
- ✓ Pipeline execution
- ✓ Import/Export jobs and pipelines

## 2. Roles and authorizations

The following roles are available in the application:

- ✓ Viewer
- ✓ Operator
- ✓ Editor
- ✓ Administrator

They enable one to perform the below operations within the namespaces they contain access to.  
Only a *Super-admin* user can create a workspace (project) and grant access to this project.

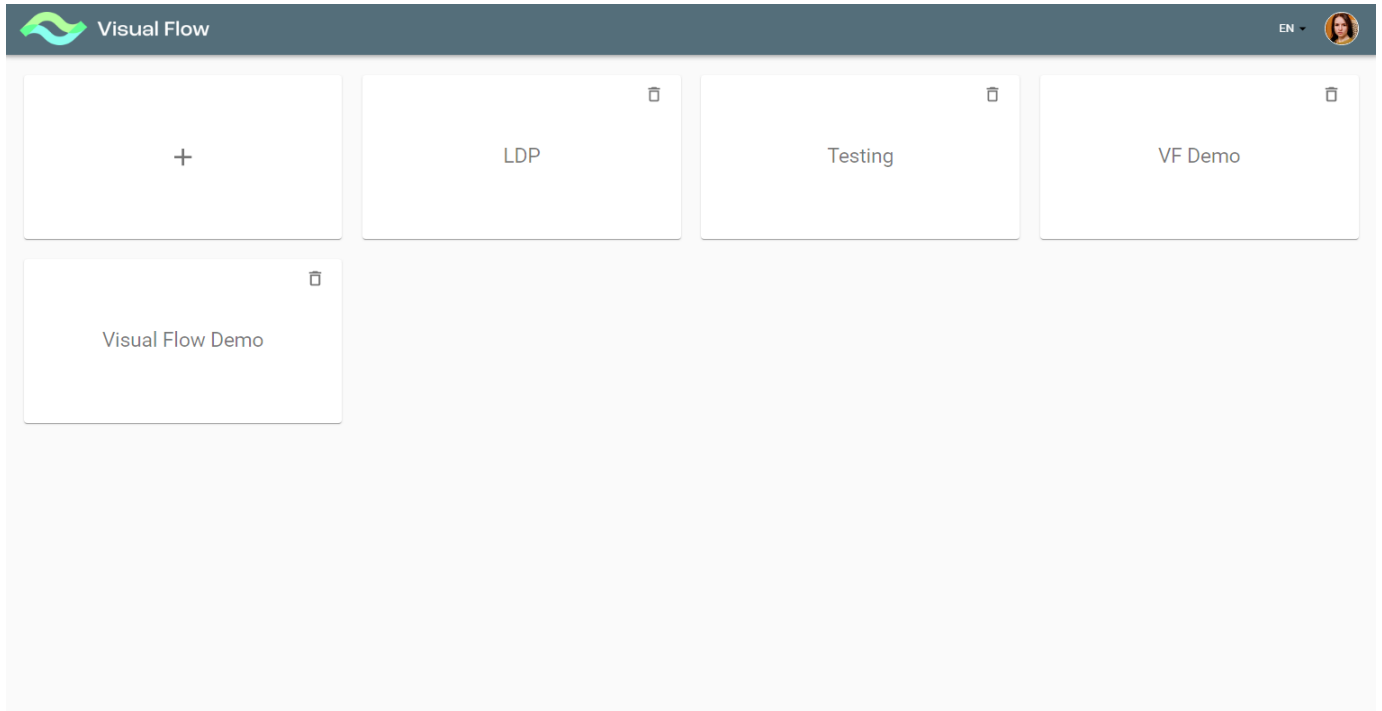
Role	Actions		
	Project Settings	Jobs	Pipelines
Viewer	View All	View All	View All
Operator	View All	View All / execute jobs	View All / execute pipelines
Editor	Edit All but Users/Roles	Edit / execute jobs	Edit / execute pipelines
Admin	Edit All	Edit / execute jobs	Edit / execute pipelines



### 3. Project Operations.

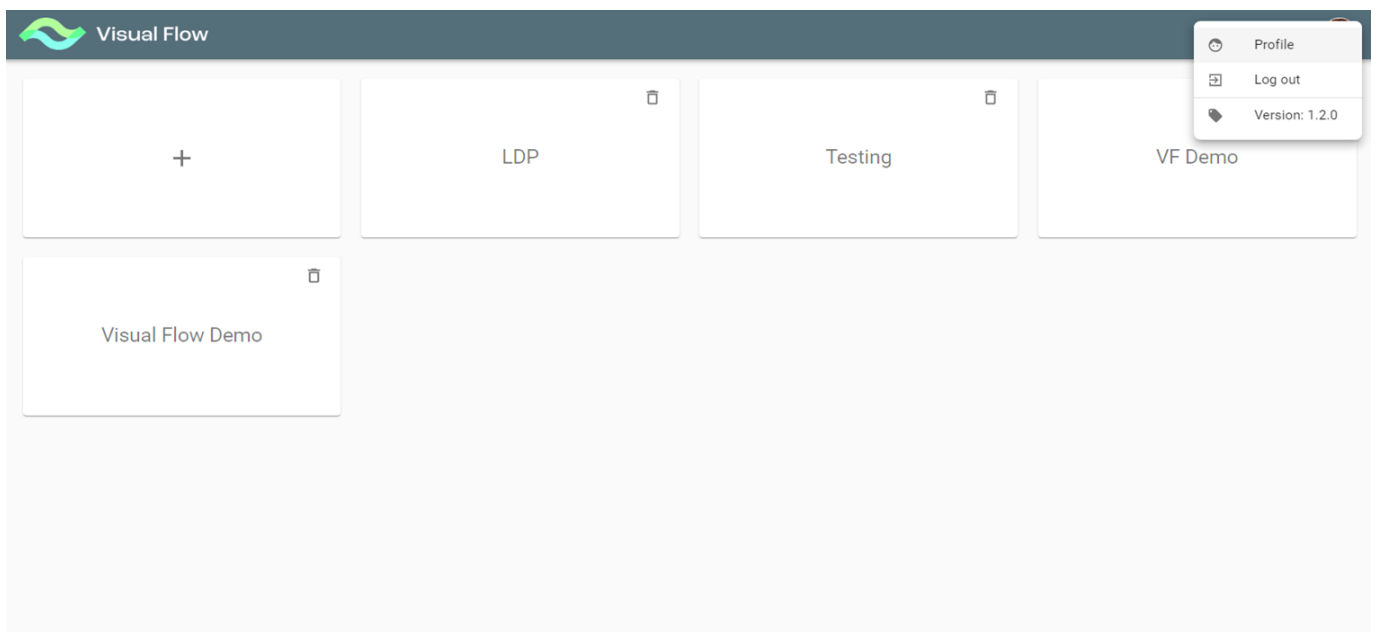
#### 3.1. Getting started

Once you first log on to the application, you see the initial screen with all existing projects:



If you are not authorized for a particular project, it is locked for you, so you see the lock icon on its tile. Please contact project owners to get access to their projects.

If you click on the user icon in the top right corner, you get to user profile menu:

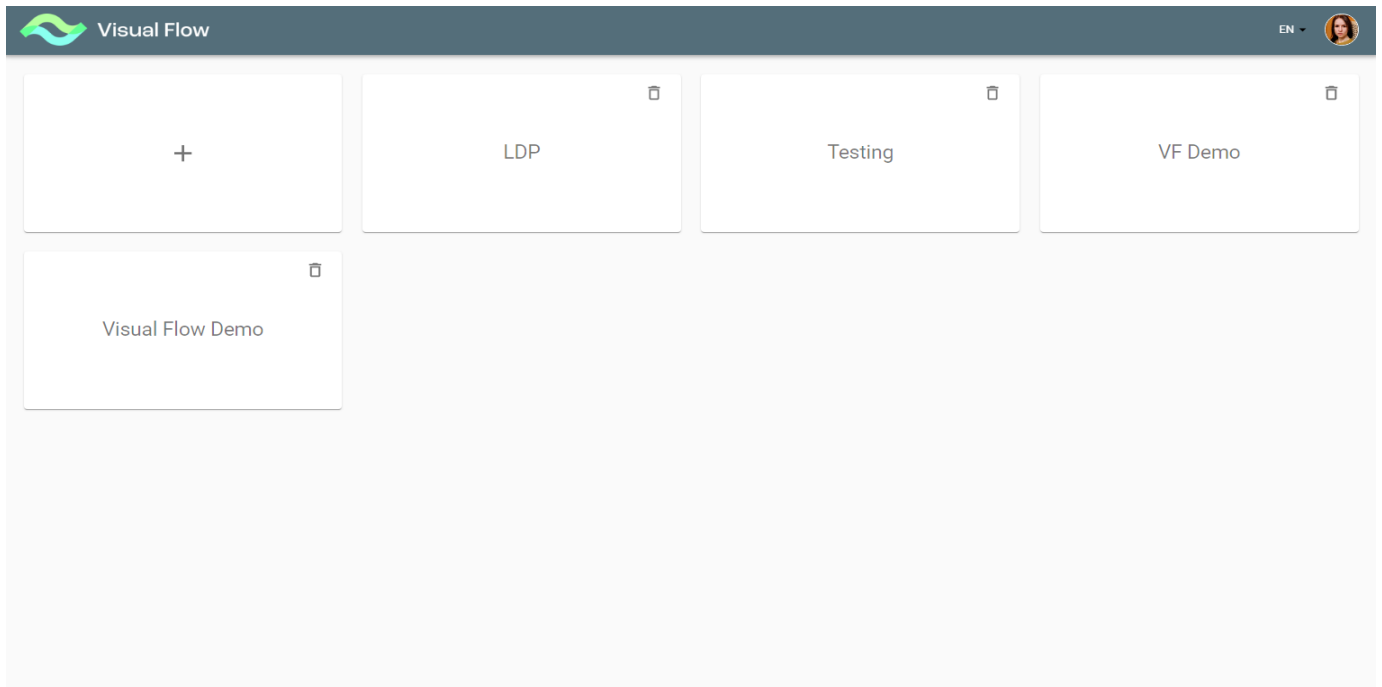


Here you can view your user profile or log out. Also it displays the application current version number.

### 3.2. Create a Project

To create a project, you need to push the “+” button.

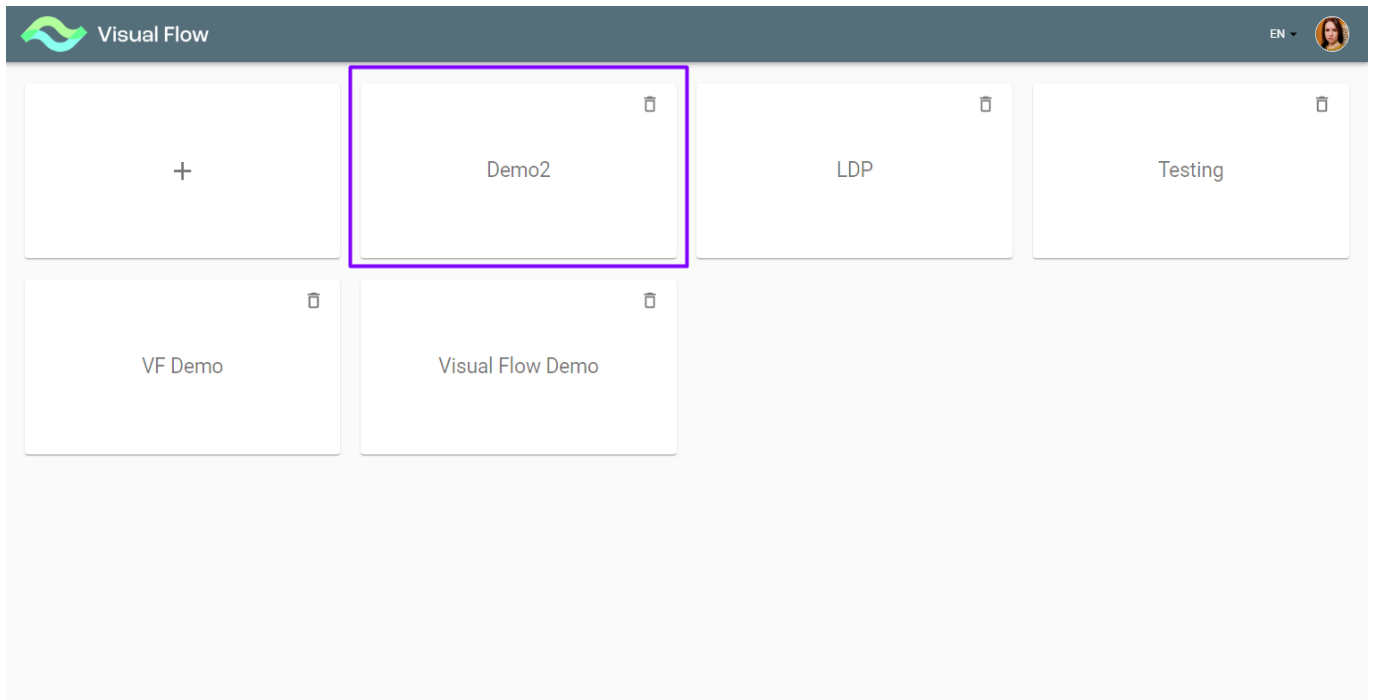
Note: this is the action of the Super-admin user only. The button is not visible for the application roles (Viewer, Operator, Editor, Admin).



With the “+” button pushed, you get to *Create Project Form* to enter basic project settings:

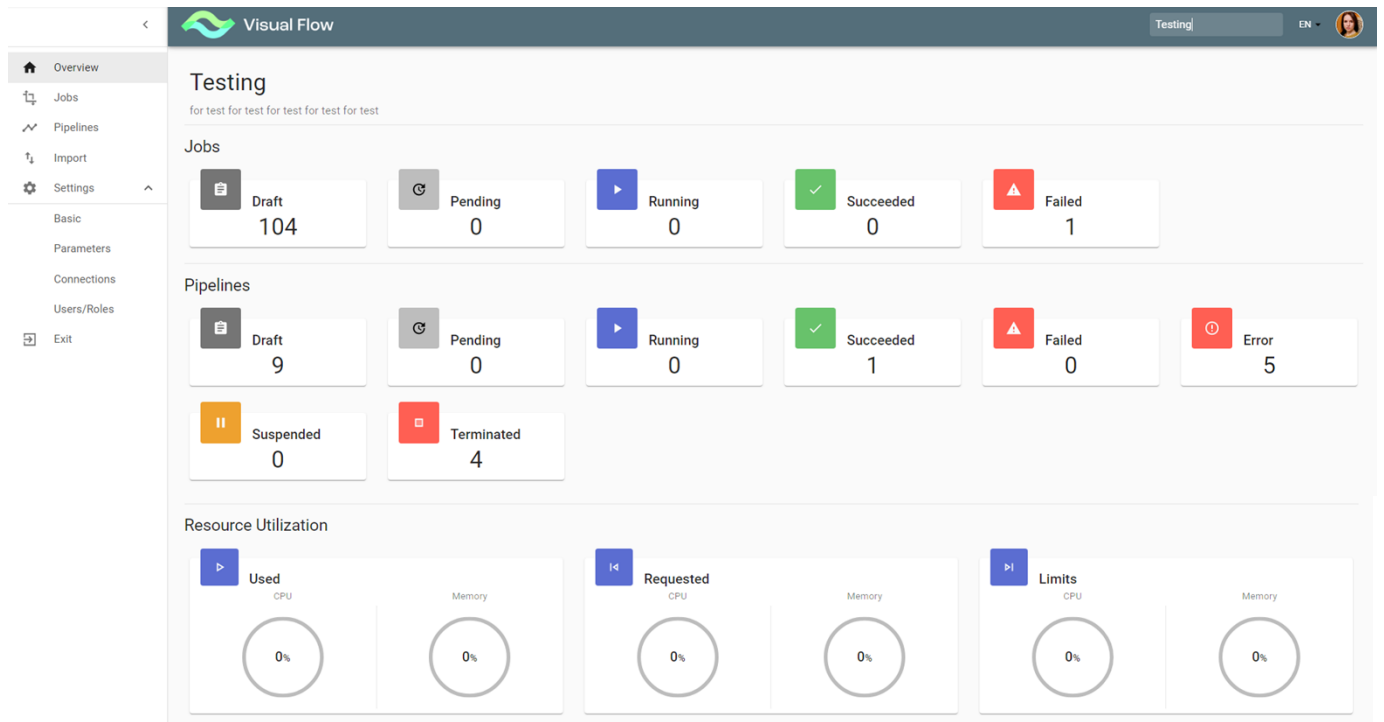
- Project Name
- Project Description
- Requests (CPU/Memory)
- Limits (CPU/Memory)

After saving *Create Project Form* the project is created under the given name and then can be found on the initial screen:



### 3.3. Project Overview

The screen contains the project left menu and displays information about the project jobs, pipelines and resource utilization (applicable for running jobs).



### 3.4. Manage Project Settings

The *Settings* submenu contains:

- Basic
- Parameters
- Connections
- Users/Roles

1) The *Basic* is already there after project creation. The *Edit* button turns on the edit mode for updates.

The screenshot shows the 'Visual Flow' application interface. On the left is a sidebar with navigation options: Overview, Jobs, Pipelines, Import, Settings (expanded), Basic (selected), Parameters, Connections, Users/Roles, and Exit. The main area displays the 'View Project' dialog for a project named 'Demo2'. The 'Basic' tab is active, showing fields for Name (Demo2), Description, Requests (CPU: 1 Cores, Memory: 1 GB), and Limits (CPU: 1 Cores, Memory: 1 GB). An edit icon is visible in the top right of the dialog.

2) The *Parameters* stores values required for the entire project, e.g., JDBC connection, DB2 credentials, or table schema can be the same for multiple jobs within a project and therefore stored at the project level. The *Create Parameter* button opens dialog on the right so you can introduce a new parameter.

The screenshot shows the 'Parameters' dialog. At the top is a search bar and a 'Type' dropdown. A 'CREATE PARAMETER' button is in the top right. Below is a table of parameters:

Name	Value	Actions
Access_key_aws	.....	[Eye icon] [Edit icon] [Delete icon]
Bucket_aws	.....	[Eye icon] [Edit icon] [Delete icon]
DB2_PWD	.....	[Eye icon] [Edit icon] [Delete icon]
DB2_URL	jdbc:db2://okd4w2.okd.gomel.iba.by:30100/EXAMPLE	[Edit icon] [Delete icon]
DB2_User	db2inst1	[Edit icon] [Delete icon]

- 3) The *Connections* option enables the user to manage connections to a storage. Here you see a list of all existing connections with their name/storage type and available actions (view, edit, delete, ping). Also, you can create a new connection with the *Create Connection* button.

### Manage Connections

Search... Storage ▼ CREATE CONNECTION ▼

Storage	Name				
Mongo	Mongo				
AWS S3	aws				
Cassandra	cassandra				
DB2	db2				
Oracle	oracle				

- 4) The *Users/Roles* is meant for user access management or to view user access depending on your authorization. Users cannot set roles to themselves. This operation can be performed by Admin or Super-admin only. So if you try to change your role, you will get the error message: “You cannot change your role”. The *Edit* button and therefore *Edit* mode is only available for an *Admin* within the project or for a *Super-admin*.

### Visual Flow

Visual Flow Demo EN

- Overview
- Jobs
- Pipelines
- Import
- Settings ^
  - Basic
  - Parameters
  - Connections
  - Users/Roles**
- Exit

#### Users and Roles


Search...

ID	Name	Role
<input type="checkbox"/> aapanasko-ibagroup-eu	Apanasko Alina	vf-operator
<input type="checkbox"/> agsadovsky	Alexander Sadovsky	vf-editor
<input type="checkbox"/> akutsenka-ibagroup-eu	Alina Kutsenka	vf-operator
<input type="checkbox"/> ashubenok	ashubenok-gomel-iba-by Shubenok	vf-operator

Rows per page: 5 1-4 of 4 < >

## 4. Job operations

### 4.1. Jobs Overview

Clicking the Jobs menu item leads to the Jobs overview screen, which allows you to see a list of jobs existing within a project. If a job is used in a pipeline, it is indicated by  (pipeline) icon. The Jobs overview screen displays the following information:

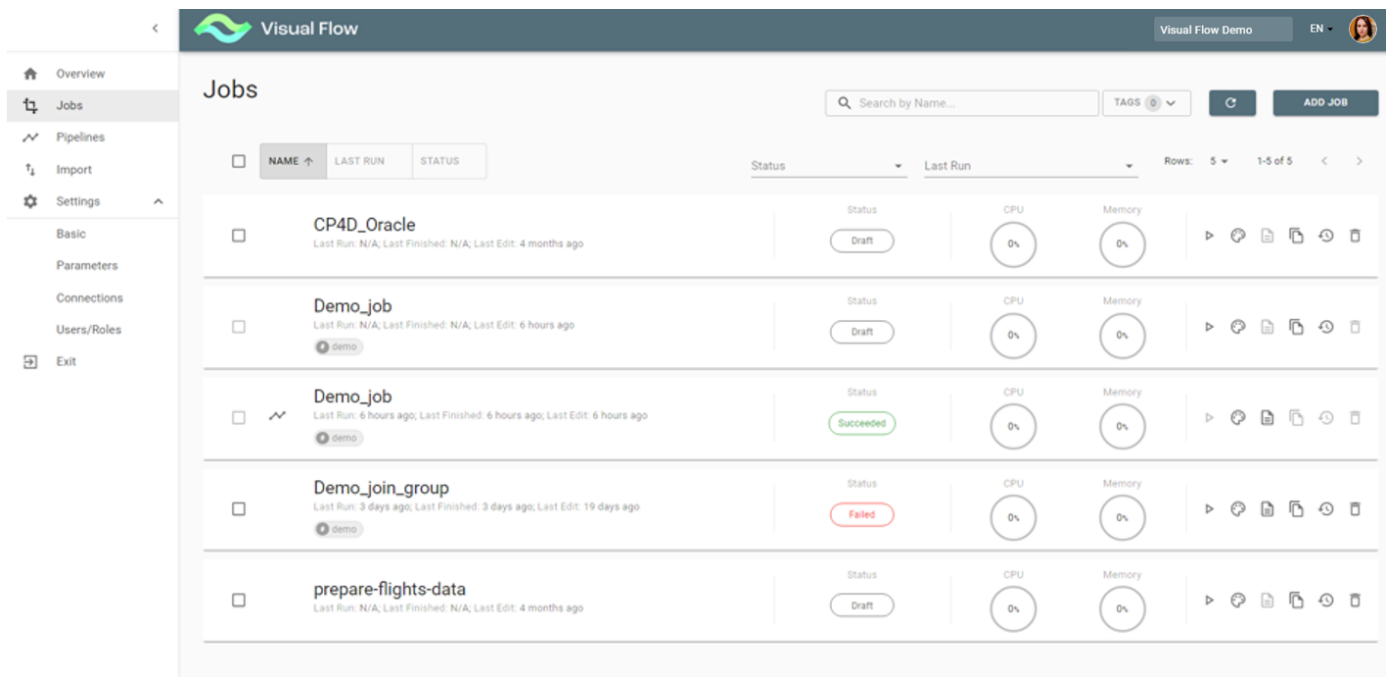
- Job Name
- Job Last run/Last finished/Last edit
- Job Status
- Resource Utilization (CPU/Memory)
- Available Actions (Run/Job Designer/Logs/Copy/Job History/ Delete)

A job has a certain status at various phases of execution:

- Draft
- Pending
- Running
- Succeeded
- Failed
- Unknown (This status appears very rarely in case of undefined error)

Notes:

- The actions availability and, therefore, visibility depends on user authorizations
- One cannot delete a job that compounds a pipeline



NAME	LAST RUN	STATUS	CPU	Memory	Actions
CP4D_Oracle	Last Run: N/A; Last Finished: N/A; Last Edit: 4 months ago	Draft	0%	0%	[Run] [Designer] [Logs] [Copy] [History] [Delete]
Demo_job	Last Run: N/A; Last Finished: N/A; Last Edit: 6 hours ago	Draft	0%	0%	[Run] [Designer] [Logs] [Copy] [History] [Delete]
Demo_job	Last Run: 6 hours ago; Last Finished: 6 hours ago; Last Edit: 6 hours ago	Succeeded	0%	0%	[Run] [Designer] [Logs] [Copy] [History] [Delete]
Demo_join_group	Last Run: 3 days ago; Last Finished: 3 days ago; Last Edit: 19 days ago	Failed	0%	0%	[Run] [Designer] [Logs] [Copy] [History] [Delete]
prepare-flights-data	Last Run: N/A; Last Finished: N/A; Last Edit: 4 months ago	Draft	0%	0%	[Run] [Designer] [Logs] [Copy] [History] [Delete]

## 4.2. Create a Job. Available Stages.

With the *Add Job* button pushed you get to *Job Designer* to create a new job.

← Please enter name and save params

PALETTE PARAMS Zoom: 20 50 100 150 Status: Draft

Name \*  
Job\_1

Tags  
Tag your job to categorize it

Resources

Driver Request Cores  
0.1

Driver Cores  
1

Driver Memory  
1 GB

Executor Request Cores  
0.1

Executor Cores  
1

Executor Memory  
1 GB

Executor Instances  
2

Shuffle Partitions  
10

CONFIRM DISCARD

You must provide a name for the job on the left configuration panel.

Tags can be used to classify your job.

Update parameters or keep their default values and then push the *Confirm* button:

← Your job has not been saved. If you leave Job Designer unsaved changes will be lost. Press "SAVE" to save your job

PALETTE PARAMS Zoom: 20 50 100 150 Status: Draft

Name \*  
Job\_1

Tags  
Tag your job to categorize it

Resources

Driver Request Cores  
0.2

Driver Cores  
1

Driver Memory  
1 GB

Executor Request Cores  
0.1

Executor Cores  
1

Executor Memory  
1 GB

Executor Instances  
2

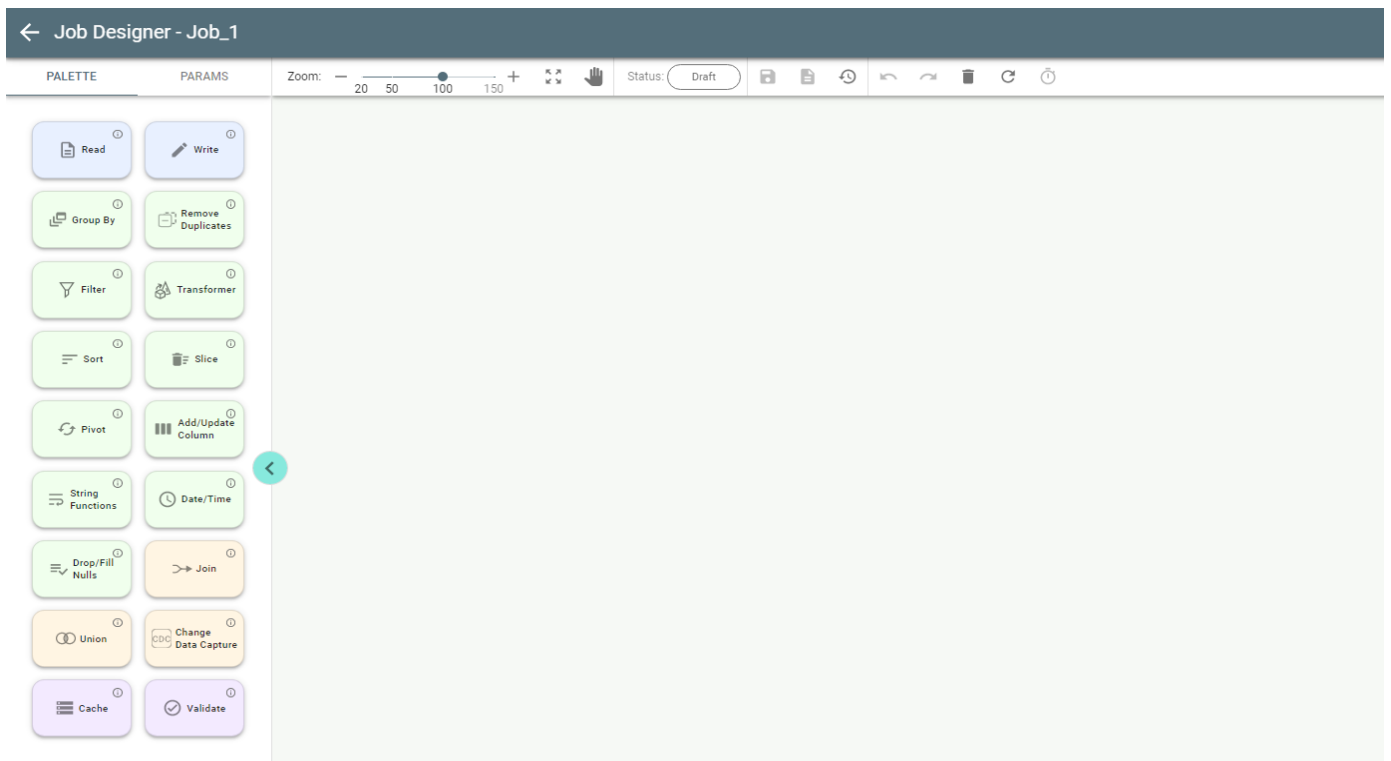
Shuffle Partitions  
10

CONFIRM DISCARD

Save the job by pushing the *Save* button on *Job Designer* header.

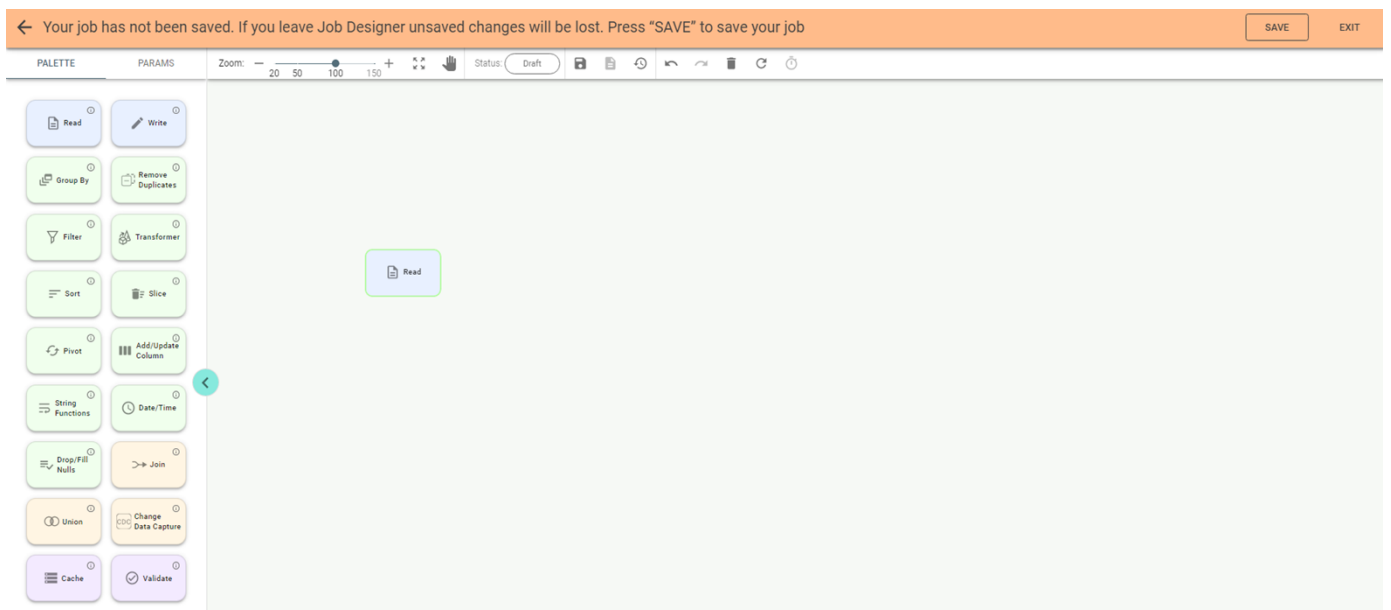
Now you see the *Palette* tab with all available stages:





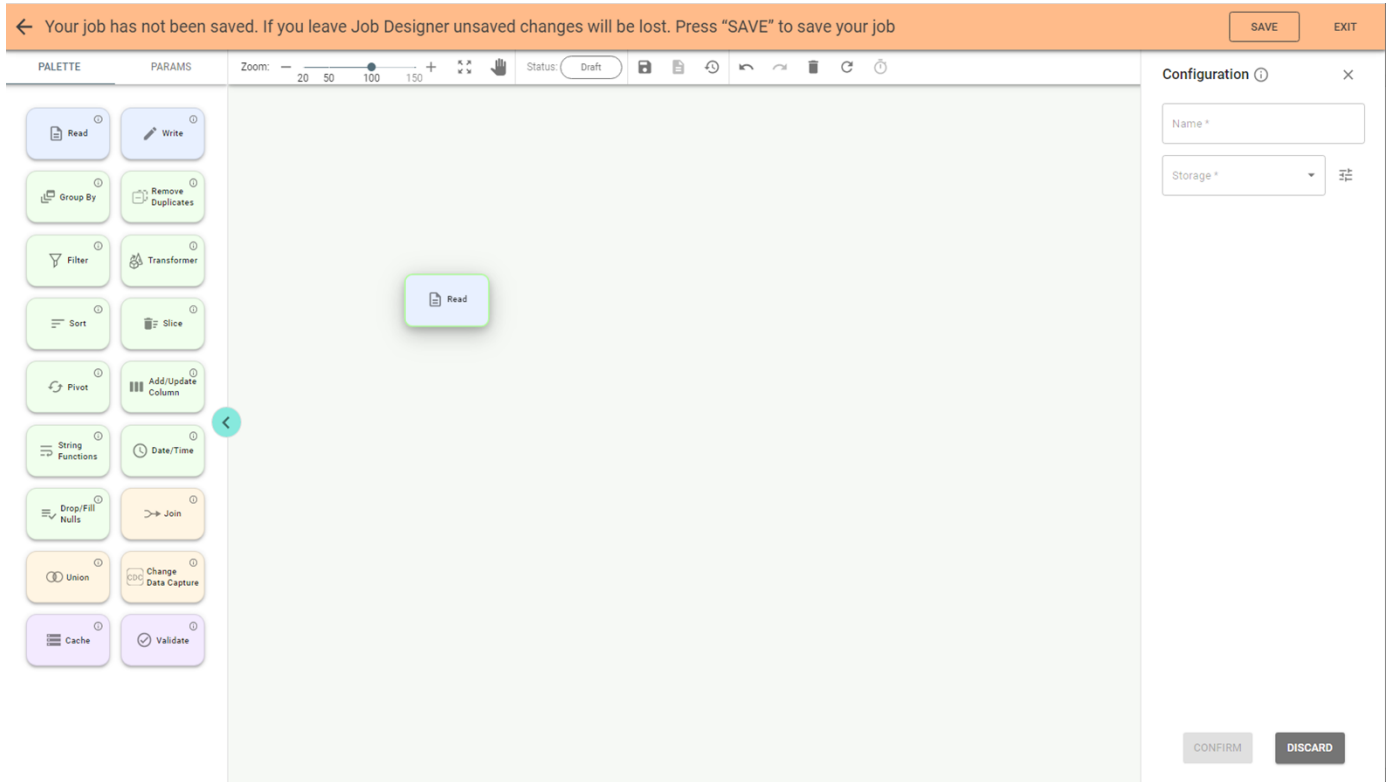
#### 4.2.1. Read Stage.

You can start creating a job by dragging a stage to the canvas, e.g., you can drag the *Read* stage:



Note: you can also add a stage by double clicking its tile on the palette.

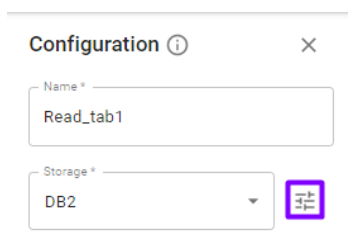
Double-click on a stage on canvas opens the configuration panel on the right:



Enter a name for the stage and select storage e.g. *DB2* if you want to read data from the DB2 table.  
Available *Storage* values for *Read* stage are:

- ✓ AWS S3
- ✓ Cassandra
- ✓ Click House
- ✓ Dataframe
- ✓ DB2
- ✓ Elasticsearch
- ✓ IBM COS
- ✓ Local file
- ✓ Mongo
- ✓ MySQL
- ✓ MSSQL
- ✓ Oracle
- ✓ PostgreSQL
- ✓ Redis
- ✓ Redshift
- ✓ Redshift-jdbc

Important: you can select an existing connection with the *Parameters* button near the *Storage* field:



If you do so, its parameters, e.g., JDBC URL, user, etc., are filled automatically.  
But now, suppose you don't have a connection created previously, so fill required parameters for *DB2* storage manually:

Configuration ⓘ

×

Name \*

Read\_tab1

Storage \*

DB2

⌵

⌵

JDBC URL \*

jdbc:db2://10.224.0.52

⌵

×

User \*

db2inst1

⌵

×

Password \*

.....

👁

⌵

×

Custom SQL

False

⌵

×

Schema \*

db2inst1

⌵

×

Table \*

user\_tab1

⌵

×


CertData

⌵

×

CONFIRM

DISCARD

Important: you can pick up a parameter value with the *Parameters*  button on the right panel if it is previously created as a project parameter.

Configuration ⓘ

×

Name \*

Read\_tab1

Storage \*


DB2

⌵

⌵

JDBC URL \*

#jdbc\_url#



×

The *Read* stage for DB2 storage has an option *Custom SQL* to read data with SQL statement (e.g., *select \* from table where field = value*). If you select *Custom SQL - True* you need to enter the SQL statement and specify the schema:

Custom SQL ✕

True ▼

SQL statement ✕

Select \* from  
db2inst1.user\_tab1 where  
DEPT = 'I' ≡

For the *Redis* source you need to define *Key column*, *Model*, *SSL*, *Read mode*, *Keys pattern* or *Table* fields in the Configuration of the *Read* stage.

- ✓ *Key column*. The Column name to store the hash key.
  - ✓ *Model* (*binary*, *hash*) defines the *Redis* model used to persist dataframe. By default, it is *hash*.
  - ✓ *Read mode* (*key*, *pattern*) defines how the read operation is handled. If *Key* is selected, then the read is done based on the *table* field. In the case of *Pattern* the provided pattern (option *Keys Pattern*) dictates what Redis key to read.
- Keys pattern*. If the pattern ends with \* (e.g., “table: \*”), all keys from it are read.  
If one pattern is defined (e.g., “table: first value”), then only one key is read.

Configuration ⓘ ✕

Name \*

ReadStage

Storage \*

Redis ≡

Host \*

okd4w1.okd.gomel.iba ≡ ✕

Port \*

31380 ≡ ✕

Password \*

..... 👁 ≡ ✕

SSL

False ▼ ✕

Key column ≡ ✕

Model \*

hash ▼ ✕

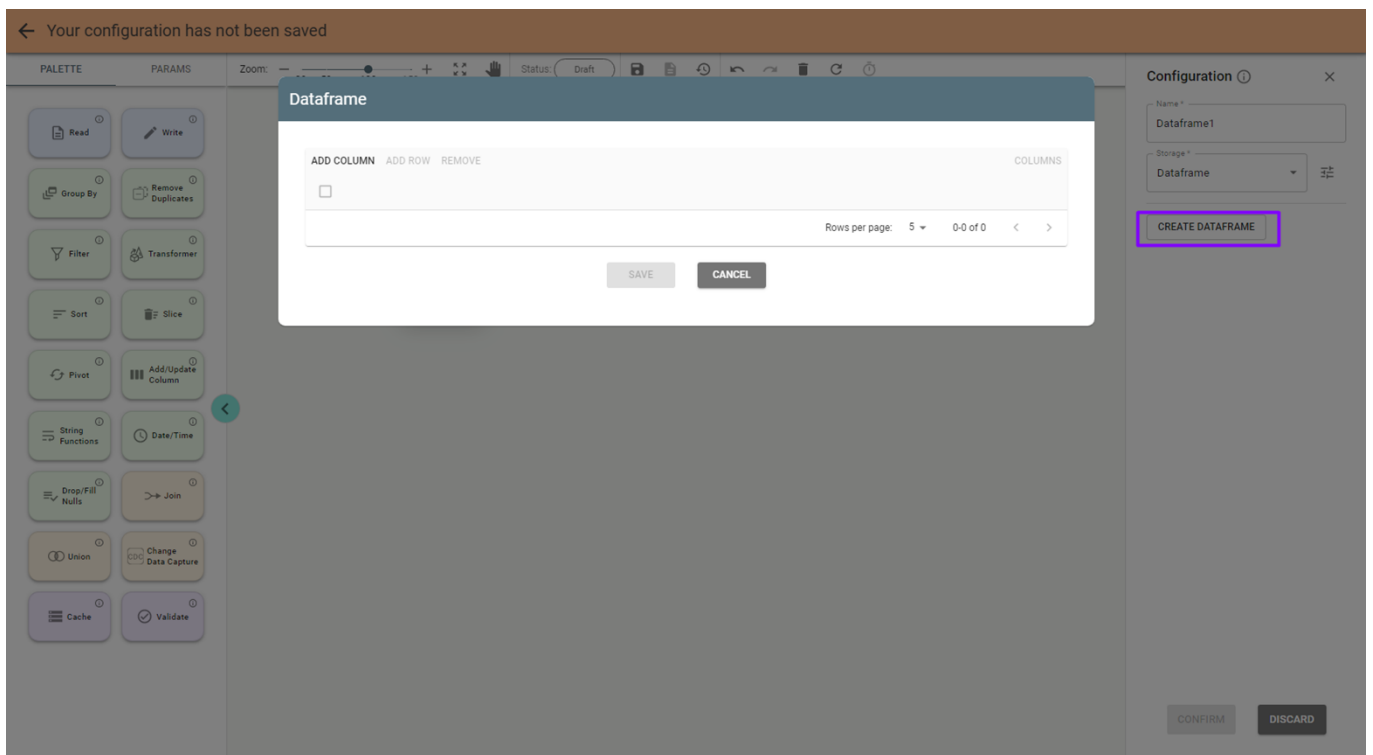
Read mode \*

Pattern ▼ ✕

Keys pattern \*

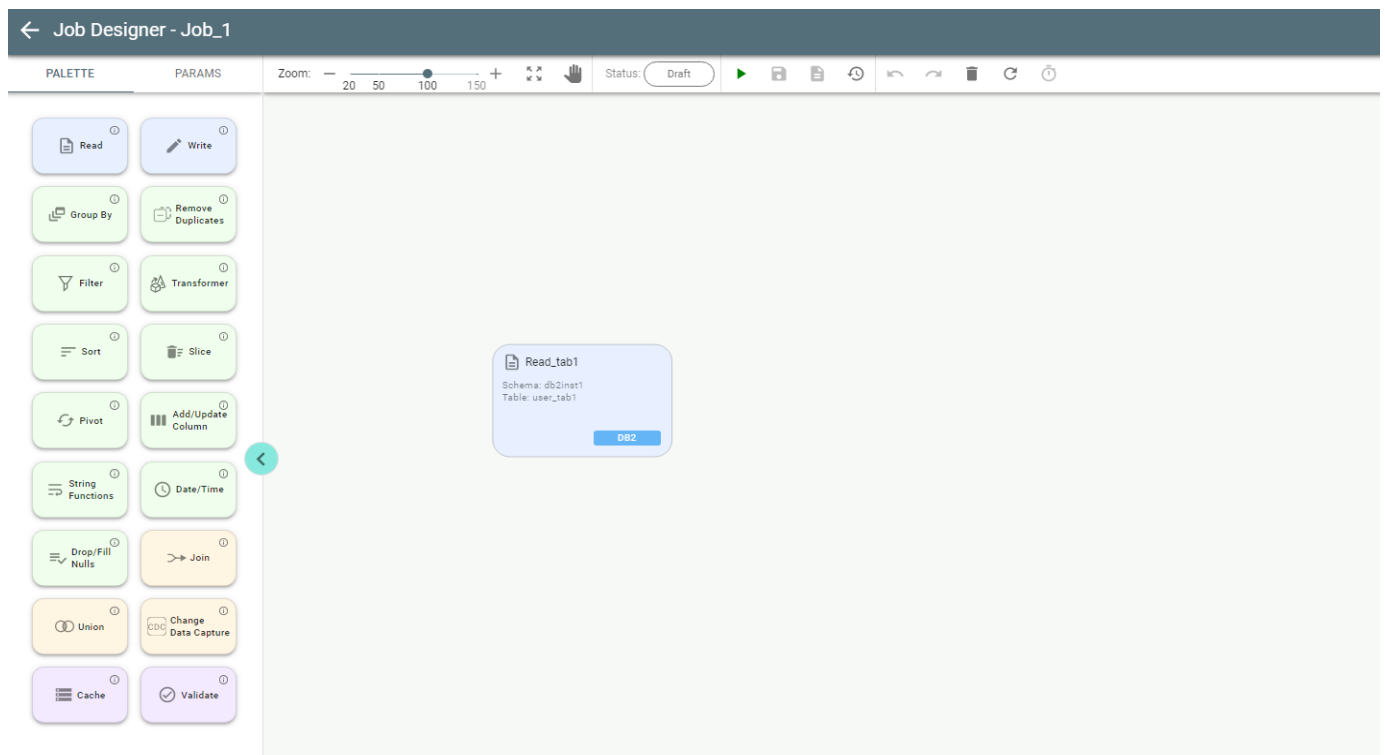
table\_test:\* ≡ ✕

Note: with *Dataframe* storage option you can create your own dataset:



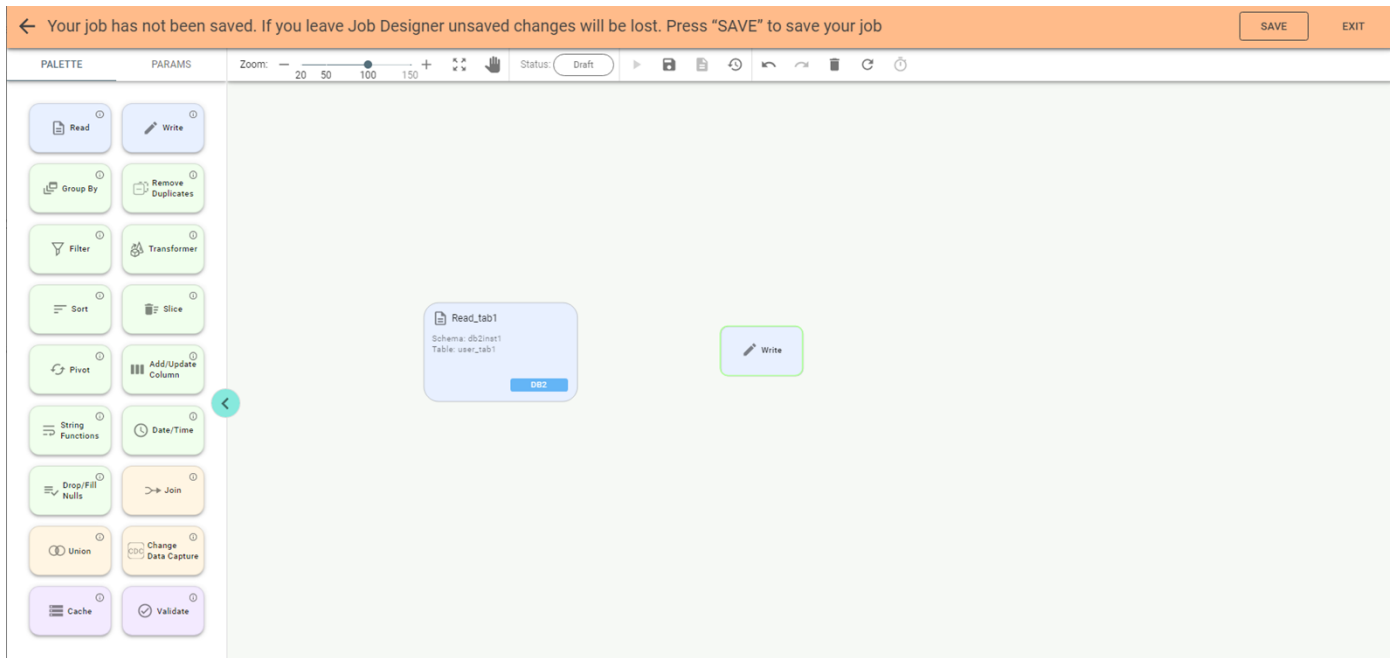
Save the stage by pushing the *Confirm* button on the configuration panel. Push the *Save* button above if you want to save the job at this step.

When the first stage of the job is configured, the canvas looks like this:



### 4.2.2. Write Stage.

Now drag another stage, e.g., Write stage:



Enter a name for the stage and select storage *IBM COS* if you want to post data from the DB2 table to the Cloud Object Storage file. Fill required parameters for the *IBM COS* storage.

Available storage values for the *Write* stage are:

- ✓ AWS S3
- ✓ Cassandra
- ✓ Click House
- ✓ DB2
- ✓ Elasticsearch
- ✓ IBM COS
- ✓ Local file
- ✓ Mongo
- ✓ MSSQL
- ✓ MySQL
- ✓ Oracle
- ✓ PostgreSQL
- ✓ Redis
- ✓ Redshift
- ✓ Redshift-jdbc
- ✓ STDOUT

*IBM COS* storage has two options of *Authentication type*: *HMAC* and *IAM*.

If *HMAC* is selected, you should fill *accessKey* and *secretKey*.

If *IAM* is selected, *iamApiKey* and *iamServiceId* should be entered.

For the storages *IBM COS* and *AWS S3* the function *Partition By* can be used in the *Write* stage. It partitions the output on the file system by given columns. If specified, the output is laid out on the file system similar to Hive's partitioning scheme.

As an example, when we partition a dataset by year and then month, the directory layout looks like this:

- year=2016/month=01/
- year=2016/month=02/

In the case of importing table data with *Write* stage to *Cassandra* source from another storage, the table layout for output must be previously created in Cassandra. Columns, key fields, and data types of the fields must be specified in the table.

Important: All the above points must match the imported table.

If the column names have uppercase characters in the imported table when data is output to *Cassandra*, the job will fail as column names are stored there in lowercase only. You can resolve this issue with the *Transformer* stage. The output recorded to *STDOUT* storage can be seen in Logs. The number of records shown in the logs can be specified in the *Quantity* field. The available range is from 1 to 2147483631 records.

For *Redis* source in *Write* stage, the following fields must be specified: *Key column*, *Model*, *SSL*, *TTL*, *Table* and *Write mode*.

- ✓ *Key column*. For writing. It specifies the unique column used as the Redis key. By default, the key is auto-generated.

The screenshot shows a 'Configuration' dialog box with the following fields and values:

- Name: Write2
- Storage: Redis
- Host: okd4w1.okd.gomel.iba
- Port: 31380
- Password: (masked with dots)
- SSL: (dropdown menu)
- Key column: NAME (highlighted with a red box)
- Model: hash
- Table: table\_test
- TTL: 0
- Write mode: Overwrite

At the bottom of the dialog are two buttons: 'CONFIRM' and 'DISCARD'.

- ✓ *TTL*. Data expiration time in seconds. Data doesn't expire if TTL is negative or 0. By default, it is 0. A positive value of *TTL* means the number of seconds in which the data will be removed.

Important:

The *Write mode* field defines how data is posted to its destination. Available values are:

- ✓ Overwrite
- ✓ Append
- ✓ Error if Exists

With Overwrite Write mode Truncate mode can be used for DB2, Oracle, MySQL, PostgreSQL, MSSQL and Redshift:

- ✓ *None*. No truncation occurs, but the target table is deleted and recreated. Note that all the indexes, constraints and other modifiers assigned for this table will be lost.
- ✓ *Simple*. The standard truncation that deletes data from the target table but keeps the indexes, constraints and other modifiers intact. However, if the target table has a primary key referenced as a foreignkey in other tables, the truncation will fail. To resolve this, either use Cascade mode or manually drop constraints (outside of VF) prior to accessing the table with VF.
- ✓ *Cascade* (only for *Oracle* and *PostgreSQL*). The cascade truncation not only deletes the data from the target table but also from other tables that use the target table's primary key as a foreign key constraint.

*File format* is to choose a format of the destination file. Available formats are:

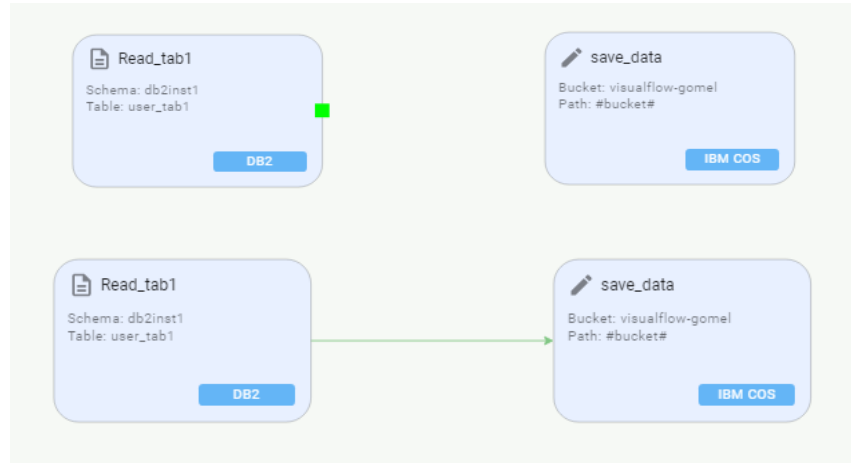
- ✓ CSV
- ✓ JSON
- ✓ Parquet
- ✓ ORC
- ✓ Text
- ✓ Avro

Confirm the stage by pushing *Confirm* on the panel. Now there are two stages to connect.



Important: to connect stages, hover a mouse on a stage edge until you see a green rectangle. Click and drag it to the border of another stage and its green rectangle. When you reach it, a green arrow should appear.





Other stages available are:

- ✓ Group By
- ✓ Remove Duplicates
- ✓ Filter
- ✓ Transformer
- ✓ Sort
- ✓ Slice
- ✓ Pivot
- ✓ Add/Update Column
- ✓ String Functions
- ✓ Date/Time
- ✓ Drop/Fill Nulls
- ✓ Join
- ✓ Union
- ✓ Change Data Capture
- ✓ Cache

#### 4.2.3. Group By Stage.

The stage allows grouping by columns, which must be specified in the Configuration panel. There is an option *Drop grouping columns* for removing them from the output. Also you can use the aggregate function, e.g., Count, Avg, etc.

Configuration ⓘ
✕

Name \*

Group\_by\_dept

☐ Drop grouping columns

Group By \*

DEPT ✕

Aggregate functions \*
+

Count ▾

Column

NAME

—

#### 4.2.4. Remove Duplicates Stage.

Specify a key column for the operation. To specify more than one key, use a comma or Enter. For *Order By* operation, you need to select columns to sort by and sort order. The default is ascending.

The screenshot shows a configuration window titled "Configuration" with a close button (X) in the top right corner. It contains three main sections: 1. "Name \*" with a text input field containing "Remove duplicates". 2. "Key \*" with a text input field containing "name" and a small circular button with an "X" to the right. 3. "Order By \*" with a dropdown menu showing "asc" and a text input field containing "name", with a small circular button with a "+" sign to the right. There is also a small "Column" label above the "name" input field.

#### 4.2.5. Filter Stage.

Enter any boolean expression. You can combine two or more ones by using logical operators (AND,OR). Examples: (column1 < 10) and (column2 between 10 and 25).

The screenshot shows a configuration window titled "Configuration" with a close button (X) in the top right corner. It contains two main sections: 1. "Name \*" with a text input field containing "Filter\_DEPT\_I". 2. "Filter \*" with a large text area containing the expression "DEPT='I'".

#### 4.2.6. Transformer Stage.

The *Transformer* stage allows you to modify columns to fill them with data further. *Transformer* mode defines the type of SQL query (Spark SQL dialect) which is taken to execute.

*Simple* mode only allows you to specify the part between SELECT and FROM. You can do things like these:

```
col1, concat(col1, col2)
count(*) as count
a, b, row_number() OVER (PARTITION BY a ORDER BY b)
col, exists(col, x -> x % 2 == 0)
col, collect_list(col)
```

The syntax is: <column\_name\_1> as <alias\_1>, function(<column\_name\_2>) as <alias\_2>.

*Full SQL* mode allows you to write a full-blown Spark SQL query. In this case, you have to specify a table name manually or reference a table name from a parameter.

*Table name*. The name of the table which should be used within the Spark SQL query. Applicable for *Full SQL* transformer mode only.

#### 4.2.7. Sort Stage.

There are two types of sorting available: *Full sort* and *Sort within partitions*.

*Full sort* classifies dataframe by the specified column(s).

*Sort within partitions* sorts each dataframe partition by the specified column(s). In this case, the order of the output data is not guaranteed because the data is ordered at the partition level.

Select column(s) to sort by and the sort order (default value is Asc).

Available sort options:

- asc
- asc nulls first
- asc nulls last
- desc
- desc nulls first
- desc nulls last

#### 4.2.8. Slice Stage.

The *Slice* stage allows you to remove unnecessary columns from your data stream. There are 2 modes of *Slice* stage:

- *Keep*
- *Drop*

The default mode is Drop. In this case, you specify columns you would like to slice from your dataflow.

With Keep mode selected, you specify the columns you want to keep.

#### 4.2.9. Pivot Stage.

The *Pivot* stage has two operation types:

- *Pivot*
- *Unpivot*

*Pivot* function rotates data from one column into multiple columns (transpose a row to a column).

With aggregation one of the grouping column values is transposed into individual columns with distinct data.

Product	Amount	Country
Banana	1000	USA
Carrots	1500	USA
Beans	1600	USA
Orange	2000	USA
Orange	2000	USA
Banana	400	China
Carrots	1200	China
Beans	1500	China
Orange	4000	China

Banana	2000	Canada
Carrots	2000	Canada
Beans	2000	Mexico

From the above dataframe, to get the total amount exported to each country of each product we group by Product, pivot by Country and sum the Amount. This transposes the countries from the dataframe rows into columns and produces the below output. Missing data is represented as Null.

Product	Canada	China	Mexico	USA
Orange	Null	4000	Null	4000
Beans	Null	1500	2000	1600
Banana	2000	400	Null	1000
Carrots	2000	1200	Null	1500

Unpivot is a reverse operation used to transform it back by rotating column values into rows values. For *Pivot* operation you need to specify:

- *Group By.* Columns for grouping
- *Pivot columns*
- *Aggregate function and column*
- *Pivot values.* Values from pivot column to be used (optional)

For *Unpivot* operation you need to specify:

- *Unchanged columns*
- *Unpivot columns.* Columns for unpivoting
- *Unpivot names.* Column names for unpivoting

#### 4.2.10. Add/Update Column Stage.

The *Add/Update Column* stage is used to add a new column to a dataframe, change value of an existing column, convert the data type of a column or derive a new column from an existing column. Also it gives the ability to use conditions or window functions to provide column values.

It has the following operations types:

- *deriveColumn*
- *addConstant*
- *changeType*
- *renameColumn*
- *useConditions*
- *useWindowFunctions*

If you select *useWindowFunctions* you need to pick a function from the dropdown list. Each one has its own parameters to enter.

The available window functions are:

- *rank*
- *dense\_rank*
- *percent\_rank*
- *cume\_dist*
- *row\_number*
- *ntile*

- *lag*
- *lead*
- *count*
- *sum*
- *avg*
- *max*
- *min*

#### 4.2.11. String Functions Stage.

The *String Functions* stage is handy when we need to make string operations on a dataframe column. The *Operation type* dropdown list contains the following Spark built-in standard string functions:

- *ascii*
- *base64*
- *concat\_ws*
- *decode*
- *encode*
- *format\_number*
- *format\_string*
- *title\_case*
- *instr*
- *length*
- *lower*
- *locate*
- *lpad*
- *ltrim*
- *regexp\_extract*
- *ubase64*
- *rpadd*
- *repeat*
- *rtrim*
- *split*
- *substring*
- *substring\_index*
- *trim*
- *upper*

#### 4.2.12. Date/Time Stage.

Date/Time stage leverages Spark standard built-in date and timestamp functions which come in handy when we need to make operations on date and time. All these operations accept input of type: date, timestamp or string. If string, it should be in a format that can be cast to date, such as `yyyy-MM-dd` and timestamp in `yyyy-MM-dd HH:mm:ss.SSSS`. It returns date and timestamp respectively. Null is returned if the input data was a string that could not be cast to date or timestamp.

#### 4.2.13. Drop/Fill Nulls Stage.

Drop/Fill Null stage allows gracious null handling. There are 2 modes:

- *Drop*
- *Fill*

With *Drop* mode you can:

- 1) Remove all columns where all the rows have null values. For that you need to set *Drop Type* to *Column* and *Drop Choice* to *All*.
- 2) Remove specific columns where all the rows have null values. For that you need to set *Drop Type* to *Column*, *Drop Choice* to *Names* and specify column names you want to drop.
- 3) Remove all rows where all the values are null. For that you need to set *Drop Type* – *Row* and *Drop Choice* – *All*.
- 4) Remove all rows, where all the values are null in specific columns. (Works as a filter). For that you need to set *Drop Type* to *Row*, *Drop Choice* to *Names* and specify drop column names.

*Fill* mode is used to replace NULL values on a dataframe column with any constant value or using aggregate function. ( *Fill Value Type* - *Custom* or *Agg* respectively ).

*Fill Value Type* - *Custom* allows you to replace all columns with one value at once or specify a specific value per column you want to fill with. For that you need to select *Fill Choice* - *All* or *Names* respectively.

*Fill Value Type* - *Agg* allows you to fill a specific column with a *Strategy*, which stands for the aggregation types: "mean", "median" or "mode".

Configuration ⓘ ×

Name \*  
Fill\_Null

Mode \*  
Fill ×

Fill Value Type \*  
Agg ×

Fill Columns \*  
col1 × col2 ×

Fill Strategy \*  
mean ×

#### 4.2.14. Join Stage.

Available types of join are:

- *Inner* join. Transfers records from input data sets whose key columns contain equal values to the output data set. Records whose key columns do not contain equal values are dropped.
- *Left outer* join. Transfers all values from the left data set but transfers them from the right one only when key columns match. The stage drops the key column from the right data set.
- *Right outer* join. Transfers all values from the right and left data sets. Intermediate them only when key columns match. The stage drops the key column from the left and intermediate data sets.
- *Full outer* join. Transfers records in which the contents of the key columns are equal from the left and right input data sets to the output. It also transfers records whose key columns contain unequal values from input and output data sets.
- *Cross* join. Returns a result data set where each row from the first table is combined with each from the second table.
- *Left semi* join. Returns values from the left relation that has a match with the right.

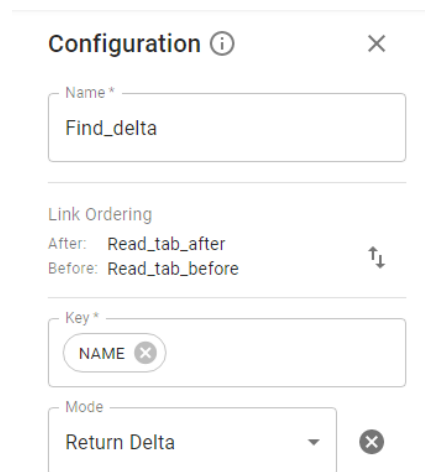
- *Left anti* join. Returns values from the left relation that has NO match with the right.

*Link Ordering* option allows you to specify which input link is regarded as the left and which as the right. By default, the first link added is left, and the last one is right.

#### 4.2.15. Change Data Capture Stage.

This stage is intended to find all differences between before (old) and after (new) datasets. Based on them, CDC produces an additional column — 'Operation', which indicates the state of the row from the old dataset considering its presence/absence in the new one. CDC compares each row of the new and the old datasets based on keys and columns to compare values and sets Operation value.

Note: old and new datasets must not contain duplicates (rows with the same key) based on key column(s). Old and new datasets columns to compare, as well as key columns, must be present in both datasets with the same name. If there are duplicated rows in at least one dataset, the result of the CDC gets unpredictable.



The screenshot shows a 'Configuration' dialog box with the following fields and options:

- Name \***: A text input field containing 'Find\_delta'.
- Link Ordering**: A section with two labels: 'After: Read\_tab\_after' and 'Before: Read\_tab\_before'. To the right of these labels is a vertical double-headed arrow icon.
- Key \***: A text input field containing 'NAME' with a small 'x' icon to its right.
- Mode**: A dropdown menu currently set to 'Return Delta' with a small 'x' icon to its right.

#### 4.2.16. Union Stage.

You can union two datasets.

Note: Columns sequence, names, and types are important for union operation.

*Mode* contains 2 options: *All values* and *Distinct values*.

- ✓ *Distinct values*, which is the default, eliminates duplicate records from the second dataset.
- ✓ *All values* needs to be specified explicitly, and it tolerates duplicates from the second dataset.

Configuration ⓘ

Name \*

tab1\_tab2\_union

Mode \*

All values

Distinct values

#### 4.2.17. Cache Stage.

The *Cache* stage persists dataset in some storage. You can tweak the storage type by specifying parameters. The configuration gives you the ability to define:

- ✓ Whether to use memory.
- ✓ Whether to drop the RDD to disk if it falls out of memory.
- ✓ Whether to keep the data in memory in a serialized format.
- ✓ Whether to replicate the RDD partitions on multiple nodes.

Configuration ⓘ

Name \*

dbs

Use disk

True

Use memory

True

Use off heap

False

Deserialized

True

Replication

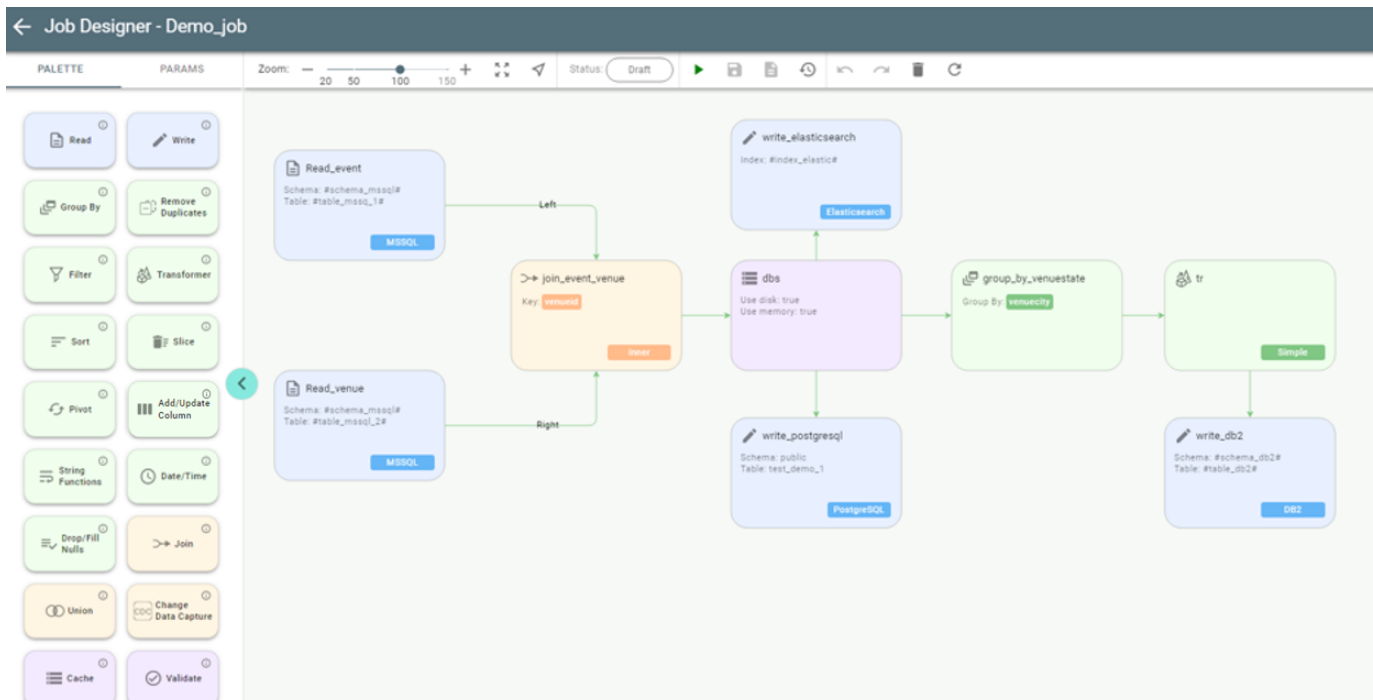
1

Save the job by pushing *Save* on *Job Designer* header.

For a newly created job, as long as it is not yet run, its status is *Draft*:  
 Drag other stages according to the data flow from source to destination.  
 See the job with more stages as an example:

Status: Draft





### 4.3. Job Designer functions overview

The following functions are available in *Job Designer*:

- ✓ Zoom operations:
- ✓ Switch mode between Move and Select
- ✓ Show job status
- ✓ Run job / Stop job (for running)
- ✓ Save job
- ✓ See job logs
- ✓ See job history
- ✓ Undo / Redo operation on canvas
- ✓ Remove element from canvas
- ✓ Refresh

Note: you can copy stages on canvas using the mouse right-click menu options:

- ✓ copy stage
- ✓ paste stage

### 4.4. Job Execution

Push the *Play* button to run the job:

Its status changes from *Draft* to *Pending*

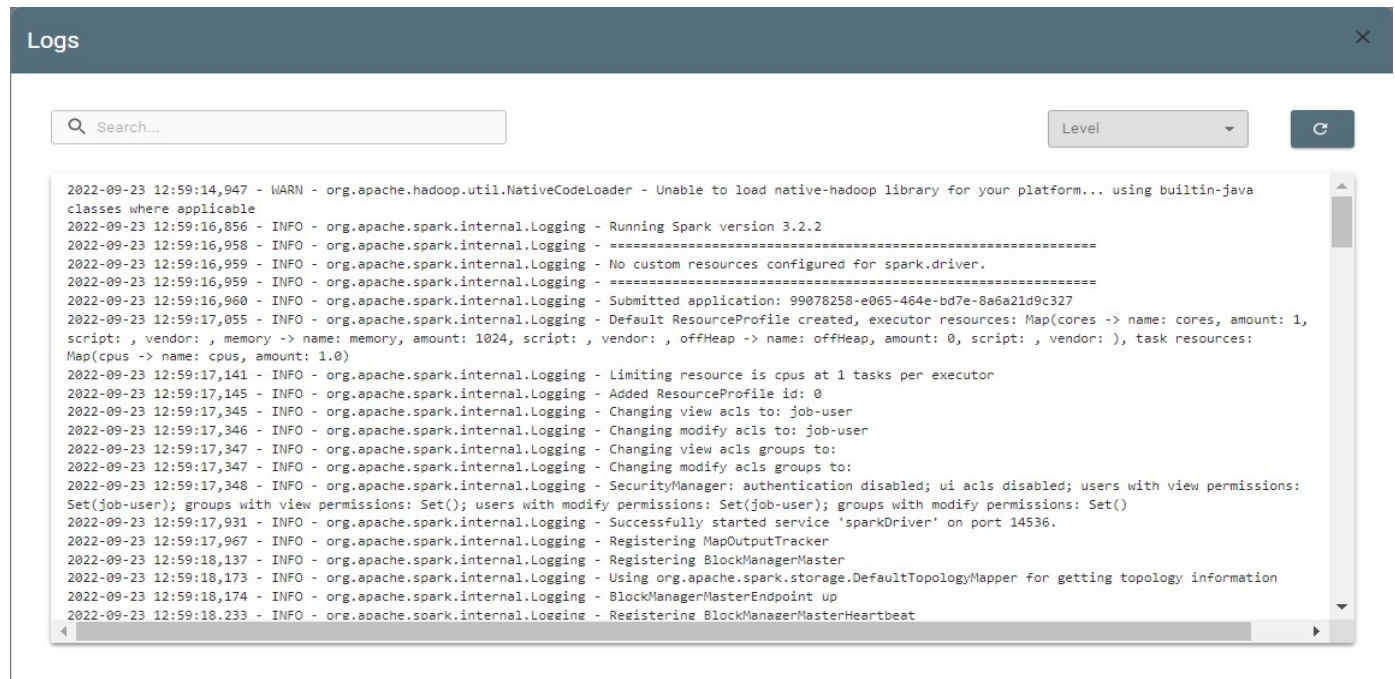
Status: Pending

Push Refresh to update the status. It should turn to *Running*

Status: Running

While running, it can be interrupted with the *Stop* button. When a job is completed, its status is *Succeeded* or *Failed*.

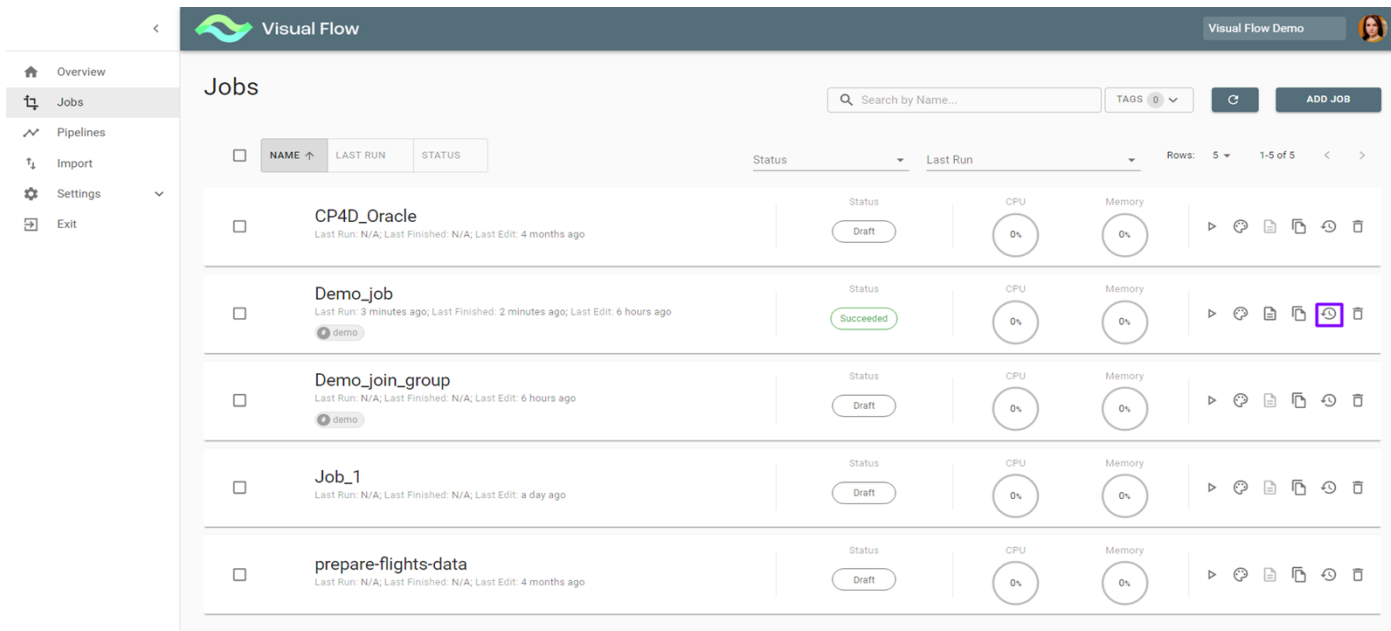
Use the *Logs* button  to analyze job logs. It gets you to *Logs* screen:



Logs can be filtered by level. Such as:

- ✓ INFO
- ✓ WARNING
- ✓ ERROR
- ✓ DEBUG
- ✓ RESULT

You can also view earlier job runs data with the *Job History* button:



It takes you to *Job History* screen, containing each job run data, including logs:

✓

Demo\_job

Last Run by: alemeshevskaya-ibagroup-eu

<

## 5. Pipeline Operations

### 5.1. Pipelines Overview

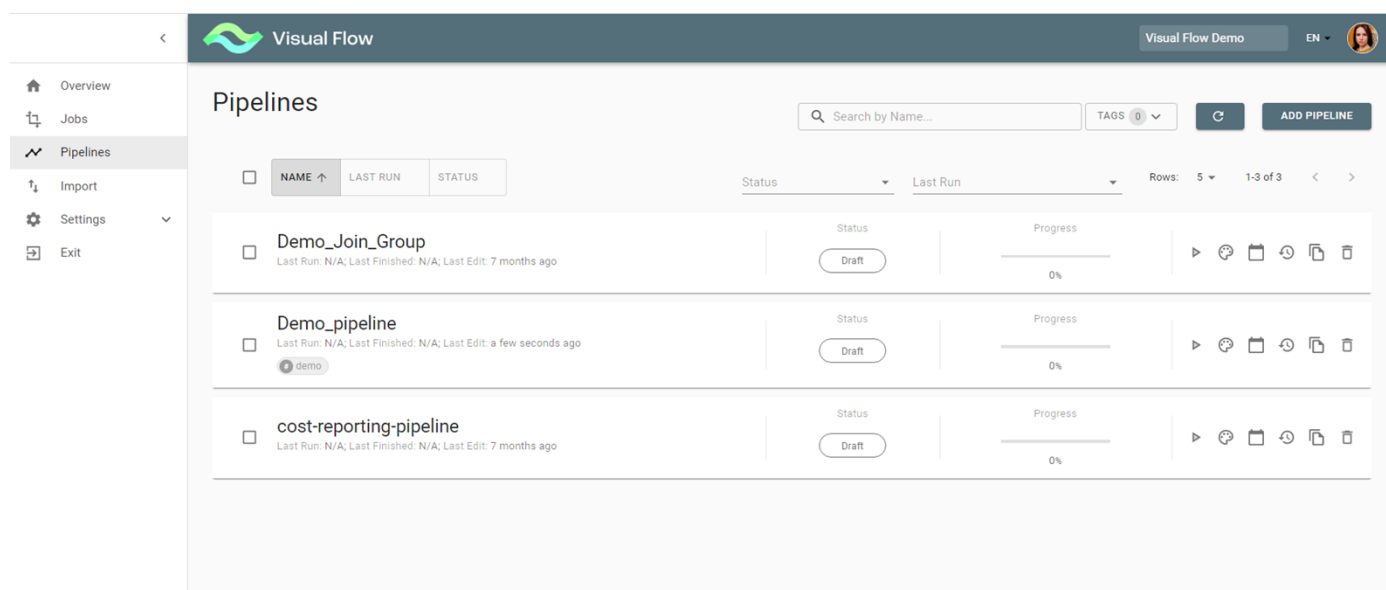
Clicking the *Pipelines* menu item takes you to the Pipelines overview screen, which shows a list of pipelines existing within a project.

It displays the following information:

- Pipeline Name
- Checkbox for deleting/exporting multiple pipelines
- Pipeline Last run/Last finished/Last edit
- Pipeline Status
- Pipeline Progress
- Available Actions (Run/Pipeline Designer/ Scheduling /History/Copy/Delete)

Pipeline has a certain status at various phases of execution:

- Draft
- Error (This status may appear due to incorrectly entered data)
- Failed
- Pending
- Running
- Succeeded
- Suspended
- Terminated



Note: the actions availability and therefore visibility depends on user authorizations.

## 5.2. Create a Pipeline

With the *Add Pipeline* button pushed, you get to *Pipeline Designer* for creating a pipeline. On the left configuration panel the *Params* tab is open by default, where you can enter a pipeline name and tags for the pipeline classification:

Please enter name and save params

PALETTE

PARAMS

Zoom: 20 50 100 150 + -

Status: Draft

Progress: 0%

Name \*

Name

Tags

Tag your job to categorize it

CONFIRM

DISCARD

Once you add a name, notifications become available to you:

Please enter name and save params

PALETTE

PARAMS

Zoom: 20 50 100 150 + -

Status: Draft

Progress: 0%

Name \*

Pipe1

Tags

Tag your job to categorize it

Notifications

Notify about failure

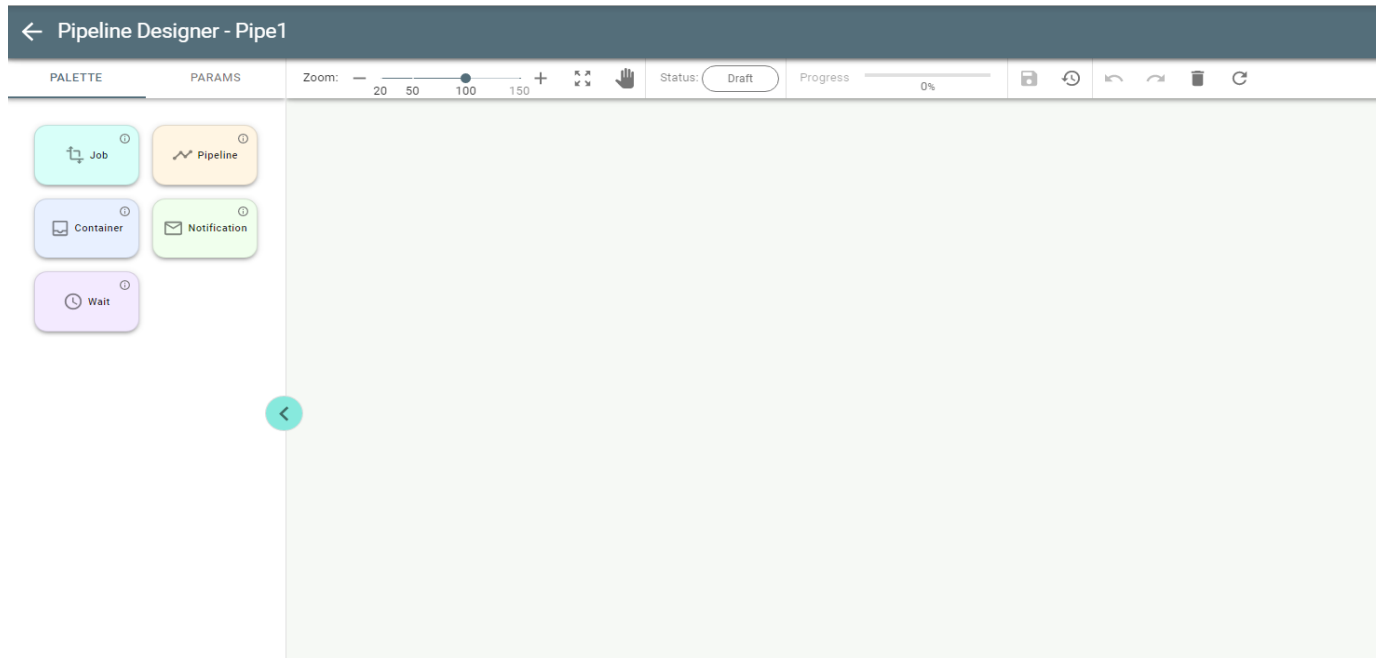
Notify about success

CONFIRM

DISCARD

Set notifications to be notified on the pipeline events as you wish and push the *Confirm* button. Save the pipeline by pressing the *Save* button on *Pipeline Designer* header.

Once a pipeline is saved the *Palette* tab with all available stages is opened by default:

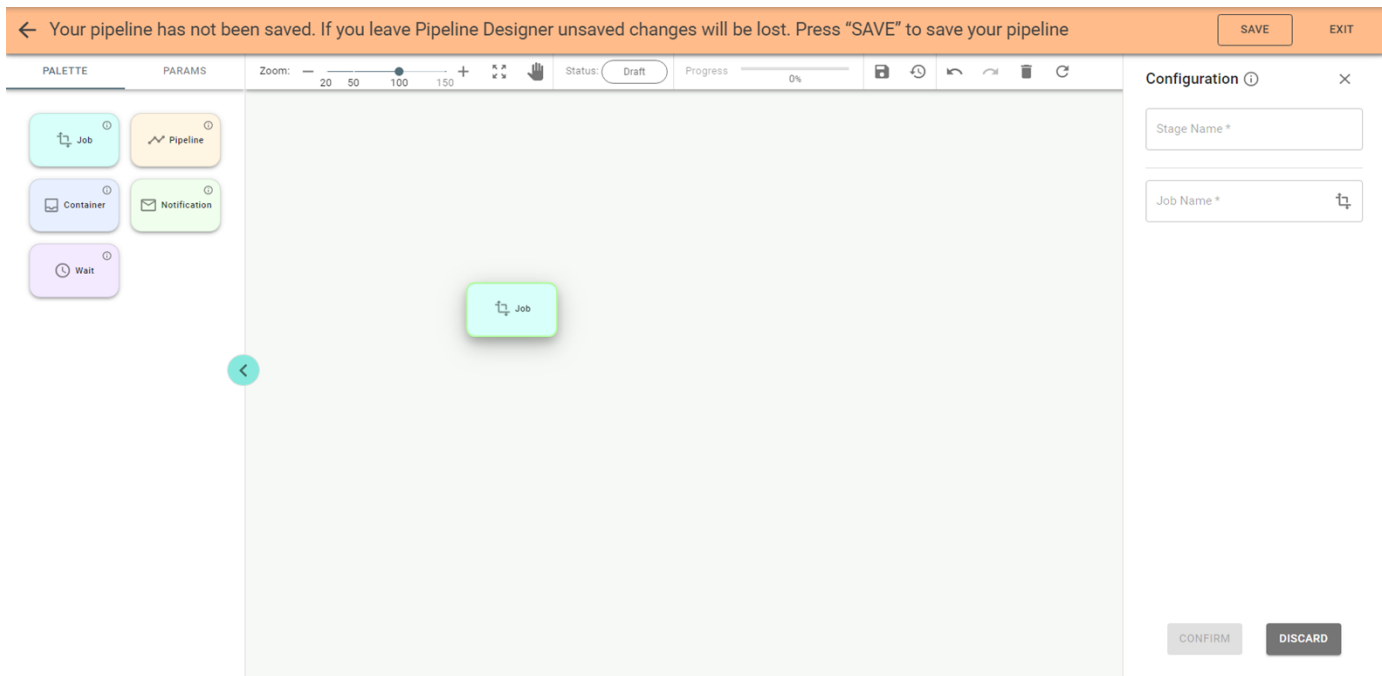



Pipeline is a combination of *Job*, *Pipeline*, *Notification*, *Container* and *Wait* stages. The *Notification* stage is most often added to the configuration to notify about job/pipeline stage failure/success.

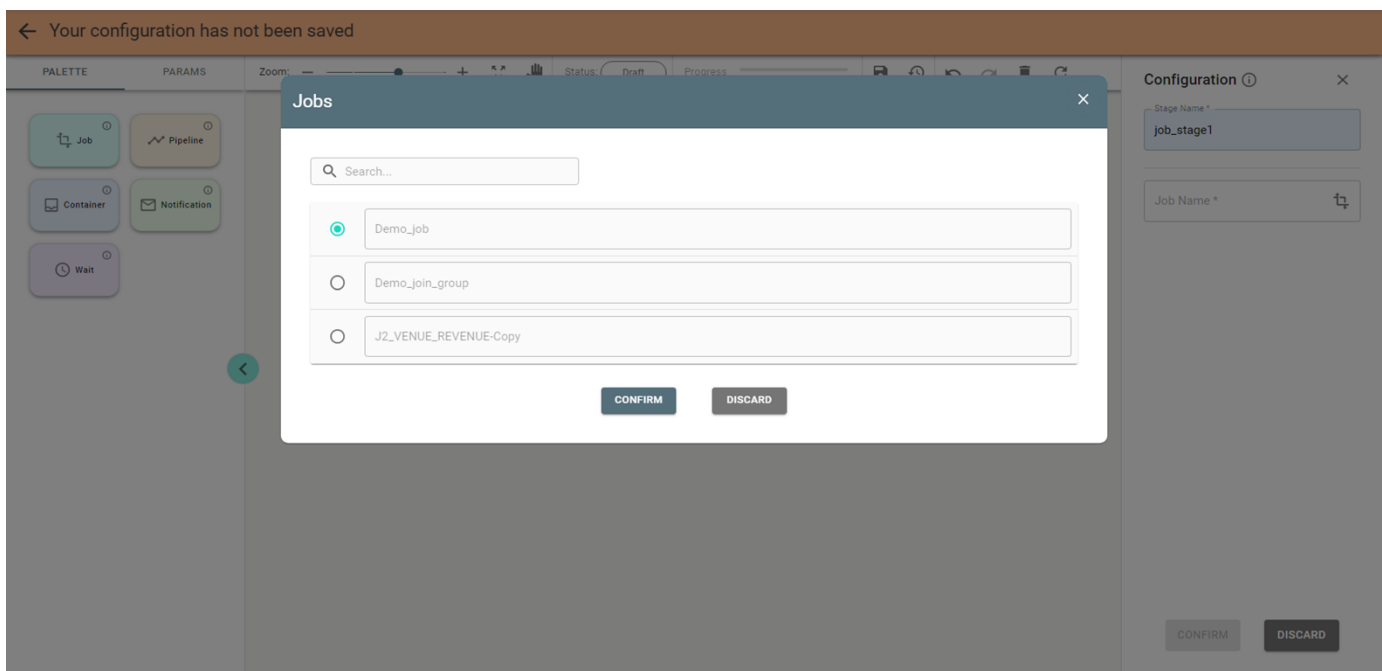
Drag the *Job* stage to the canvas:



Double-click on the stage opens the configuration panel on the right:



Enter the name for the stage and push  to select a job.



Pick the job and push the *Confirm* button.

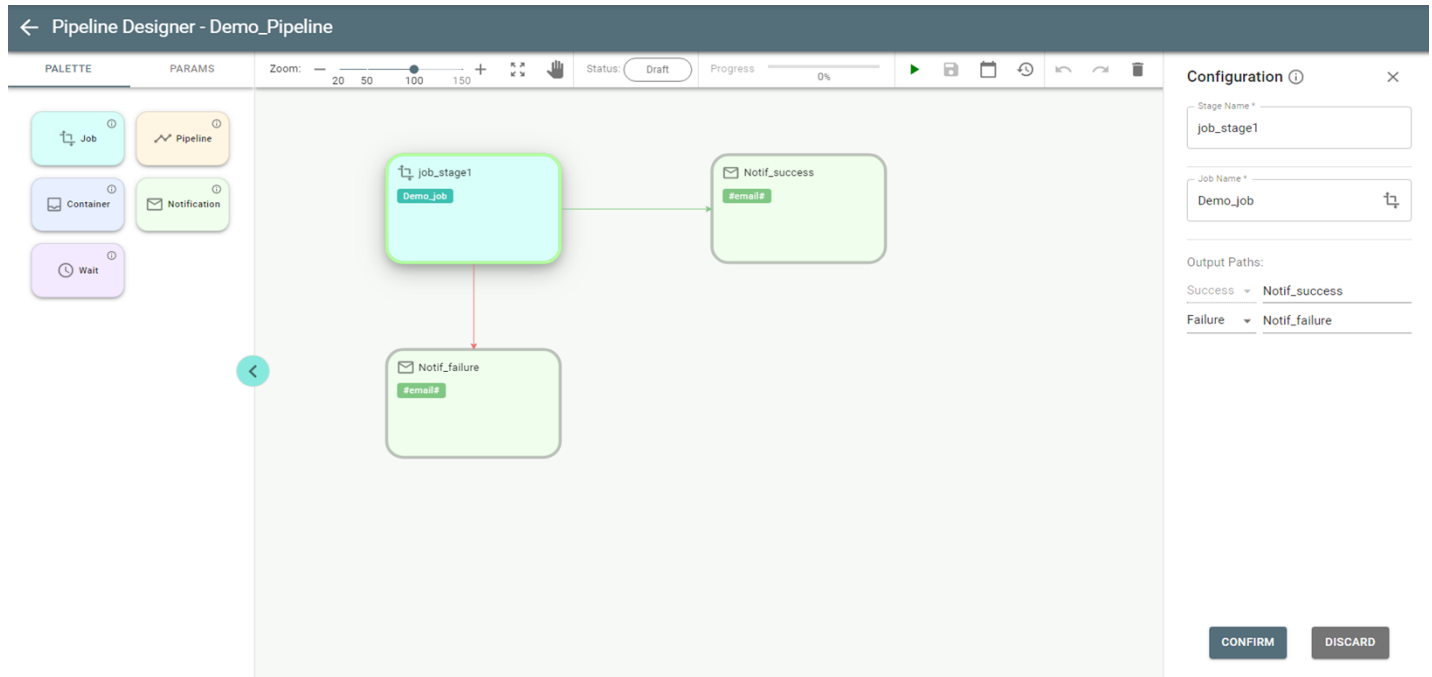
Save the stage by pushing the *Confirm* button on the panel. Push the *Save* button on the header if you want to save the pipeline at this step.

Similarly to the *Job* stage the *Pipeline* stage can be used if you want to evoke existing pipeline within your pipeline. Drag and configure other stages. Connect them in the same manner as in *Job Designer*.

Note: you can also add a stage by double clicking its tile on the palette.

You can link stages based on their success or failure. After connecting them to each other you can choose the *Success* or *Failure* link on the *Job* stage configuration panel. There can be only one connection for failure.

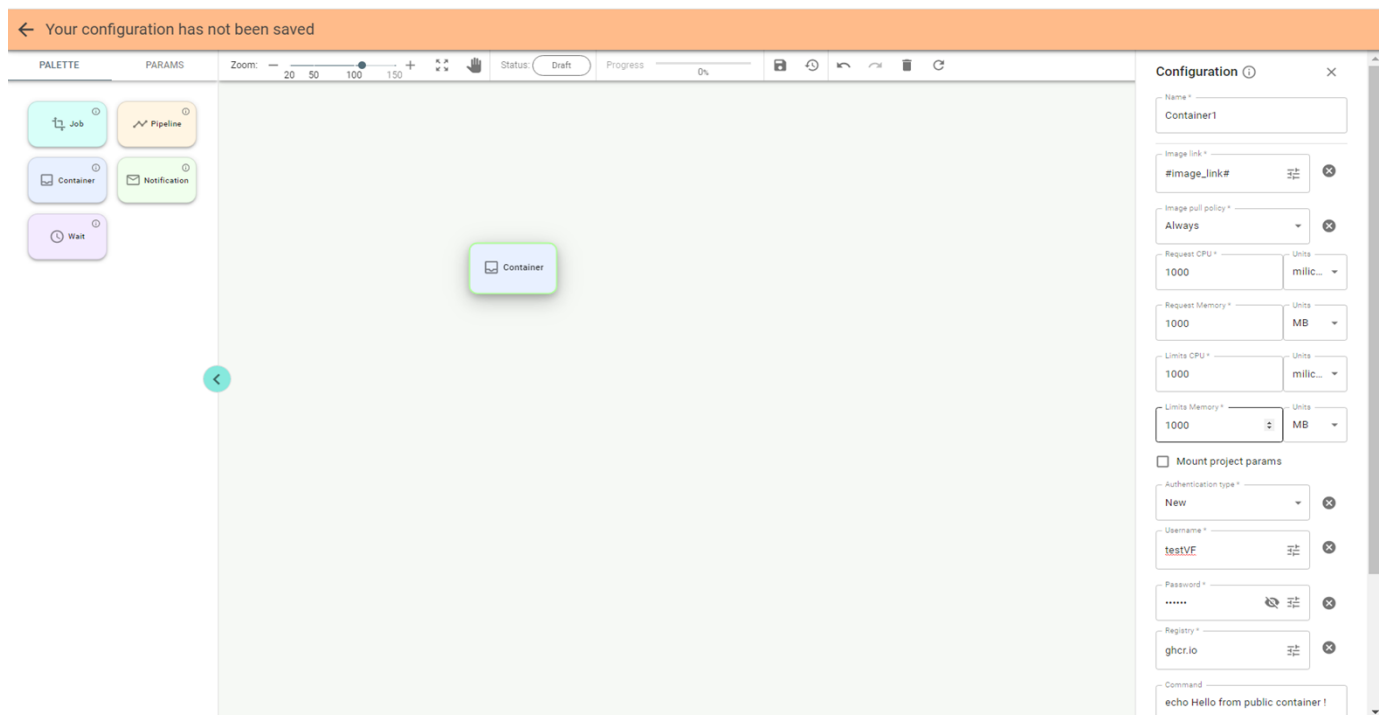
See the example of configured pipeline:



Before the first run or after updating, the status of the pipeline is *Draft*. See each stage border painted in a *Gray* color, which stands for *Draft*.

The *Container* stage is used to run custom commands for executing any logic in a pipeline. You can use docker images instead of custom commands.


Start creating a pipeline by dragging the *Container* stage to the canvas and entering parameters in the Configuration panel:



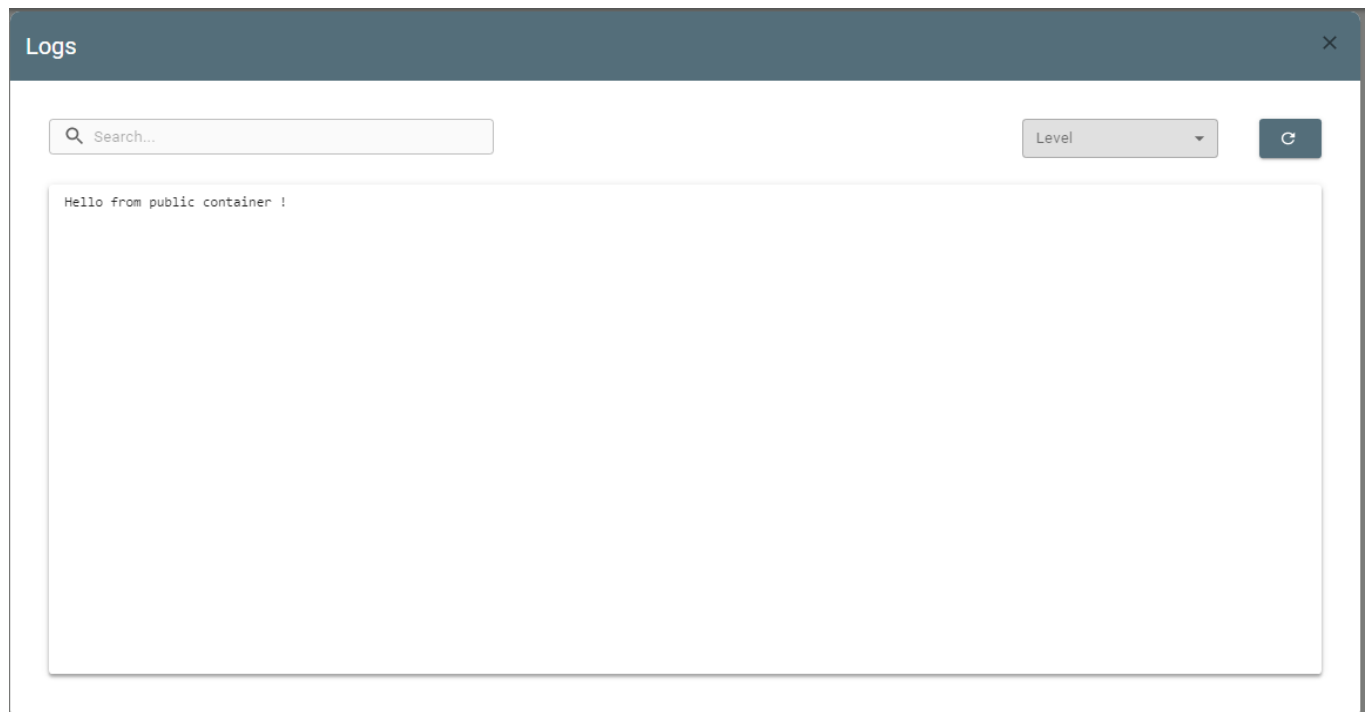


The *Container* stage has the following fields in the configuration:

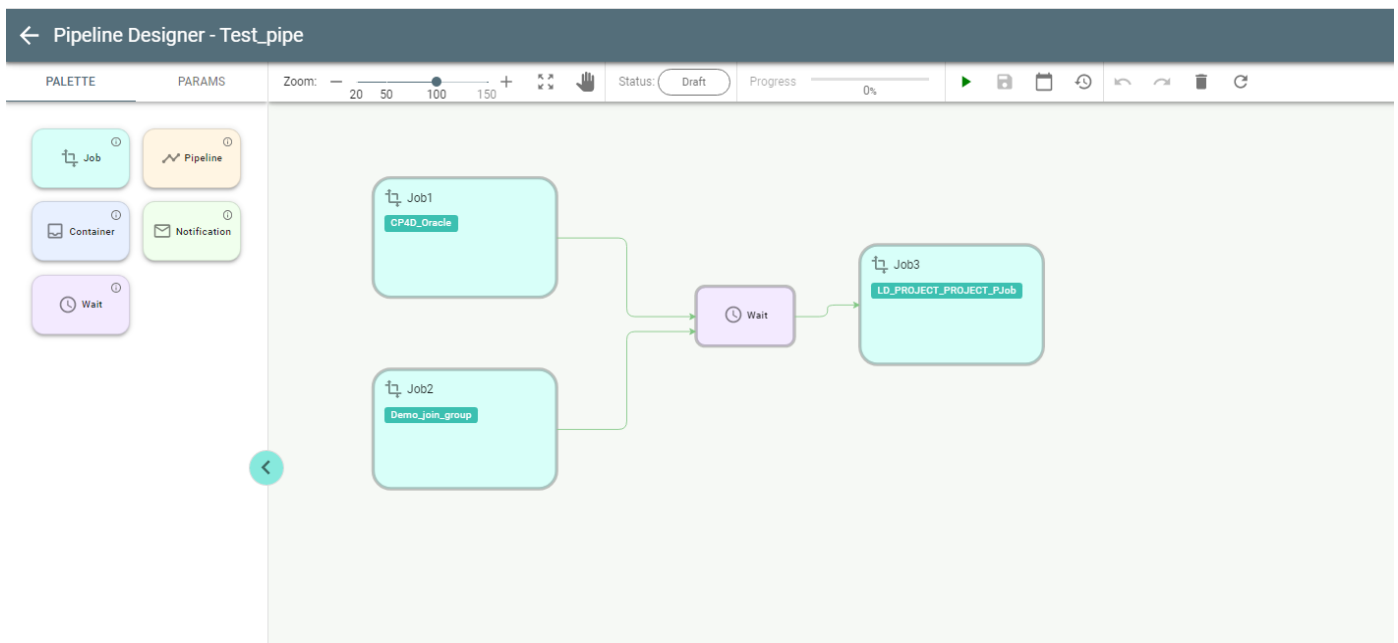
- ✓ *Image link*. Docker image path.Examples:
- ✓ `mysql`, `mysql:latest`,
- ✓ `bitnami/argo-cd:2.1.2`, `localhost:5000/bitnami/argo-cd:2.1.2`, `registry.redhat.io/rhel7:latest`.
- ✓ *Image pull policy*. Defines when the image is pulled (downloaded).Possible values:
  - *If not present* – is downloaded only if it does not exist locally;
  - *Always* – is downloaded before each start;
  - *Never* – is not downloaded, a local copy is used.
- ✓ *Requests and Limits CPU*
- ✓ *Requests and Limits memory*
- ✓ *Mount project parameters*. Defines whether to mount all project parameters as environmentvariables inside the Pod.
- ✓ *Authentication type*
- ✓ *Authentication mode* can be one of these:
  - *Not applicable*: image pull secrets are not required as the image is pulled from the public registry;
  - *New*: create a new image pull secret on the fly by providing all necessary information;
  - *Provided*: use the existing image pull secret by providing its name (Image pull secret name).
- ✓ *Image pull secret name*. Name of the secret to pull the image. Note that it must exist within thesame k8s namespace as the current pipeline.
- ✓ *Username*
- ✓ *Password*
- ✓ *Registry*. Name of the registry for authentication.
- ✓ *Command*. The command to run once the Pod is created.

Important: the *Container* stage has Logs button  so you can see logs.

If the pipeline completed successfully, the logs display the message contained in the *Command* field in the configuration of the *Container* stage.



The *Wait* stage is a dummy stage with no configuration, used for running multiple jobs in parallel as in this example:



### 5.3. Pipeline Designer Functions Overview

The following functions are available in *Pipeline Designer*:

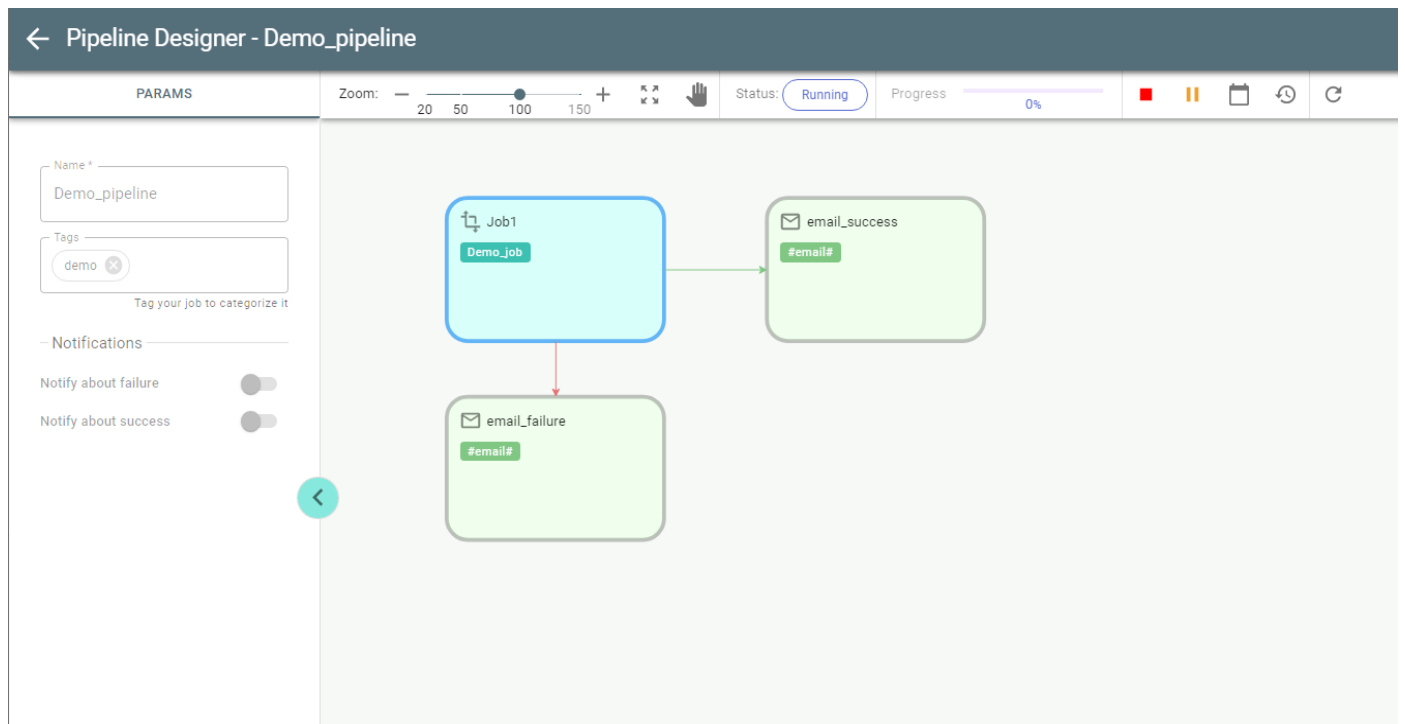
- Zoom functions:
- Move elements:
- Move elements/screen:
- Show pipeline status:
- Show pipeline progress:
- Run pipeline / Stop pipeline (for running)
- Save pipeline
- Create schedule for pipeline
- View pipeline history
- Undo / Redo operation on canvas
- Remove element from canvas
- Refresh

### 5.4. Pipeline Execution

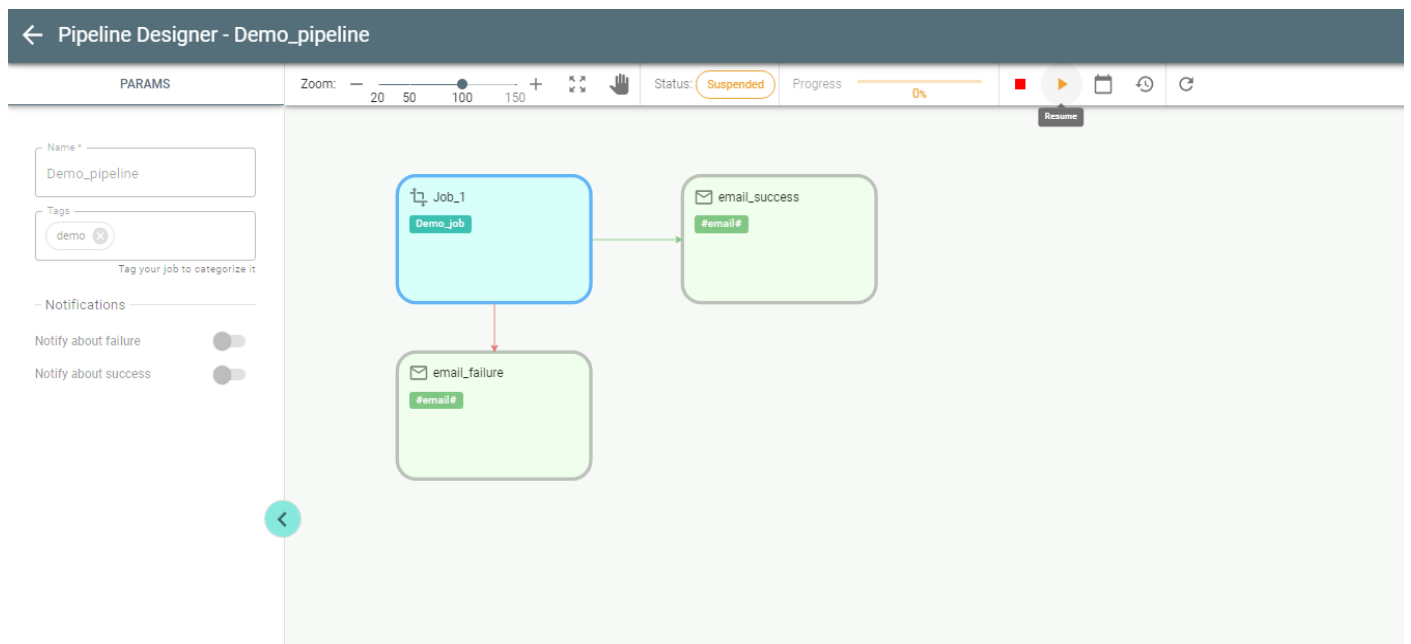
If you run a pipeline, as in the above example, its status changes from *Draft* to *Pending* and then to *Running*. Push Refresh to update the status.

The border of the stage currently running is painted in *Blue*:

While running a pipeline can be stopped or suspended with Stop/Suspend buttons respectively: ■ ||

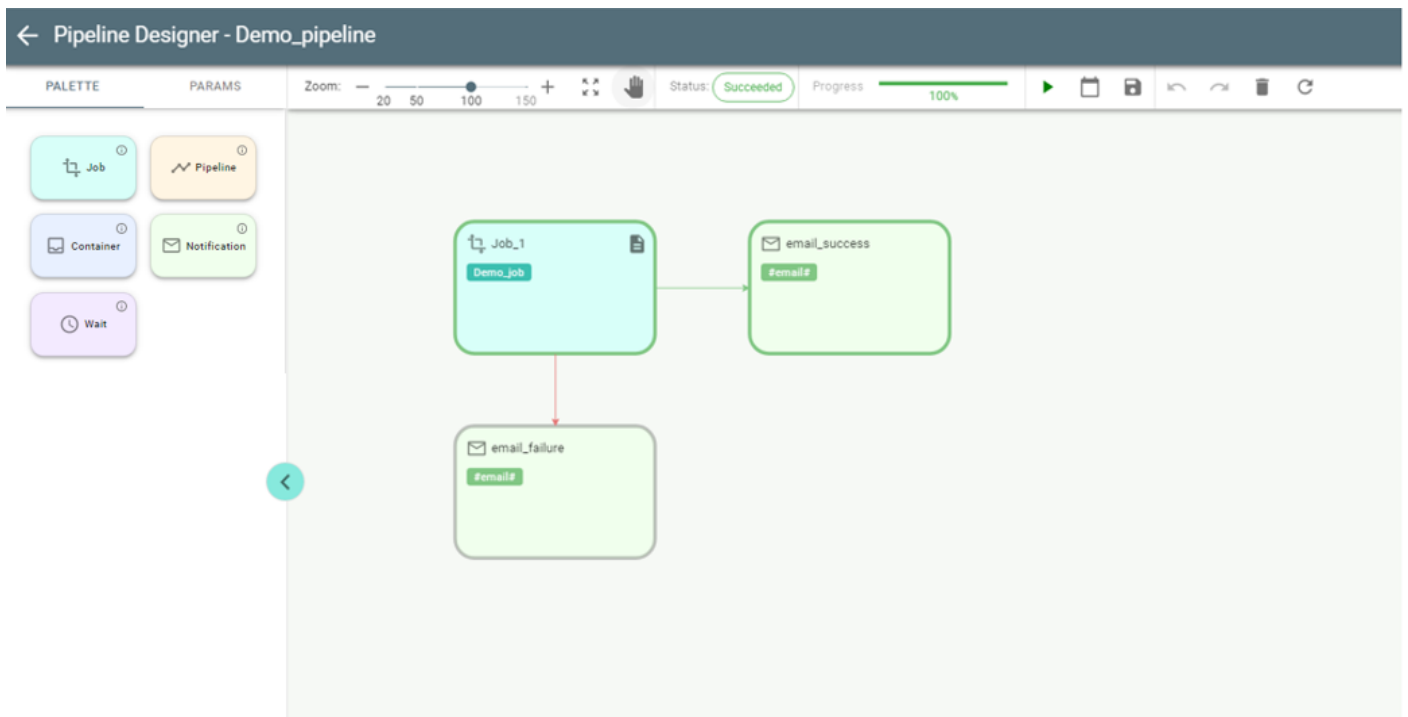


Once suspended it can be resumed with Resume button:

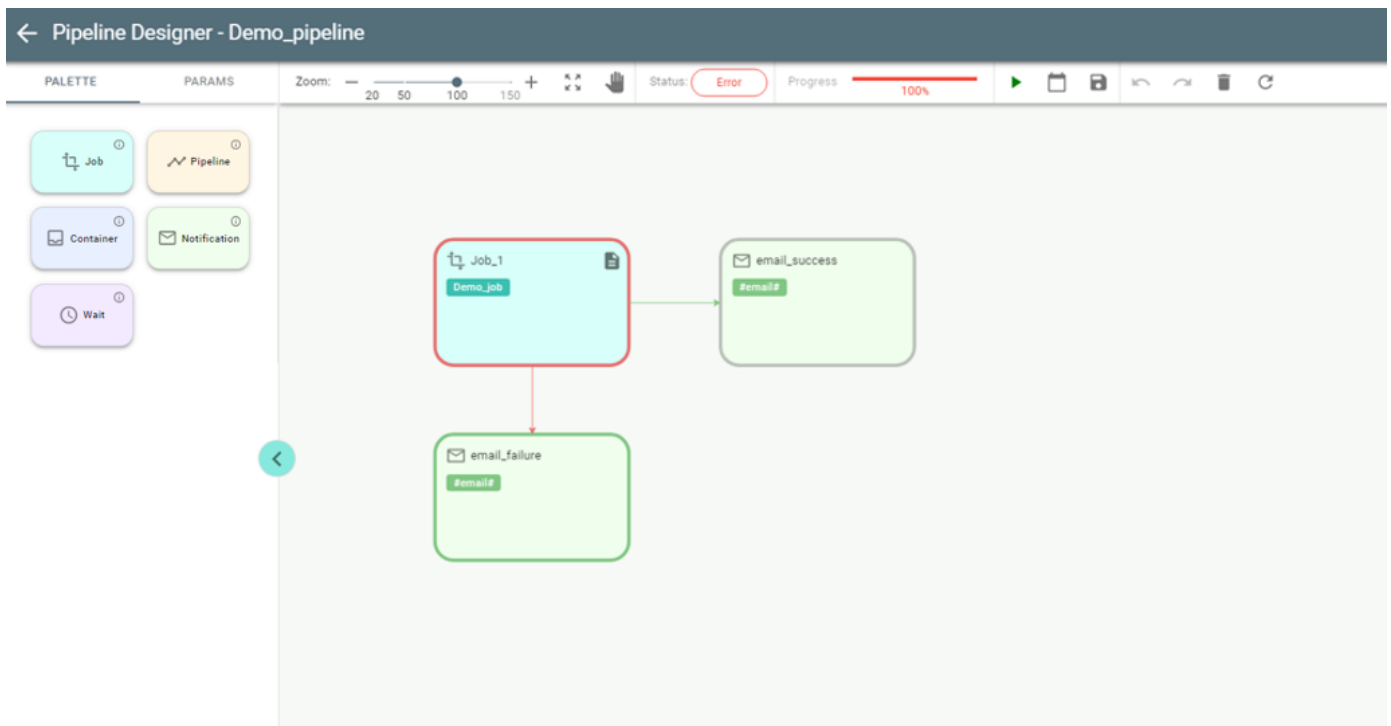


If a pipeline succeeds, all completed stages are painted in *Green*, indicating success.

The stages configured for failure scenario (red arrow) remain *Gray* as a *Draft* as they have not been executed.



If a pipeline fails, then the **Red** border indicates the failed stage:



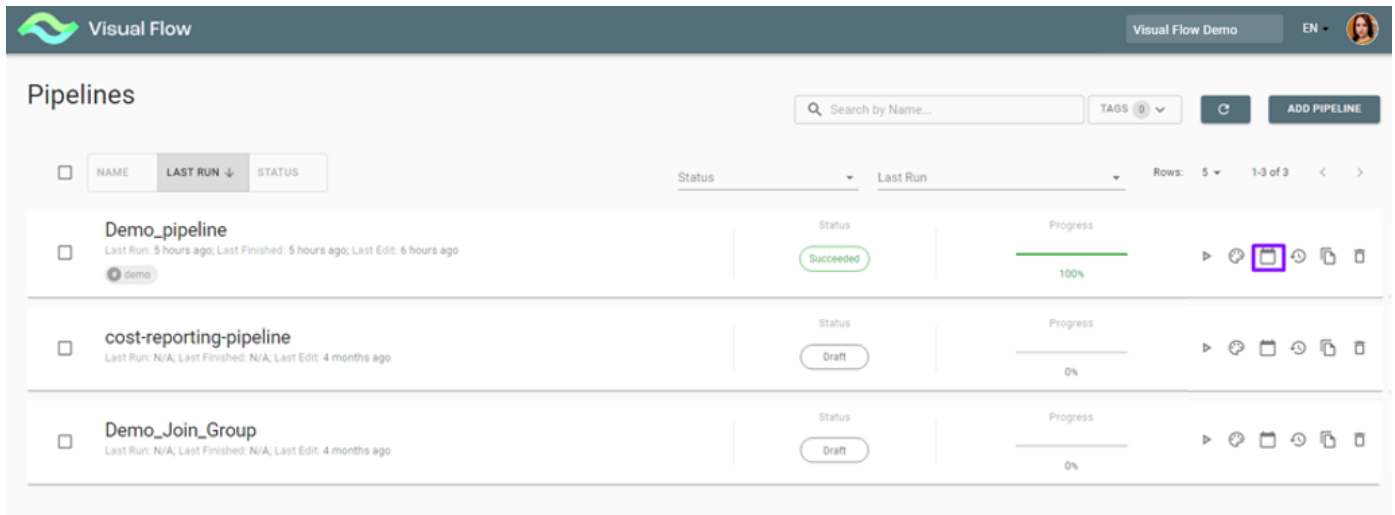
A failed pipeline can be re-run with **Error**  button either from Pipelines overview page or *Pipeline Designer*.

Important: *Job* stage has the *Logs* button  for analyzing logs of a certain job.

Use the *History* button  to view information about previous runs of the pipeline.

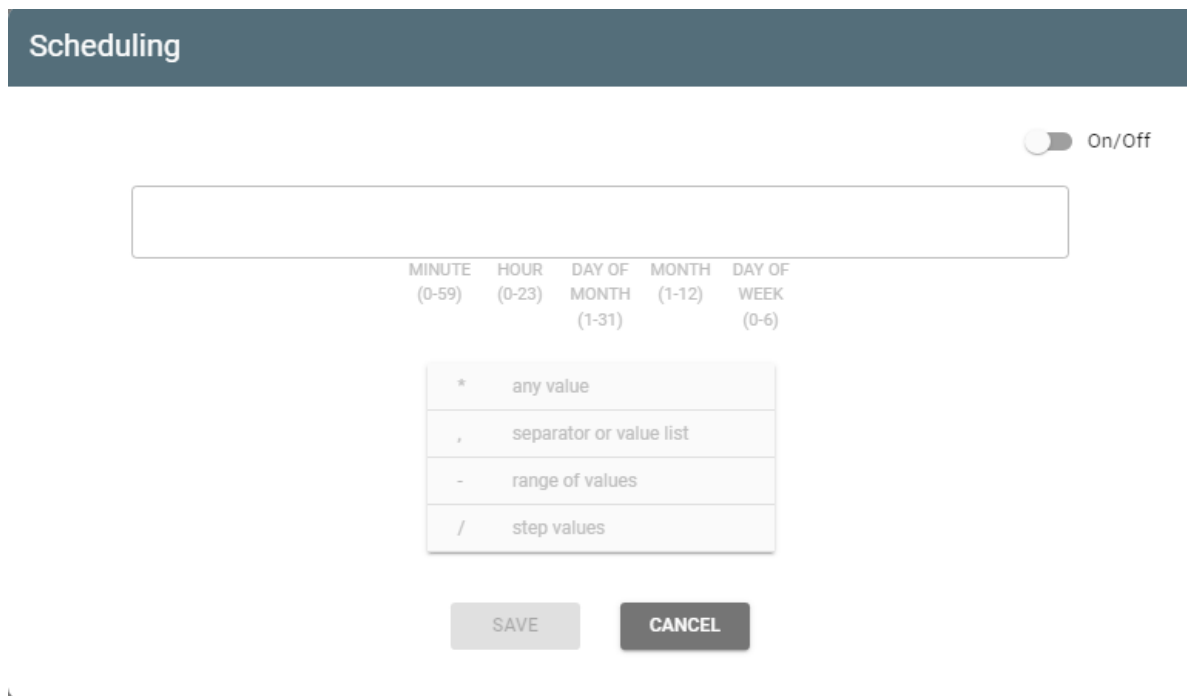
## 5.5. Scheduling a pipeline.

You can schedule a pipeline to run with the *Scheduling* button:



The screenshot shows the Visual Flow Pipelines management interface. At the top, there's a search bar and a 'TAGS' dropdown. Below, a table lists pipelines. The first pipeline, 'Demo\_pipeline', is in a 'Succeeded' state with 100% progress. A purple box highlights the 'Scheduling' button (calendar icon) in the actions column for this pipeline. The other two pipelines, 'cost-reporting-pipeline' and 'Demo\_Join\_Group', are in a 'Draft' state with 0% progress.

It opens the *Scheduling* window:



The 'Scheduling' window is displayed. It features a title bar, an 'On/Off' toggle switch, and a large text input field for scheduling. Below the input field, there are labels for time units: MINUTE (0-59), HOUR (0-23), DAY OF MONTH (1-31), MONTH (1-12), and DAY OF WEEK (0-6). A dropdown menu is open, showing options: '\*' any value, ',' separator or value list, '-' range of values, and '/' step values. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

Switch the toggle on and enter values of minute/day/day of month/month/day of the week through spaces according to the tips:

## Scheduling

☒ On/Off

"At 01:01"

Next at: 2022-09-23 21:01:00 UTC

1 1 \* \* \*

MINUTE	HOUR	DAY OF	MONTH	DAY OF
(0-59)	(0-23)	MONTH	(1-12)	WEEK
		(1-31)		(0-6)

*	any value
,	separator or value list
-	range of values
/	step values

SAVE

CANCEL