# **Data Control Tower Home**

Data Control Tower

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# 1 Welcome to the Data Control Tower documentation!

This information explains how to deploy Data Control Tower (DCT), use its features, or tune its configurations for optimal performance. The content has been organized into several categories, available from the lefthand navigation.

#### List of Data Control Tower documentation versions in PDF format.

- DCT 24.0.0 documentation.pdf<sup>1</sup>
- DCT 23.0.0 documentation.pdf<sup>2</sup>
- DCT 22.0.0 documentation.pdf<sup>3</sup>
- DCT 21.0.0 documentation.pdf<sup>4</sup>
- DCT 20.0.0 documentation.pdf<sup>5</sup>
- DCT 19.0.0 documentation.pdf<sup>6</sup>
- DCT 18.0.0 documentation.pdf<sup>7</sup>
- DCT 17.0.0 documentation.pdf<sup>8</sup>
- DCT 16.0.0 documentation.pdf<sup>9</sup>
- DCT 15.0.0 documentation.pdf<sup>10</sup>
- DCT 14.0.0 documentation.pdf<sup>11</sup>
- DCT 13.0.0 documentation.pdf<sup>12</sup>

<sup>1</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2024.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737483479679&version=1

<sup>2</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2023.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737483257502&version=1

<sup>3</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2022.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737483244666&version=1

<sup>4</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2021.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737483228487&version=2

<sup>5</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2020.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478129010&version=1

<sup>6</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2019.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478129309&version=1

<sup>7</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2018.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478129567&version=1

<sup>8</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2017.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478129789&version=1

<sup>9</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2016.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478133248&version=1

<sup>10</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2015.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478133041&version=1

<sup>11</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2014.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478132846&version=1

<sup>12</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2013.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478132605&version=1

- DCT 12.0.0 documentation.pdf<sup>13</sup>
- DCT 11.0.0 documentation.pdf<sup>14</sup>
- DCT 10.0.0 documentation.pdf<sup>15</sup>
- DCT 9.0.0 documentation.pdf<sup>16</sup>
- DCT 8.0.0 documentation.pdf<sup>17</sup>
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- DCT 4.0.0 documentation.pdf<sup>21</sup>
- DCT 3.0.0 documentation.pdf<sup>22</sup>
- DCT 2.2.0 documentation.pdf<sup>23</sup>
- DCT 2.0.0 documentation.pdf<sup>24</sup>

<sup>13</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2012.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478132383&version=1

<sup>14</sup>https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2011.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478132185&version=1

<sup>15</sup>https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%2010.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478131989&version=1

<sup>16</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%209.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478131753&version=1

<sup>17</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%208.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478131516&version=1

<sup>18</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%207.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478131308&version=1

<sup>19</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%206.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478131073&version=1

<sup>20</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%205.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478130878&version=1

<sup>21</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%204.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478130639&version=1

<sup>22</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%203.0.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478130436&version=1

<sup>23</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360513542/DCT%202.2.0%20documentation.pdf? api=v2&cacheVersion=1&modificationDate=1737478130244&version=1

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# 2 Quick references

- Overview<sup>25</sup>
- Deployment<sup>26</sup>
- New features<sup>27</sup>
- Fixed issues<sup>28</sup>
- Concepts<sup>29</sup>

<sup>25</sup> https://dct.delphix.com/docs/latest/dct-overview 26 https://dct.delphix.com/docs/latest/deployment 27 https://dct.delphix.com/docs/latest/new-features 28 https://dct.delphix.com/docs/latest/fixed-issues 29 https://dct.delphix.com/docs/latest/dct-concepts

# 3 Release notes

This section is used to learn what the newest version of Data Control Tower has to offer. In addition, the fixed and known issues per version are detailed.

- New features (see page 22)
- Fixed issues (see page 40)
- Supported versions and upgrade matrix (see page 47)
- Deprecated and end-of-life (see page 49)

# 3.1 New features

# 3.1.1 Important notes

- DCT Core is now available for all Delphix customers with an active license.
  - This edition of DCT grants access to a modern Continuous Data (CD) UI and read-only Continuous Compliance capabilities for up to two CD engines and one CC engine, along with critical platform features like DCT Tags and global access control. More information can be found in the DCT overview<sup>30</sup> page.
- It is highly recommended that new DCT installations are performed on Kubernetes<sup>31</sup>, OpenShift<sup>32</sup>, or the DCT Appliance<sup>33</sup>.
  - DCT support for Docker Compose deprecated with DCT version 13.0.0 (released in Jan 2024), starting a 12-month depreciation period for all Docker Compose deployments. Support will be continued until January 2025. Production DCT workloads in Docker Compose are not supported.
- DCT currently supports Continuous Compliance engines on version 6.0.13.0 and up, however, Delphix highly recommends upgrading Compliance engines to version 20.0.0.0 before connecting them to DCT. Please see this technical bulletin<sup>34</sup> for more details.

<sup>30</sup> https://dct.delphix.com/docs/latest/dct-overview

<sup>31</sup> https://dct.delphix.com/docs/latest/installation-and-setup-for-kubernetes

<sup>32</sup> https://dct.delphix.com/docs/latest/installation-and-setup-for-openshift

<sup>33</sup> https://dct.delphix.com/docs/latest/dct-on-engine

<sup>34</sup>https://support.delphix.com/Support\_Policies\_and\_Technical\_Bulletins/Technical\_Bulletins/

TB117\_Engine\_Sync\_Import\_and\_Algorithm\_Rekey\_Operations\_May\_Fail\_Unexpectedly\_on\_Engines\_Registered\_With\_ DCT

# 3.1.2 Release 2025.1.0

Change in version naming convention

The new version naming convention is intended to provide better context on the timeframe of the release.

- Curated Views
- Job Collections
- Engine Storage Capacity view

Navigate to Data > Data Infrastructure > Data Engines, then click the view button for an engine. In the details page, click the Storage tab. The graph will populate with relevant data and the key at the bottom of the graph helps identify the usage. Below the graph is a table that lists object name, is replica, type, total size, base size, snapshot size, log size, and an option to delete.

- TDE for OKV Support
- Support for Credential Environment Variables
- VDB Group Self Refresh Support

# 3.1.3 Release 24.0.0

#### • Data Control Tower Core

DCT Core is now available for all Delphix customers with an active license. This edition of DCT supports two active Continuous Data and one Compliance connections.

#### Central Tag management

All tags in DCT can now be visualized via the Tag Management page on the admin tab. This experience improves visibility of where and how tags are being used as well as the capability to drill down into a specific tag.

#### Delete action for snapshots

Enables users to delete dSource or VDB snapshots directly from the Timeline History tab, using the delete button available under the action menu for each snapshot. Snapshots can only be deleted if they have no dependencies and are not the latest snapshot. Dependencies include VDBs or bookmarks created from the snapshot. This ensures the integrity of dependent data before allowing deletions.

#### Add instance for MSSQL environments

The installations UI in the Data tab of the Environment details page now includes repository insights for MSSQL environments, offering view and edit access to repositories in that environment. Expand the name of a repository to see Installation Details like whether it allows provisioning, is used for staging, version number, installation path, and much more. Click the Edit button to change the configurations.

#### • VDB Groups: Self-refresh

A VDB Group can now be refreshed to its latest set of snapshots on demand. This operation was formally known as Rewind.

#### • iSCSI (Windows) and NFS (Unix) encryption support

This feature introduces a new option to enable or disable encryption on an environment. A new Encryption tile has been added in the Overview tab of an Environment details page showing the

encryption status (if applicable) for that environment. Clusters and Windows source hosts will appear as N/A. Click the Edit button on that tile to select or deselect the encryption option.

#### Terraform provider: VDB update-in-place

Introduced the ability to modify virtual database (VDB) resources created through the Terraform provider. This enables drift detection of your data sets. In addition, we released the "import" capability as a beta feature to enable VDBs created outside to be managed via Terraform.

## ServiceNow Spoke: Refresh from Parent and Relative

We have added capabilities to support two new catalog items: Refresh from Parent and Relative Snapshots. Contact your Account Team to learn more!

# 3.1.4 Release 23.0.0

#### Continued rollout of DCT Appliance

As an alternative to the existing Kubernetes-based deployment model, DCT now offers a VM-based closed appliance model for net new deployments of DCT. This model closely resembles the traditional engine hosting model, offering a simpler management experience for admin teams.

#### VDB Groups enhancements

Introduced the full standard action drop down set to VDB Groups, including Start, Stop, Enable, Disable, Lock, and Unlock. An option has been introduced to refresh the VDB Group immediately after creation in the VDB Group Wizard. This will refresh each VDB in the VDB Group to the latest snapshot of its parent.

#### Update Delphix Connector properties

This feature introduces a new UI, enabling users to view and edit the Delphix Connector installed on their Windows Host. The user must be running a DCT Engine with an added Windows environment to view/edit the connector details.

#### Date/Time refresh

When selecting an unavailable point in time in the Refresh  $\rightarrow$  Date/Time wizard, the two closest options are now presented.

#### Password updates and API Key rotation

Users can re-generate API Key and update their DCT passwords. Administrators can set an expiration policy in the Admin  $\rightarrow$  Authentication tab to improve security practices.

#### Session timeout

By default, after one hour of inactivity, users will be logged out of DCT. Administrator can set a preferred timeout policy in the Admin  $\rightarrow$  Authentication tab.

# 3.1.5 Release 22.0.0

#### New DCT Appliance deployment method

As an alternative to the existing Kubernetes-based deployment model, DCT now offers a VM-based closed appliance model for net new deployments of DCT. This model closely resembles the traditional engine hosting model, offering a simpler management experience for admin teams.

• VDB Groups UX enhancements DCT has provided a major update to VDB groups including a new UI to view and manage grouped VDBs and operational enhancements, such as bookmark support. All of this provides an improved integration testing experience for Delphix customers.

• Faults, alerts, and actions data Continuous Data Engine details now shows faults, alerts, and actions data to provide better auditing.

#### Bulk environment refresh support

DCT can now perform environment refresh from both the API and UI for one or more environments at the same time with a single operation. This is particularly powerful when combined with tag-based filtering.

#### Enterprise Compliance Visibility

DCT provides visibility of nearly all Compliance Engine objects. This critical central reporting capability provides filterable list views with richly detailed contextual views customized for each object type.

#### • One (1) hour session time-outs

A new enhancement that allows customers to configure both session expiry and inactivity time. The user's session will expire based on the configured expiry duration. Additionally, the configured inactivity time will determine when the session expires if there is no activity within that specified window. These properties can be configured using the global properties API. The default expiry time is 24 hours and inactivity time is 1 hour.

#### API Key management and rotation

Introduced the ability to define an API Key expiration time. In addition, administrators can now add, regenerate, or delete an API key on any user account.

• ServiceNow Spoke Added certification for the Vancouver and Washington releases.

# 3.1.6 Release 21.0.0

- VDB Group configuration management (add/remove VDBs and manage the order of execution) DCT can add/remove VDBs to/from the group and arrange the order from which bulk operations (like refresh) will be applied. This is particularly crucial for data sources like Oracle EBS, where application files and the underlying Oracle database need to be refreshed in a specific order.
- VDB Group Bookmark creation support
   DCT can create a bookmark across one or more VDBs contained in the group, to provide a human readable reference point for that specific point in time.

#### VDB Group Refresh support

DCT can refresh one or more VDBs contained in the group based on a specific bookmark reference or to the latest snapshot on each VDBs' respective parent (VDB or dSource).

#### Oracle Staging Push support

DCT can now manage Oracle-based staging push ingestion from the DCT UI, including the updating of those source settings.

#### Additional Oracle provisioning modes support

DCT has added multiple provisioning mode features for Oracle VDB provisioning including:

- Invoke datapatch support after provisioning VDB/vPDB SQL updates.
- Support for customized local listeners for RAC VDBs and vCDBs.
- The ability to update Oracle listeners.

#### • Engine-specific faults, alerts, and actions data

DCT now reports faults, alerts, and actions data within an engine's details view to provide better auditing capabilities from the UI.

• Bulk Environment Refresh support DCT now can perform environment refresh from both API and UI for one or more environments at the same time with a single operation. This is particularly powerful when combined with tag-based filtering.

#### Compliance Application Settings Read Only

DCT can now ingest and report on all application settings within all connected engines and display those details within a list, including a detailed set of UI views.

# 3.1.7 Release 20.0.0

#### Replica reporting details

DCT can now break down object-specific detail for replication targets to pair with existing details, such as the last successfully completed replication. This will provide additional visibility for administrators tracking Disaster Recovery configurations and statuses.

#### Failover and failback support

DCT supports failover with failback support on a replica's detail screen. This enables administrators to identify downed engines and orchestrate disaster recovery centrally from DCT's user interface.

# Data Vault replication policy configuration DCT now supports the ability to configure replication profiles for Data Vault Target engines from the UI.

#### Discovery Policies (formerly profile sets) read-only

DCT now visualizes existing Discovery Policies (known as Profile Sets on a Continuous Compliance engine) on connected compliance engines. This enables administrators to visualize how the engine employs classifiers (or legacy expressions) during Sensitive Data Discovery from a single page.

#### VDB Group List and details page

DCT now visualizes VDB groups via a list view found under the Data tab that shows all VDB groups, as well as their statuses and a refresh timestamp. Viewing a VDB Group's details will show all grouped VDBs, with other insights like critical time and masking details.

#### • VDB Group creation wizard

VDB groups can now be created via the DCT UI from the VDB Group list page. This creation wizard will guide users through picking the correct VDBs with a filterable list of attributes.

#### Refresh and update bookmarks

While creating bookmarks from the timeline was introduced in the previous release, users can now update a bookmark and refresh using that bookmark directly from the Timeline, which was not previously available.

## 3.1.8 Release 19.0.0

• Snapshots and bookmarks on the VDB timeline The VDB timeline now presents snapshots and bookmarks together in chronological order, making it easier for any user to understand the bookmark's context and the rough time a refresh will take to complete from the Log Delta time.

#### Oracle dSource hook support

Hook management is now available for Oracle dSources. The Pre-Sync, Pre-LogSync, and Post-Sync hooks can be created, edited, reordered, and deleted from the dSource's Hooks tab.

#### Oracle add/update environment users

Users can now add or update Oracle environment users. This is available from the Overview tab, inside of the infrastructure Connections detail page. Users can only be added with a username and password, at present.

#### Oracle cluster node operations

Users can now add and delete cluster nodes for an Oracle environment. This feature is available under the Attributes tab inside the infrastructure Connections detail page.

#### • VDB-to-bookmark tag inheritance

The default permission model has been updated so that users who have Edit Tags permission on a VDB will also have Edit Tags permission on the VDB's bookmarks.

#### • Data Classifier support

All Classifiers and Expressions (Legacy), from any connected Continuous Compliance engine, can be viewed within DCT's Data Classifier tab. This enables administrators to better monitor their classifier configurations and easily share details with security teams.

#### Failover support

Added support for failover replication modes that administrators can use to centrally create, manage, and monitor failover and failback disaster recovery scenarios between engines from the DCT UI.

# 3.1.9 Release 18.0.0

#### Custom hook support

Hook support has been augmented for pre-existing VDBs. Users can now create, update, and delete hooks, in addition to determining the hook execution order.

#### Selective Data Distribution (SDD) replication support

DCT now supports a SDD-specific user experience that creates replication profiles specifically for compliant prod-to-non-prod VDB distribution for developer access to masked data.

#### • Rule Sets detail views

DCT's Rule Set UI now includes detail views on associated jobs, table and column-level detail on masking rule assignments, and a sensitive data coverage analysis to provide a visualization of data risk.

#### Bookmark migration for VDB Groups

The Delphix Self-Service migration workflow has been expanded to now support multi-VDB containers. These will be recreated in DCT as VDB Groups. Read our Delphix Community blog post to learn how to migrate single or multi-VDB containers, templates, and bookmarks.

# 3.1.10 Release 17.0.0

#### • Delphix Self-Service to DCT migration utility

Administrators can now migrate existing Delphix Self-Service bookmarks, containers, and permissions to DCT.

#### Compliance enterprise visibility

This release expands the user interface to include a list view for Data Classes (formerly known as domains), Compliance File Uploads, Rule Sets, and Connectors. In addition, many of those objects now have a "Details" view that highlights complex relationships and metadata to help administrators proactively manage the connected compliance estate. Rule Sets now have a list view.

DATA CONTROL Home Data TOWER	Compliance Insights Admin		<b>B</b>
Connector > mssql Carlos Sequences 20-DATABASE-1 Overview Jobs Rulesets	Compliance Access		Actions -
Last Profiled Apr 10, 2024 7:46 AM PDT	Data Elements Total 22	Sensitive Data Elements 14	Sensitive Records
Data Element Coverage Data element coverage across all known rule	e sets.	Records Coverage Data records coverage across all known rule	sets.
Not Sensitive - 8   36%	ive & Masked - 14   64% 🛛 ┥ 1 / 2 🕨	Not Sensitive - 721   88%	tive & Masked - 100   12% 🚽 1 / 2 🕨

1 A connector's Details view featuring compliance coverage that identifies sensitive data risk and scope determined from profiling.

#### Replication management

Admins can create, update, monitor, and delete replication profiles. Replication statuses are now visible within the DCT UI to visualize completed, running, stopped, or inactive replication streams paired with meaningful metadata like last run time.

Last Replication Status $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	Name	Source	Target	Mode	
May 14, 2024 5:04 AM PDT	sd-test-profile2	km-engine	sd-dev.	Engine Data Replication	View >
May 8, 2024 6:13 AM PDT	km-engine-1	km-engine	km-engine	Engine Data Replication	View >
May 7, 2024 2:40 AM PDT	yt4	engine	target-engine	Engine Data Replication	View >
May 10, 2024 5:05 AM PDT	cdb_vcdb_bugfix	engine	target-engine	Engine Data Replication	View >
May 13, 2024 11:36 PM PDT	test-1	engine	target-engine	Continuous Vault	View >

#### Auto-tagging of custom Tags

Users can now define (per connected engine) a series of custom tags applied to all objects pulled into DCT via telemetry, enabling a fast and efficient way to populate tags within DCT. This will stay in sync with the engines since objects are created or deleted until the feature is deactivated, during which time the tags will persist.

-	Warning Tags can Grant Access Caution: Auto-tagging can modify object access. Review permissions carefully after auto-tagging objects.					
Inclue	de engine dataset	group information as a tag	g on objects with the ke	ey "dlpx-dataset-group"		
	0	s a tag on objects with the	, , ,			
	te custom tags or	n all objects from this engi	ne			
Applicat	ion: Alpha ⊗			Remove		
Data Cer	nter: West Coast	8		i Remove		
Primary	User: John Smith			<b>i</b> Remove		

#### Oracle CDB operations

Centrally start, stop, and delete Oracle CDBs from DCT and report on those CDBs with enhanced capabilities using the addition of the enabled, group\_name, and status attributes.

### • Bookmark data timestamps The VDB Timeline and Bookmarks pages now have bookmark data timestamps available to enable users to track the lineage of the source data.

#### DCT reporting framework updates

We have introduced column-based filtering on all list views to provide a spreadsheet-like user experience. Session retention has also been introduced for the VDB list view to maintain page configurations such as filters, sorting, search, etc. even after navigating off of the page.

Compliance uploads (read-only)

This feature shows uploaded files that are on connected Continuous Compliance Engines in DCT. Each upload item will show information about the upload, like file name, file reference, size, and more. It also shows the "consumer", the object that uses and depends on the file, under the Consumers tab or by using the /masking-file-uploads/{maskingFileId}/consumers API endpoint. At this time, the feature is read-only and only shows files associated with custom algorithms and custom extended plugins. Other files that a user might have on a Continuous Complaince Engine are not yet shown (such as Connector files, for example).

## 3.1.11 Release 16.0.0

#### • Data Risk report

DCT now shows sensitive data risk for all database connectors on DCT-connected Continuous Compliance Engines. This includes details on whether a data connection has been profiled, contains sensitive data (discovered during profiling), and whether that sensitive data has been masked.

Record coverage metrics are only supported on Continuous Compliance Engines running version 20.0.0.0 or higher. File masking connections will be added in subsequent releases.

#### Block Storage report (capacity trends)

DCT now persists and shows storage trend data for connected Continuous Data Engines. This data defaults to aggregating all connected engine storage, but can be filtered to show a specific engine or group of engines. This report also includes a three and six month projection to assist administrators with capacity forecasting.

- Block Storage report (Top 5 Storage Usage Trends): Building off the Capacity Trends view, DCT shows a breakdown of the top 5 engines (by used capacity) on a stacked trend chart to add a level of granularity on the largest storage consumers. This chart can be filtered via search and includes a projection capability for forecasting.
- Block Storage report (Top N Storage Capacity): DCT now drives better granularity on block storage detail (Reserved, dSource, VDBs, Free Capacity) at the engine level. This view defaults to the top 10 or 15 engines by block storage volume, but this view can be filtered using search.
- Storage Savings report

DCT now shows a granular Storage Savings view to assist users in determining aggregate object counts, storage consumption, and estimated savings. This report defaults to all objects on all engines, but can be filtered via search.

Autotagging

DCT now has the ability to propagate engine-based groupings as tags in DCT. This includes *Dataset Groups* for Continuous Data, and *Environments* and *Applications* for Continuous Compliance. This feature can be turned on at engine connection or from the engine configuration screen and will stay in sync with an engine until turned off. Auto tags will persist, but will no longer auto update.

#### Replication profile management support

Users can now create, update, and delete replication profiles centrally via DCT APIs. Additionally, DCT now has the ability to create replication profiles from the DCT UI via a wizard that can be found on the Replication Profiles List page. Additional replication UI functionality will be added in subsequent releases.

#### Oracle Container Databases enable/disable actions

DCT users are now able to better manage their Oracle container infrastructure (CDB and vCDB) centrally via the DCT API and UI with enable/disable functionality.

#### Simplified Bookmark sharing

Bookmark privileges have been updated to simplify the sharing process. By default, Bookmark visibility is set to *Private*, where a user's read and refresh Bookmark permissions are based on the user's same permissions on the parent VDB. Bookmarks can be easily shared with all compatible VDBs (i.e. VDBs with the same ancestry) by toggling the Visibility value as *Public*. This aligns closely with the sharing of bookmarks in Delphix Self-Service.

#### Source and origin Timeline display

Introduced additional detail to each Timeline on the Timeline History tab. Information helpful to users understand where their data is coming from. The Origin Source and Origin Timeline Location details the originally ingested dSource. The Parent Source and Parent Timeline Location details the last source in the lineage. This might be the original dSource, masked parent VDB, or even a sibling who shared a bookmark.

#### Enhanced Bookmark permissions

New permissions are introduced for bookmarks operations like create, read, update, etc. Bookmarks also inherit permissions from its parent dataset (VDBs and Bookmarks) now.

#### Terraform Provider

Changed the default value of wait\_time to 0 and removed the storage\_size variable to resolve upgrade issues. In future versions of the Terraform Provider, full upgrade-in-place support will be implemented.

#### Azure support for PasswordVault

Azure support is now added for PasswordVault, joining HashiCorp and CyberArk.

# 3.1.12 Realase 15.0.0

#### Enhanced bookmarks organization/search

The bookmark user experience, including search on VDB and dSource Details pages, has been updated. VDB visibility on the central bookmark, the VDB's bookmark, and VDB wizard pages has been improved. Bookmarks are also supported via DCT-orchestrated replication.

#### Timeline History UX updates

DCT has consolidated the Active Timeflow and Timeflow History tabs into a single Timeline tab. The new page is similar to the former timeflow history, but now with a search bar and sorting capabilities. You can now sort upon timeline activation [default], timeline creation, parent timeline location, and origin timeline location to enable better identification and filtering for the varying timelines of your datasets.

#### Global Compliance Object Sync Report

The compliance Global Object is the aggregate representation of all multi-use objects (algorithm, domains, rule sets, etc.) on a Continuous Compliance Engine. These objects, among others, are versioned by the Continuous Compliance Engine to clarify if there have been settings or behavioral changes. DCT now surfaces those versioning details to better illustrate if and where there are differences in objects. This could, for example, expose whether or not two engines will mask with identical outputs or not.

#### Oracle CDB Inventory report

DCT now features an Oracle Container Database (CDB) report that lists both virtual and physical resources across all connected engines, as well as associated pluggable database (PDB) relationships.

#### MongoDB and delimited file support via DCT UI

DCT now supports executing and modifying existing MongoDB and delimited file Hyperscale Compliance jobs.

#### Kubernetes driver

Support has been added for taking a VDB volume snapshot and provisioning a VDB from a snapshot. In addition, various bug fixes impacting general dataset creation and deletion have been resolved.

#### Terraform provider

There is a new Database resource in the Terraform Provider that allows users to create and delete PostgreSQL environment source configurations.

### 3.1.13 Release 14.0.0

#### New APIs for PostgreSQL

New APIs have been added, providing the function to create, update, or delete database APIs for PostgreSQL.

• Bug fixes and improvements

This release focuses on bug fixes and general improvements.

#### 3.1.14 Release 13.0.0

Algorithm centralization

To enable better visibility into compliance, masking algorithms across all connected Continuous Compliance Engines can now be centrally viewed in DCT.

#### Expanded source linking

Over the past few years, Staging Push has been introduced, allowing users to bring their own data to Continuous Data. The DCT UI now supports linking for Oracle, SQL Server using Staging Push. In addition, ASE and SDK connectors such as Postgres, Db2, MySQL, HANA, and MongoDB.

#### Hyperscale Compliance UI enhancements

Several improvements have been added, including enabling the management of Continuous Compliance Engine assignments of Hyperscale Jobs.

# DCT Toolkit enhancements Based on user feedback, several improvements have been made to the fully supported CLI for DCT. Notably, dct-toolkit allows users to provide engine names as values for 'id' options.

# Continuous Data jobs progress Users can track job progress in real-time through the Operations UI. Improved Replication visibility

Replication, used for data movement, disaster recovery protection, Sensitive Data Distribution, and more, requires setting up relationships between Continuous Data Engines. To provide better visibility on these relationships, they have been added to DCT. To further simplify this user experience, the target Continuous Data Engine and dataset are now linked together.

#### • Engine Performance trend lines

Historical trend lines have been added to the recently introduced Engine Performance reports.

# 3.1.15 Release 12.0.0

#### Delphix Kubernetes driver

Virtual databases (vDB) can be provisioned into containers through Helm charts and kubectl commands using a new, pre-built DCT integration. Teardown of these containers can also be automated, enabling ephemeral infrastructure for Kubernetes-based applications.

#### • Engine performance reports

New Continuous Data and Compliance reports have been added to improve the central management of engine infrastructure performance. You can now view allocated resources and track performance for all connected engines, including disk latency, network latency, and throughput.

#### Hyperscale Compliance jobs

DCT now has support for creating, managing, and executing Hyperscale Compliance jobs. The concept of Engine Pools have been introduced along with several other enhancements to refine the overall experience.

#### User experience improvements

Several enhancements including customizing the columns across all tables, increased color contrast for better accessibility, simplified navigation across tabs, and a variety of visual style improvements.

- Replication tag inheritance
   DCT now offers API-based simplified tag management for parent/child replication deployments, optionally syncing source tags to a target replica.
- Oracle and SQL Server source linking Linking sources for Oracle and SQL Server is now supported in the user experience, along with creating bookmarks.
- Terraform provider

A new Terraform resource facilitates creating and deleting Oracle dSources. This expands on the existing data source support with the provider.

# 3.1.16 Release 11.0.0

#### • dSource linking support (API only)

The ability to create dSources for MSSQL (single instance and cluster), Oracle Staging Push, and MSSQL Staging Push has been added. In addition, dSource linking for older engine versions back to 6.0.7 is now supported.

#### Last Refresh column added to the VDB tab

A new column called Last Refresh has been added to the VDB tab, which shows the last refresh date/ time of a VDB.

• download.delphix.com<sup>35</sup> enhancements for container-based upgrades

Changes have been made to <u>download.delphix.com</u><sup>36</sup>, making it easier to build installation and upgrade automation for DCT using repository-management products like JFrog Artifactory.

- If you are installing DCT for the first time, please follow the standard installation documentation.
- If you have an existing installation of DCT you must take the following steps to perform upgrades:
  - Update the registry URL to the new address (http://dct.download.delphix.com) in the values.yaml file.
  - Update the credentials with the new permanent credentials in the values.yaml file.
  - If your organization leverages an allow (white) list, please update the list with the new repository URL(s).

# 3.1.17 Release 10.0.0

#### • dSource linking support (API only)

We have added the ability to create dSources for Oracle, ASE, and Postgres via API. This is currently available for Delphix Continuous Data Engines on version 8.0 and above. Future releases will include full support for all data sources and inclusion of older engine versions.

#### • Hyperscale Compliance UI (read-only)

DCT has released a Hyperscale UI under controlled availability. Please reach out to your account team to activate this feature. This enhancement includes the ability to:

- Register Hyperscale Orchestrators with DCT.
- Visualize Hyperscale infrastructure configuration parameters such as clusters of engines and mount points.
- Report on Hyperscale Jobs and Job executions, including near-realtime process feedback.

#### Compliance Job Executions report

For connected Continuous Compliance Engines, DCT now has a new report under DCT Insights that displays all recent job executions (including DCT initiated, engine initiated, and Hyperscale initiated jobs) as well as relevant compliance metrics.

#### Provisioning wizard enhancements

The DCT provisioning wizard now supports provisioning Oracle multi-instance (multi-tenant) and ASE VDBs.

Operations page

The DCT Operation page now includes initiator details, which provides visibility of what user/account initiated a job.

#### • Support for creating a bookmark at point-in-time

DCT now has the ability to create bookmarks on VDBs under a specified point-in-time via both API and UI. This feature is only compatible for databases that support LogSync and have it enabled.

35 http://download.delphix.com/

<sup>36</sup> http://download.delphix.com/

#### VDB lock/unlock

Users now have the ability to lock a VDB, preventing any sort VDB-based activity (refresh, start, stop, delete, and create bookmark).

#### $\cdot$ $\,$ Custom hook support in the DCT UI

Delphix users now have the ability to add custom hooks to a VDB at the time of provision (as part of the provision wizard UI) and update them under a VDB details page, so that they will execute during refresh operations.

# 3.1.18 Release 9.0.0

#### • Jenkins support

An official Jenkins plugin is now available for Data Control Tower, joining the existing ServiceNow and Terraform integrations. This plugin helps automate the use of data in your CI/CD pipelines and includes support for provisioning and destroying VDBs.

#### • DCT Toolkit

We've launched a new command line interface (CLI) offering, the DCT Toolkit. The DCT Toolkit allows for remote operation and control of Data Control Tower via your local terminal. Over time, this will replace the previously available DxToolkit.

#### Infrastructure wizard

The create infrastructure flow now supports adding Windows standalone and cluster hosts, as well as Linux cluster hosts. This is expanded from the previous flow that supported standalone Linux hosts. This differs from the workflow on the Continuous Data engine in that it represents a single place to create environment host connections for all connected Delphix engines.

#### Provisioning wizard

The data provisioning workflow now includes additional database types, including Oracle Single Instance Multi-tenant, Oracle Multiple Instance Single Tenant, and SQL Server Multiple Instance Single Tenant.

#### Operations dashboard improvements

Previously, all users could view all operations run by any user on the Operations page. Role-based access can now be provided to different users, showing only operations the user has access to. Simplified text is now used to define the Type column, as well as the Type and Engine Name in the details page.

#### Activity Audit Log Summary report

The Activity Audit Log Summary provides a high-level audit log summary capturing the utilization of DCT by displaying user activity and the historical count of actions executed within the platform.

#### Replication mappings

This feature helps users differentiate between replicated objects and original objects, in case of master and replicated engine, both are registered with DCT.

# 3.1.19 Release 8.0.0

#### Operations dashboard

Monitor and manage enterprise data activities in real time using a new central view. This provides

visibility to the current status across the full complement of Delphix transactions, including provision, refresh, teardown, and compliance jobs.

#### Provisioning wizard enhancements

The data provisioning wizard has been expanded to support additional types, including Oracle Single Instance Linked CDBs and Microsoft SQL Server Single Instance workflows. This will now allow you to provision more data types directly from Data Control Tower.

#### Advanced search tags support

The advanced search capabilities now support all user-generated tags. You can use personalized tags related to your unique business needs to refine your search results, such as team names or other specific data points.

# 3.1.20 Release 7.0.0

#### Provision VDB UI

Extending the Developer Experience capability in DCT, users can now provision single-tenant Oracle databases from the user interface using an intuitive wizard workflow.

#### Refresh VDB UI enhancements

The VDB list can now be opened in a searchable, paginated list selector from within a dialog by clicking the select button in the input. Additionally, refreshing a VDB by a bookmark is now available.

#### • VDB template import

Importing and removing imported VDB templates from connected engines is now an available action from the "VDB Config Templates" page.

• Environment details enhancements Managing cluster environment infrastructure has been made easier with the ability to edit host details directly from the page.

# 3.1.21 Release 6.0.0

#### • Developer Self-Service UI

Developers and admins now have the ability to centrally orchestrate common Continuous Data and developer operations from the DCT UI. This includes the ability to refresh, rewind, bookmark, and bookmark share (refresh to relative). This functionality also exposes the notion of **time flows** (non-active timelines), which is a critical tool for viewing past work on a VDB, such as the chronology of test results.

#### Central compliance orchestration

The compliance job UI now enables job orchestration and reporting. This includes Job Copy and Execute functions as well as a complete historical job execution log within each compliance job's details view.

#### • Bookmark UI

Developers and admins now have added visibility of bookmarks, both globally and contextualized, to individual VDBs. These visualizations are dual purpose; for administrators, these screens help with reporting and tagging on bookmarks, while for developers, these screens act as a catalog of actionable data references.

### • Global Bookmark List

View all bookmarks across your entire connected Delphix ecosystem. This screen will show bookmarks for both single VDBs and VDB groups.

### • VDB Bookmark List

See all bookmarks tied to this individual VDB. This is helpful for sharing bookmarks with team members who have a compatible VDB (same parent and provision point).

### Environment details page

Users can now orchestrate common environment actions via the DCT UI including enable, disable, environment refresh, and delete, as well as editing host details. Note, editing host details is only applicable to standalone environments at this time.

### Access visibility

Object detail pages will include an access tab that provides visibility to user access and the associated permissions for each user. This is a critical enabler for permissions visibility and auditing.

### Copy/delete functionality on role scopes

Scoped roles can now be copied and deleted within the DCT UI. This will enable easier administration, especially around the use of custom roles, as admins can now copy and modify new roles from templates.

### • External Postgres DB support

DCT now supports the use of an external Postgres database to house DCT metadata. Previously, DCT supplied and managed its own database, requiring persistent storage within the container platform.

## 3.1.22 Release 5.0.1

### 3.1.22.1 Enhancements

### Data scoped Access Group

### Enhancement in roles

Associated permissions in roles are changed from 'string' type to 'permission object' type. For details, see the Role schema in the API References (see page 402).

### Custom roles

In addition to the 5 pre-seeded fixed roles (Admin, Monitoring, DevOps, Masking, and Owner), DCT provides flexibility to create new custom roles as per user need. Users (Accounts) can create new custom roles by encapsulating any combination of permissions. The custom roles can be configured through a UI configuration screen (screenshot below), in addition to a set of APIs to manage roles. For details, see the API References (see page 402).

### • Updates to existing RBAC model

For better usability and allow to set more granular permissions there are following enhancements in the RBAC model:

- Renamed Access Group "Policy" to Access Group "Scope"
- Renamed the following APIs related to Access Group actions

- <u>Add scope</u> to an Access Group
   POST: /access-groups/{accessGroupId}/policies → POST /access-groups/{accessGroupId}/scopes
- <u>Remove scope</u> from Access Group
   DELETE /access-groups/{accessGroupId}/policies/{policyId} →
   DELETE /access-groups/{accessGroupId}/scopes/{scopeId}
- <u>Get</u> Access Group scope
   GET /access-groups/{accessGroupId}/policies/{policyId} → GET /
   access-groups/{accessGroupId}/scopes/{scopeId}
- Update Access Group scope
   PATCH /access-groups/{accessGroupId}/policies/{policyId} →
   PATCH /access-groups/{accessGroupId}/scopes/{scopeId}
- Add object tags to Access Group scope
   POST /access-groups/{accessGroupId}/policies/{policyId}/object-tags → POST /access-groups/{accessGroupId}/scopes/{scopeId}/
   object-tags
- <u>Remove object tags</u> from Access Group scope
   POST /access-groups/{accessGroupId}/policies/{policyId}/object-tags/delete → POST /access-groups/{accessGroupId}/scopes/ {scopeId}/object-tags/delete
- Add objects to Access Group scope
   POST /access-groups/{accessGroupId}/policies/{policyId}/objects
   → POST /access-groups/{accessGroupId}/scopes/{scopeId}/objects
- <u>Remove objects</u> from Access Groups scope
   POST /access-groups/{accessGroupId}/policies/{policyId}/
   objects/delete → POST /access-groups/{accessGroupId}/scopes/
   {scopeId}/objects/delete

### Renamed the "everything" flag to "scope\_type"

In order to make it more understandable, we have renamed the everything flag to scope\_type. There are three possible values for scope\_type i.e. SIMPLE, SCOPED and ADVANCED. The value SIMPLE corresponds to everything=true and SCOPED corresponds to everything=false. The value ADVANCED for scope\_type is new enhancement to setting permissions which allows users to set permissions (e.g. READ, DELETE) for an object. There is more information about ADVANCED scope in next section.

### Access Group Scope: Advanced scope type

In Add objects to access group scope API, now user can define permissions level checks as well for an object. For example, earlier when object\_id and and object\_type are provided in

request payload, all permissions that are defined in scope are applied to this object. But now user can define specific permissions.

- Masking jobs
  - CRUD APIs, COPY, Connectors CRUD
- Masking job execution
  - Connector Credentials
  - Execution API

### 3.1.22.2 Custom roles

- Accounts can create new instances of role encapsulating any combination of permission.
- Role name must be unique.
- Custom roles can be updated. Accounts can add or remove permissions to/from the custom roles.
- Custom roles can be deleted. (If they are not associated with any Access Group).

### 3.1.23 Release 4.0

- Environment Overview List
- Un-virtualized Source Sizing Report
- Global VDB Templates
- Scoped Access Control
- LDAP/AD and SAML/SSO Configuration UI

### 3.1.24 Release 3.0

- Cluster Node (RAC) management APIs
- Ability to disable username/password authentication globally
- LDAP/Active Directory groups
- CDBs/vCDBs APIs
- VDB Provisioning / update for EDSI (AppData) platforms
- Engine registration wizard
- Access Groups Management UI
- Compliance Engine Management

## 3.1.25 Release 2.2

### 3.1.25.1 Deployment

Introducing Kubernetes and OpenShift support

## 3.1.25.2 APIs

- Registration of Continuous Compliance Engines
- Masking Connectors
- "Move Masking Job"
- Masking of mainframe objects
- Provisioning enhancements for Oracle multi-tenant and RAC
- LDAP/Active Directory authentication
- Password management
- Initial access management by Permissions, Roles, Policies, and Access Groups (permissions applied to all objects of a type e.g. Stop VDB permission on all VDBs)
- Distributed tracing and logging (Trace ID propagated down call stack)
- Bulk delete of tags

## 3.1.25.3 UI

- Continuous Data
  - Added tag support to the Infrastructure page
  - New dSources page
  - New VDBs page
- Insights
  - Added an export behavior to the Storage Summary report
  - New dSource Inventory report
  - New VDB Inventory report
- Admin
  - New Accounts page

# 3.2 Fixed issues

## 3.2.1 Release 21.0.0 changes

Bug Number	Description
APIGW-9536	Reduced memory requirement to collect rule sets from connected compliance engines.

# 3.2.2 Release 20.0.0 changes

Bug Number	Description	
APIGW-8504	Resolved an issue where masking job execution sometimes failed due to concurrent updates.	

# 3.2.3 Release 18.0.0 changes

Bug Number	Description
APIGW-8771	Fixed a memory leak, where the virtualization-app was restarting frequently. The reason for the memory leak was a background bookmark migration job for timestamp if the number of bookmarks are more than 100.

# 3.2.4 Release 17.0.0 changes

Bug Number	Description	
APIGW-8156	Fixed a timeout issue when creating a bookmark for a large vDB group.	

# 3.2.5 Security fixes

Bug Number	Bug Introduced in	Description	Security bulletin
APIGW-8057, APIGW-8113, APIGW-8114, APIGW-8142	8.0.0	Arbitrary code execution can be performed by any user permitted to log into the Delphix Data Control Tower (DCT) application, even without admin permissions.	TB118

# 3.2.6 Release 16.0.1 changes

Bug Number	Description	
APIGW-8144	Fixed an issue that masking jobs of a registered engine are not shown in DCT.	

# 3.2.7 Release 16.0.0 changes

Bug Number	Description
APIGW-7480	Fixed the UI on the Infrastructure Connections screen such that long environment names will wrap around instead of spilling unto the next column.

# 3.2.8 Release 14.0.0 changes

Bug Number	Description
APIGW-7090	Fixed an issue where the username was not displayed in the top navigation bar, if logging in using anything other than username/password.

# 3.2.9 Release 13.0.0 changes

Bug Number	Description
APIGW-4971	Fixed a problem when VDB_GROUP_REFRESH job's update time did not get updated on receiving job updates for the underlying VDB_REFRESH jobs.
APIGW-6705	Fixed an installation problem when masking database migration runs out of memory for large tables.

# 3.2.10 Release 12.0.0 changes

Bug Number	Description
APIGW-6240 APIGW-6241	Fixed a memory exhaustion issue that caused frequent HTTP 500 errors.
APIGW-5052	Fixed an issue when viewing the Summary screen after provisioning a vDB in DCT where the dSource summary name was showing the vDB name.
APIGW-5511	Added the ability to unregister engines in the UI.
APIGW-5585	Fixed an issue where users were unable to logout following SSO token expiration.

# 3.2.11 Release 10.0.1 changes

Bug Number	Description
APIGW-5406	Fixed an issue where the VDBGroup update API gives an internal error if vdb_ids are the same as ones already present in VDBGroup.
APIGW-5419	Fixed an issue where the VDBGroup delete API gives a 404 error if underlying VDBs are already deleted or not present.
APIGW-5418, APIGW-5517	Fixed an issue where VDB provisioning via DCT GUI fails with, "There was an error trying to process your request."
APIGW-5570	Fixed an issue preventing the link of a Postgres database as a dSource.
APIGW-5571	Fixed an issue where the Provision VDB -> dSource Listing would not show more than 25 items.
APIGW-5574	Hyperscale datasets tables-or-files list and search APIs now return all instead of filtering by dataset.

APIGW-5578	Fixed an issue where Pagination was not working for some of the pages in a testing environment.
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# 3.2.12 Release 10.0.0 changes

Bug Number	Description
APIGW-3931	Fixed an error found when loading the LDAP config page in the UI, if the LDAP config domains have empty values.
APIGW-3961	Fixed the issue where the Environment link to the dSource detail view is broken.
APIGW-4270	Cleaned up pending jobs left by deleted engines.
APIGW-5056	Addressed VDB provisioning failures where there were a lot of concurrent requests.

# 3.2.13 Release 9.0.0 changes

Bug Number	Description
APIGW-3772	Replicated VDBs/dSources are now identified in the Provisioning wizard.
APIGW-3931	Fixed a null pointer exception during LDAP configuration without a domain.
APIGW-3979	Fixed an issue where the Import VDB Configuration templates dialog was showing the engine ID in error messages. It is now changed to show engine names.
APIGW-3983	Fixed an issue where a new masking job could not be started from DCT when the previous job was cancelled on the masking engine.
APIGW-4009	Fixed an issue where the first and last name will be cleared if incorrect names were entered for SSO.
APIGW-4010	Fixed an issue in the UI where first and last name attributes cannot be reset.

# 3.2.14 Release 8.0.1 changes

Bug Number	Description
APIGW-4324	Fixed an issue where users who upgraded to DCT 8.0.0 were not able to interact with the UI or connect to the GraphQL service container.
APIGW-4317	Fixed an issue where an error would occur when searching for a VDB in the relative refresh UI.

# 3.2.15 Release 8.0.0 changes

Bug Number	Description
APIGW-3764	Removed THE requirement on setting credentials if a masking job execution happens on the origin engine.
APIGW-3771	Allows the policy name to be empty when provisioning a VDB.
APIGW-3783	Allows for an existing ImagePullSecret to be provided to to pull docker images.
APIGW-3985	Fixed the "VDB Container is part of a container" error while refreshing from bookmark directly on the VDB > Bookmark tab.
APIGW-3990	Fixed the broken view for a bookmark that has multiple VDBs on the Data > Bookmark tab.

# 3.2.16 Release 7.0.1 changes

Bug Number	Description
APIGW-3592, APIGW-3594	Previously, a non-admin user that was granted access to a VDB, but not its environment, would get an error accessing the VDB overview. A fix has been implemented to show that the access error is with the environment and not the VDB.

Bug Number	Description
APIGW-3775	Fixed an issue where refreshing from the bookmark wizard was not showing compatible bookmarks.
APIGW-3831	Fixed a certificates import failure if the truststore is on OpenShift.

# 3.2.17 Release 6.0.1 changes

Bug Number	Description
APIGW-3460	Fixed a request timeout issue.
APIGW-3395	Fixed an issue where the refresh wizard did not update snapshots when selecting different datasets.

# 3.2.18 Release 6.0.0 changes

Bug Number	Description
APIGW-3223	Fixed an issue where DCT failed to get info from detached dSources.

# 3.2.19 Release 5.0.3 changes

Bug Number	Description
APIGW-3344	Fixed an issue causing provision failure from RAC dSource to non-RAC target.

# 3.2.20 Release 5.0.2 changes

Bug Number	Description
APIGW-2979	VDB refresh will no longer fail if the refresh target name is not unique.

Bug Number	Description
APIGW-2981	Fixed an issue where all the Compliance jobs and source jobs on the engine will be deleted when a Compliance engine is unregistered.

## 3.2.21 Release 5.0.1 changes

Bug Number	Description
APIGW-2463	The default docker-compose.yaml file is now provided with log size and rotation configured for all containers.
APIGW-2735	Fixed an issue where DCT migration failed with "could not create unique index environments_host_pkey".
APIGW-2828	Helm chart now allows cronjob resource limits to be set via the values.yaml.

## 3.2.22 Release 3.0.0 changes

Bug Number	Description
APIGW-1785	Fixed an issue where Nginx sometimes failed to start after a server restart.

# 3.3 Supported versions and upgrade matrix

Data Control Tower has minimum engine versions that are actively tested against to ensure optimal interoperability. Please ensure that all connected engines meet the version requirements:

Delphix Engine	Version
Continuous Data	6.0.8.0 or higher
Continuous Compliance	6.0.13.0 or higher

Users can upgrade directly between DCT versions without needing an interim step (i.e., upgrading to a median version before upgrading to the latest). In this table, x represents the patch release number.

Version	Release date	Can upgrade to
2.0.0	Jun 27th, 2022	2.1.0 - 2025.1.0.x
2.1.0	Sep 8th, 2022	2.2.0 - 2025.1.0.x
2.2.0	Oct 17th, 2022	3.0.0 - 2025.1.0.x
3.0.0	Dec 15th, 2022	4.0.0 - 2025.1.0.x
4.0.0	Jan 19th, 2023	5.0.0 - 2025.1.0.x
5.0.x	Feb 16th, 2023	6.0.0 - 2025.1.0.x
6.0.x	Mar 29th, 2023	7.0.0 - 2025.1.0.x
7.0.x	May 9th, 2023	8.0.0 - 2025.1.0.x
8.0.x	Jun 22nd, 2023	9.0.x - 2025.1.0.x
9.0.x	Aug 1st, 2023	10.0.x - 2025.1.0.x
10.0.x	Sep 13th, 2023	11.0.x - 2025.1.0.x
11.0.x	Oct 23rd, 2023	12.0.x - 2025.1.0.x
12.0.x	Nov 30th, 2023	13.0.x - 2025.1.0.x
13.0.x	Jan 24th, 2024	14.0.x - 2025.1.0.x
14.0.x	Feb 21st, 2024	15.0.x - 2025.1.0.x
15.0.x	Mar 20th, 2024	16.0.x - 2025.1.0.x
16.0.x	Apr 17th, 2024	17.0.x - 2025.1.0.x
17.0.x	May 22nd, 2024	18.0.x - 2025.1.0.x

Version	Release date	Can upgrade to
18.0.x	Jun 19th, 2024	19.0.x - 2025.1.0.x
19.0.x	Jul 17th, 2024	20.0.x - 2025.1.0.x
20.0.x	Aug 5th, 2024	20.0.x - 2025.1.0.x
21.0.x	Sep 3rd, 2024	21.0.x - 2025.1.0.x
22.0.x	Sep 30th, 2024	22.0.x - 2025.1.0.x
23.0.x	Oct 28th, 2024	23.0.x - 2025.1.0.x
24.0.x	Nov 25th, 2024	2025.1.0.x
2025.1.0.x	Jan 21st, 2024	N/A

# 3.4 Deprecated and end-of-life

## 3.4.1 Release 19.0.0

## 3.4.1.1 Deprecation notice

 The masking job copy operation (accessible from the Compliance Jobs > Overview actions menu in the DCT UI), and the /masking-jobs/{maskingJobId}/migrate and /masking-jobs/ {maskingJobId}/copy API endpoints in the MaskingJobs category, will be deprecated from DCT effective with the release of version 20.0.0.

## 3.4.2 Release 13.0.0

## 3.4.2.1 Deprecation notice

• DCT support for Docker Compose is now deprecated with the release of DCT version 13.0.0 (January 2024). This begins a 12-month depreciation period for all supported versions on Docker Compose. All

prior and current product versions on Docker Compose will have continued support until January 2025. Production DCT workloads in Docker Compose are not supported.

• It is highly recommended that new DCT installations are performed on Kubernetes<sup>37</sup> or OpenShift<sup>38</sup>.

<sup>37</sup> https://dct.delphix.com/docs/latest/installation-and-setup-for-kubernetes 38 https://dct.delphix.com/docs/latest/installation-and-setup-for-openshift

# 4 DCT overview

# 4.1 License overview

Data Control Tower has three tiers that determine available functionality and enabled use-cases via the DCT UI and API. They are **Core**, **Self Service**, and **Enterprise**, described in detail below.

# Data Control Tower License Tiers



### **DCT Enterprise**

The full-featured, premium tier designed for large, complex Delphix deployments that require comprehensive data management capabilities. This tier includes the entire suite of DCT features, supporting unlimited engine connections and providing robust automation and control.

### **DCT for Self Service**

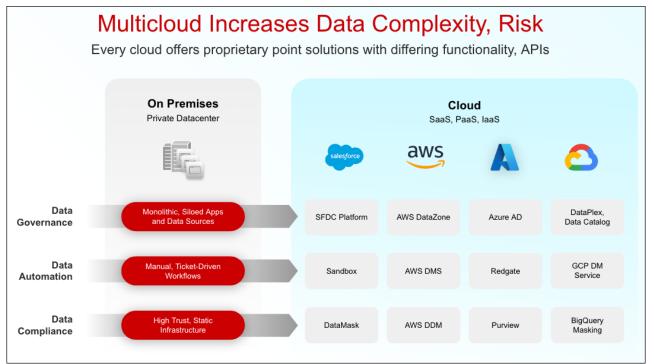
Intended for Continuous Data-focused organizations that emphasize advanced developer workflows. This tier supports unlimited Continuous Data connections and delivers core DCT features alongside selected automation tools to enhance productivity.

### **DCT Core**

Available to any customer with an active Continuous Data or Compliance engine license. This tier provides an entry-level experience aimed at smaller Delphix deployments or new users looking to explore DCT's capabilities. This tier includes a limited feature set with a maximum of two Continuous Data (CD) connections and one Continuous Compliance (CC) connection, offering an accessible way to start managing data with DCT. Engines dedicated to Hyperscale Compliance workflows will not be counted toward the engine quota under a license.

# 4.2 Product overview

Today's application and data landscape is an increasingly complex ecosystem of hosting architectures, often represented by a multi-cloud landscape coupled with an explosion of different platforms and services. This fragmented picture of heterogeneous silos makes data governance, automation, and compliance a herculean, if not, an impossible task.



Data Control Tower (DCT) is an enabling Delphix platform that introduces a data mesh to centralize data management, automation, and compliance across all applications and cloud platforms.

Central data management is achieved through operational control and visibility of test data across multicloud applications, databases, environments, and releases. DCT brings data cataloging, tagging, and data access controls for central governance of all enterprise data, while providing the right data at the right time to development teams.

Data automation at CI/CD speed and enterprise scale is easier and more powerful, by combining **DCT with Continuous Data**. A unified API gateway, self-service automation tools, and plug-and-play DevOps integrations streamline the initial configuration and day-to-day workflows.

**DCT with Continuous Compliance** provides robust data compliance in lower environments, all while reducing costs and enabling fast, quality software development.

# 4.3 Getting started

## 4.3.1 Selecting a license

Navigate to the **Admin** tab, then select the **License** section on the left side. The UI will show restrictions for each license tier, the currently selected tier (DCT Enterprise, in this example), and the current engine counts.

CONTROL TOWER	Home Data Compliance Insights <u>Admin</u>	٢	Bootstrap Admin d7cfdd53-f7ce-4037-b124-2c37d72d1990 😫
Accounts	License		
Access Groups			
Roles	Number of Data Engines	Nun	ber of Compliance Engines •
Authentication	0/∞		0/∞
License			
Operations	Start with DCT Core	DCT for Self Service	DCT Enterprise
	State UP Concerned War Fee Gateway to Data Management <ol> <li>Sangines Included: 2 for Continuous Data, 1 for compliance UI: Manage compliance easily.</li> <li>Guera Access: Attribute-based management.</li> <li>Guera Access: Taste of advanced features.</li> <li>Thinted Premium Access: Taste of advanced features.</li> <li>Change License</li> </ol>	Scale Your Data Operations  Antimited Continuous Data Engines: Break free from Initis with endless data processing power.  Single Compliance Engine: Maintain regulator; Indenced Features: All DCT Core benefits plus full access to Self Service UX, APIs, DCT Toolkit, and pre- built DevOps integrations.  Choose DCT for Self Service to elevate your dat management, giving you the tools to grow without constraints.  Change License	Unterprise Unterprise Display Linkis: Complete freedom with all engines for any scale. • Advanced Capabilities: Data governance, multi-engine worknow orchestration, and more. • Bierer Louded: Everything from Self-Service, with unrestricted use and no double dipping. Select DCT Enterprise for an all-encompassing data solution that matches your ambition. Scale, innovate, and govern with the ultimate in data management.

## 4.3.2 Installing DCT 23.0.0 and beyond

DCT licenses will be defaulted to DCT Core at the time of installation. Once installed, administrators will be able to update their license by accessing the **License** section (under the **Admin** tab) and selecting DCT for Self Service or Enterprise.

## 4.3.3 Upgrading from DCT 22.0.0 and below

Users looking to upgrade to DCT 23.0.0 or later versions will now have to select their license post-upgrade. Once the upgrade is complete, DCT will default to DCT Enterprise to assure no functionality is lost. Users entitled to a lower tier of DCT must perform a license downgrade, which can be performed in the **License** section (under the **Admin** tab)

Downgrades will be blocked if prerequisites (e.g., DCT has more than the number of allowed engine connections for that license tier) are not met. This is to prevent loss of data as disconnecting an engine will remove the metadata associated with that engine.

## 4.3.4 Changing licenses

Upgrade the license tier via the UI (always possible).

CONTROL TOWER	Home Data Compliance Insights	Admin	Bootstrap Admin d7cfdd53-f7ce-4037-b124-2c37d72d1990
Accounts	License	Change License ×	
Access Groups			-
Roles	Number	You are upgrading the DCT experience that requires a different license. Please ensure that this new license matches the DCT entitlement in your active Delphix contract. Would you like to proceed?	Number of Compliance Engines •
Authentication			0/1
License		Cancel Upgrade	
Operations		Cancer	
	Start with DCT Core Your Free Gateway to Data Managemen	t Scale Your Data Operations	DCT Enterprise Unleash Your Data's Full Potential
	3 Engines Included: 2 for Continue Compliance.     Compliance UI: Manage complian Secure Access: Attribute-based m Usage Tracking: Monitor with Pho Metering.     Limited Premium Access: Taste of Choose DCT Core for a no-cost entry int management. Select this tier to build yo from the ground up.	e easily. anagement. ne Home & f advanced features. b robust data Choose DCT for Self Service to elevate your data	for any scale. • Advanced Capabilities: Data governance, multi-engine workflow orchestration, and more. • All Features Included: Everything from Self-Service,
	⊘ Your License	Change License	Change License

Downgrading the license tier via the UI (only possible if the engine count restriction is satisfied for the target tier).

Accounts	License	Change License ×	
Access Groups	-		
Roles	Number	You have selected to downgrade your current DCT experience, this will potentially limit the number of active engine connections that you have connected to DCT as well as certain advanced functionality tied to different	mber of Compliance Engines •
Authentication		tiers of DCT. Are you sure you would like to proceed?	0/1
License			
Operations		Cancel Downgrade	
	Start with DCT Core Your Free Gateway to Data Management	DCT for Self Service Scale Your Data Operations	DCT Enterprise Unleash Your Data's Full Potential
	3 Engines Included: 2 for Continuou Compliance.     Compliance UI: Manage complianc Secure Access: Attribute-based ma Usage Tracking: Monitor with Phon Metering.     Limited Premium Access: Taste of Choose DCT Core for a no-cost entry into management. Select this tier to build you from the ground up.	e easily. agement. a Home & Single Compliance Engine: Maintain regulatory compliance with ease. a Home & Enhanced Features: All DCT Core benefits plus full access to Self Service UX, APIs, DCT Toolkit, and pre- built DevOps integrations. robust data Choose DCT for Self Service to elevate your data	<ul> <li>No Engine Limits: Complete freedom with all engines for any scale.</li> <li>Advanced Capabilities: Data governance, multi-engine workflow orchestration, and more.</li> <li>All Features included: Everything from Self-Service, with unrestricted use and no double dipping.</li> <li>Select DCT Enterprise for an all-encompassing data solution that matches your ambition. Scale, innovate, and govern with the ultimate in data management.</li> </ul>
	Change License	⊘ Your License	Change License

## 4.3.5 Planning your deployment

Data Control Tower (DCT) represents a Delphix-wide control plane. It simultaneously powers data governance, automation, and compliance workflows to enable the efficient operation of a broad, complex Delphix deployment at scale. In order to deliver scalability, service-level performance tuning, and robust

resiliency, DCT leverages container technology to deliver a bespoke experience for administrative teams based on their own internal guidelines.

For Kubernetes, OpenShift, and Docker Compose deployments
 Before starting a DCT deployment, please contact your enterprise IT organization to determine
 what container platforms, configurations, and policies apply for container-hosted applications. It
 is helpful to include a container administrator as part of the DCT install process.

 For virtual appliance (OVA image) deployments
 The above note is not applicable. If you deploy via OVA image, you will need to choose a
 hypervisor with similar configurations found here<sup>39</sup>.

## 4.3.6 Container platform support

Data Control Tower (DCT) supports deployment methods for Kubernetes, OpenShift, and via virtual appliance (OVA image). If you do not see a platform of choice, please reach out to your account team for more details.

DCT is designed to run and is supported on any Certified Kubernetes platform<sup>40</sup> that supports Helm<sup>41</sup>. The product is also OCI-compliant and may use any container runtime within a certified Kubernetes platform that implements the OCI Runtime Specification including CRI-O, Docker, and Podman.

Delphix regularly tests against a range of popular Kubernetes platforms with the goal of covering a representative sample of implementations. The following Kubernetes platforms have been explicitly tested by Delphix and are recommended for use: MicroK8s, AWS EKS, Azure AKS, and OpenShift on VMWare vSphere.

### 4.3.6.1 Kubernetes

A

DCT currently supports all popular deployment models of Kubernetes as long as the service runs a minimum of Kubernetes 1.25 and above. This includes Amazon Elastic Kubernetes Service (Amazon EKS), Azure Kubernetes Service (AKS), and beyond.

<sup>39</sup> https://cd.delphix.com/docs/latest/checklist-of-information-required-for-installation

<sup>40</sup> https://www.cncf.io/certification/software-conformance

<sup>41</sup> https://helm.sh/docs/topics/kubernetes\_distros/

## 4.3.6.2 OpenShift

DCT also supports all popular deployment models of OpenShift as long as the service runs a minimum version of 4.12 or above. This includes Red Hat OpenShift on IBM Cloud and any other cloud provider's service.

## 4.3.6.3 Virtual appliance (OVA image)

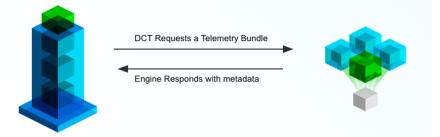
DCT now offers a virtual machine deployment method (distributed as a closed appliance OVA image) similar to standard Continuous Data and Compliance engine deployments.

## 4.3.7 Data Control Tower deployment architecture

Whether an organization wants to deploy a Data Control Tower (DCT) per business unit (organizational silos), per network (datacenter-specific DCT), or globally (**the most common option**), DCT can adapt to many deployment scenarios.

Delphix recommends to deploy a single, global DCT for all Delphix Engines, for the purposes of achieving a single control plane and data governance solution.

DCT-based communication is lightweight, requiring simple commands or a small telemetry payload to facilitate most workflows. The below graphic demonstrates this style of communication:



DCT simply logs into the engines as a user would and leverages engine APIs to perform commands or extract metadata.

DCT requires HTTP/HTTPS to facilitate communication with engines and requires ports 80/443 to reach engines in other networks.

DCT does not directly interface with business-critical databases, it will only communicate with engines to perform operations and inquire about system statuses. The Delphix Engine, which is generally co-located with your data, does all the heavy lifting.

## 4.3.8 Plan your tagging strategy

DCT tags serve as the Delphix-wide business metadata system. These **Key:Value** pairs can be applied to any object and used for search and filter in virtually every DCT workflow, from automation to administration, all the way to access control.

It is paramount to develop a tagging strategy prior to deployment in order to develop a scalable metadata solution.

Some examples of popular tagging strategies:

=

Theme	Sub-topics	Tag (Key:Value) example
Owner	Application, Business, Project, Team (scrum, QA,)	(Owner: Finance App), (Owner: AppTeam Alpha), (Owner: John Doe),
Application		(Application: Alpha)
Environment		(Environment: Non Production)
Location	Data Center, Region, Name, Cloud	(Geo: West Coast), (Data Center: Azure WC),

In addition to designing which tags to implement, please consider who will have access to creating tags (i.e. developer vs admin-only, etc.), which will impact how teams are able to collaborate with one another.

Also, Delphix recommends that the DCT administrative team creates Delphix-wide documentation on these tagging standards to reduce the risk of deviation.

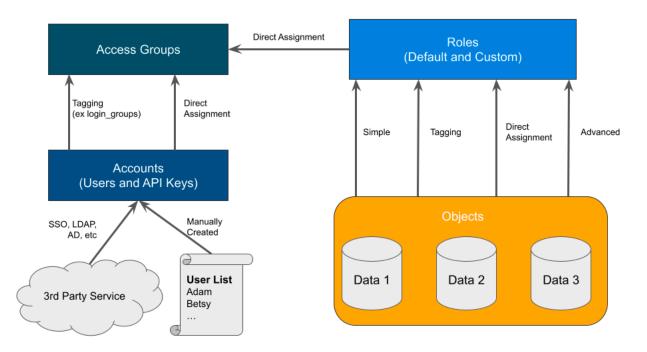
### 4.3.9 Plan your Access Control strategy

DCT implements a model found in other types of software called **Attribute Based Access Control** (ABAC). This model is incredibly flexible, but requires detailed configurations to perfect your use cases. In DCT's

model, there are four entity types (defined below). Familiarize with each entity, as they are the foundational blocks of DCT's ABAC model.

Entity	Description	Managed by
Accounts (aka Users)	A single or shared user who can authenticate with DCT (UI or API).	Create manually or via Identity Provider (IdP), such as SSO or LDAP. Accounts are independent of Delphix Engines.
Access Groups	A collection of accounts that share one or more characteristics, such as a Team or Permission set. Equivalent to an Active Directory group.	Manually created. Populated manually or via the login_groups tag.
Roles and Permissions	The collection of read, write, and delete permissions forms a reusable, named role.	Some roles are provided out of the box, but Admins can build their own from the available permissions. Individual permissions are immutable.
Objects	Units, such as VDBs, Bookmarks, and Environments, that are managed across the Delphix Platform.	Automatically identified by DCT from the connected engines. Assigned to Roles via various models. The CD and CC Engines supply these objects.

Each entity is linked to another through manual or automated assignment. A manual (or direct) assignment is a good approach for early implementations, however, that can be challenging to maintain as teams grow. As an alternative, tagging is recommended to perform automatic assignments based on your custom configuration. The below diagram shows how each entity is linked together. The directions below start with **Accounts creation** to **Access Groups** with **Role assignments**, and finish with **Object mappings**.



Understanding your team structure is imperative to identify the best access model. Usually, organizations have existing groupings defined in their Identify Provider (IdP). These groups are typically organized in one of two ways:

- A team dedicated towards a central goal (such as a Product Development team).
- A group of individuals with similar permissions (such as Security Administrators).

Understanding the purpose of each group should be a guide in how the Roles and Permissions are designed. For example, the Alpha product development team might have full permission to manage existing VDBs and create new bookmarks for their team's "Alpha" objects. On the other hand, Security Admins might have sweeping read and disable access across the entire platform to ensure compliancy. Iterating through each Access Group and designing custom, but re-useable roles, based on the Principle of Least Privilege<sup>42</sup>, will produce a streamlined rollout.

# 4.4 DCT licensing

Data Control Tower has three tiers that determine available functionality and enabled use-cases via the DCT UI and API. They are **Core**, **Self Service**, and **Enterprise**, described in detail below.

<sup>42</sup> https://en.wikipedia.org/wiki/Principle\_of\_least\_privilege

# **Data Control Tower License Tiers**

<b>AT</b>	CO	
		1242
		4

INCLUDED WITH:

**Continuous Data and Compliance** 

1 Continuous Compliance Engine

Ul for Continuous Data, Continuous

2 Continuous Data Engines

Compliance, and Hyperscale

Global User Access Management

Self Service with APIs and DCT

Compliance

Tag Management

Toolkit

### DCT SELF SERVICE

#### Scale your Data Operations

- Unlimited Continuous Data Engines
- 1 Continuous Compliance EngineUl for Continuous Data, Continuous
- Compliance, and Hyperscale Compliance
- Global User Access Management
   Tag Management
- Advanced Self Service including APIs, DCT Toolkit, VDB Groups, and Bookmarks
- Prebuilt DevOps Integrations

### **DCT ENTERPRISE**

Unleash your Data's Full Potential

- Unlimited Continuous Data Engines
- Unlimited Continuous Compliance
- EnginesUl for Continuous Data, Continuou
- Compliance, and Hyperscale Compliance
- Global User Access Management
- Tag Management
- Advanced Self Service including APIs, DCT Toolkit, VDB Groups, and Bookmarks
- Prebuilt DevOps Integrations
- Advanced Multi-Engine Workflows

### **DCT Enterprise**

The full-featured, premium tier designed for large, complex Delphix deployments that require comprehensive data management capabilities. This tier includes the entire suite of DCT features, supporting unlimited engine connections and providing robust automation and control.

### **DCT for Self Service**

Intended for Continuous Data-focused organizations that emphasize advanced developer workflows. This tier supports unlimited Continuous Data connections and delivers core DCT features alongside selected automation tools to enhance productivity.

### DCT Core

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Available to any customer with an active Continuous Data or Compliance engine license. This tier provides an entry-level experience aimed at smaller Delphix deployments or new users looking to explore DCT's capabilities. This tier includes a limited feature set with a maximum of two Continuous Data (CD) connections and one Continuous Compliance (CC) connection, offering an accessible way to start managing data with DCT.

Engines dedicated to Hyperscale Compliance workflows will not be counted toward the engine quota under a license.

Navigate to the **Admin** tab, then select the **License** section on the left side. The UI will show restrictions for each license tier, the currently selected tier (DCT Enterprise, in this example), and the current engine counts.

CONTROL TOWER	Home Data Compliance Insights <u>Admin</u>	(	Bootstrap Admin d7cfdd53-f7ce-4037-b124-2c37d72d1990	
Accounts	License			
Access Groups				
toles	Number of Data Engines	; N	umber of Compliance Engines •	
Authentication	0/∞		0/∞	
icense				
perations				
	Start with DCT Core Your Free Gateway to Data Management	DCT for Self Service Scale Your Data Operations	DCT Enterprise Unleash Your Data's Full Potential	
	<ul> <li>3 Engines Included: 2 for Continuous Data, 1 for Compliance.</li> <li>Compliance UE: Manage compliance easily.</li> <li>Secure Access: Attribute-based management.</li> <li>Usage Tracking: Monitor with Phone Home &amp; Metering.</li> <li>Limited Premium Access: Taste of advanced features.</li> <li>Choose DCT Core for a no-cost entry into robust data management. Select this tier to build your data strategy from the ground up.</li> </ul>	Unlimited Continuous Data Engines: Break free from limits with endless data processing power.     Single Compliance Engine: Maintain regulatory compliance with ease.     Enhanced Features: All DCT Core benefits plus full access to Self Service UX, APIs, DCT Toolkit, and pre- built DevOps integrations. Choose DCT for Self Service to elevate your data management, giving you the tools to grow without constraints.	No Engine Limits: Complete freedom with all engines for any scale.     Advanced Capabilities: Data governance, multi-engine workflow orchestration, and more.     All Features Included: Everything from Self-Service, with unrestricted use and no double dipping.     Select DCT Enterprise for an all-encompassing data solution that matches your ambition. Scale, innovate, and govern with the ultimate in data management.	
	Change License	Change License	⊘ Your License	

## 4.4.1 Installing DCT 23.0.0 and beyond

DCT licenses will be defaulted to DCT Core at the time of installation. Once installed, administrators will be able to update their license by accessing the **License** section (under the **Admin** tab) and selecting DCT for Self Service or Enterprise.

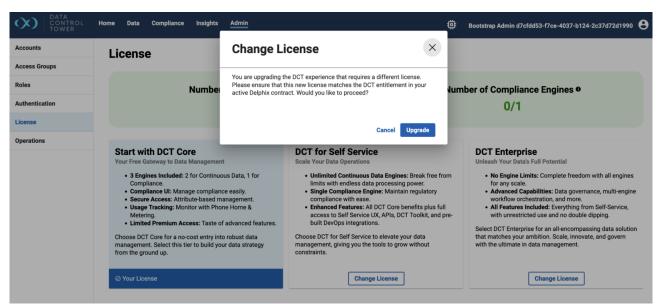
## 4.4.2 Upgrading from DCT 22.0.0 and below

Users looking to upgrade to DCT 23.0.0 or later versions will now have to select their license post-upgrade. Once the upgrade is complete, DCT will default to DCT Enterprise to assure no functionality is lost. Users entitled to a lower tier of DCT must perform a license downgrade, which can be performed in the **License** section (under the **Admin** tab)

Downgrades will be blocked if prerequisites (e.g., DCT has more than the number of allowed engine connections for that license tier) are not met. This is to prevent loss of data as disconnecting an engine will remove the metadata associated with that engine.

### 4.4.3 Changing licenses

Upgrade the license tier via the UI (always possible).



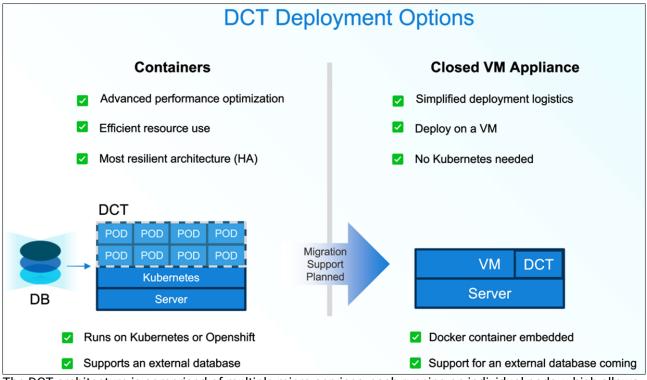
Downgrading the license tier via the UI (only possible if the engine count restriction is satisfied for the target tier).

CONTROL TOWER	Home Data Compliance Insights	Admin st	Bootstrap Admin d7cfdd53-f7ce-4037-b124-2c37d72d1990 😝
Accounts	License	Change License ×	
Access Groups	-		
Roles	Number	You have selected to downgrade your current DCT experience, this will potentially limit the number of active engine connections that you have connected to DCT as well as certain advanced functionality tied to different	umber of Compliance Engines •
Authentication		tiers of DCT. Are you sure you would like to proceed?	0/1
License			
Operations		Cancel Downgrade	
	Start with DCT Coce For the start way to bata Management a fangian Included: 2 for Continuou compliance Bungliance UI: Manage compliance Beare Aceksis: Attribute-based management Beare Tacking: Monitor with Phon Management. Select this ter to build you Stantage Core for an occus entry into management. Select this ter to build you Change License	e easily. agement. a Home & Enhanced Features: All DCT Core benefits plus full access to Self Service UX, APIs, DCT Toolkit, and pre built DevOps Integrations. robust data Choose DCT for Self Service to elevate your data	<ul> <li>for any scale.</li> <li>Advanced Capabilities: Data governance, multi-engine workflow orchestration, and more.</li> <li>All Features Included: Everything from Self-Service,</li> </ul>

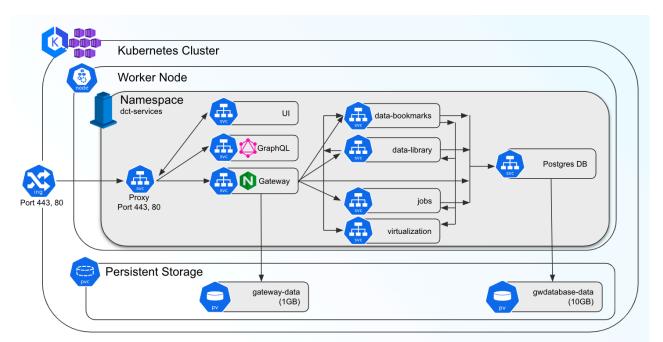
# 5 Deployment methods and architecture

The articles in this section will explain all of the required steps to deploy DCT on your container platform of choice. This page offers an overview of deployment methods and architecture.

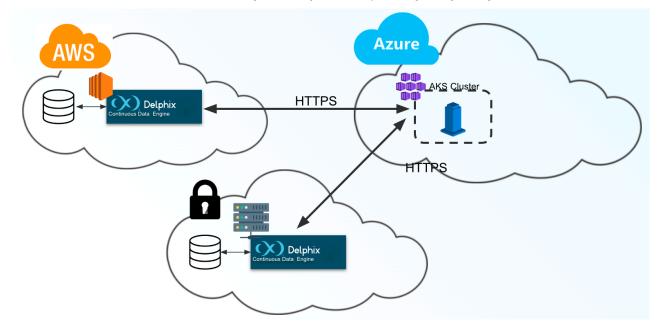
Data Control Tower is a container-based architecture that can be deployed with **Kubernetes**, **OpenShift**, or deployed via **virtual appliance (OVA image)**.



The DCT architecture is comprised of multiple micro-services, each running on individual pods, which allows DCT to execute highly flexible deployment by enabling users and IT organizations to enact their own backup, scaling, and resiliency standards associated with hosting container-based applications. Below is an architectural diagram of all the services that make up DCT, as well as the persistent storage for maintaining relationship metadata.



DCT is **multi-cloud enabled**, which means that a single DCT instance can be deployed to orchestrate (via HTTPS) Continuous Data and Continuous Compliance workloads with Delphix Engines located in other networks. Alternatively, DCT can be localized to engines located within a network. DCT is a lightweight management application, which means that it does not require a highly performant connection to complete its work and can serve as a central management layer for Delphix Engines globally.



# 5.1 Kubernetes

- Installation and setup for Kubernetes (see page 65)
- Ingress setup (see page 74)
- Bootstrapping API keys (see page 78)

- DCT logs for Kubernetes (see page 81)
- Admin topics (see page 81)
- MicroK8s (Kubernetes) (see page 86)

## 5.1.1 Installation and setup for Kubernetes

Before getting started, Delphix recommends engaging your Kubernetes Admin for deployment guidance on available Kubernetes deployment platforms (AKS, EKS, etc.). Configurations like node sizing and persistent volume settings will need to be determined.

### 5.1.1.1 Hardware requirements

The hardware requirements for Data Control Tower (DCT) on Kubernetes are listed below. In addition to these requirements, **inbound port 443** must be open for API clients, and **outbound port 443** to engines. This is the minimum total resource request for the Kubernetes deployment of DCT. Individual service-level resource requests are contained in the **values.yamI** file and can be overridden during deployment.

- CPU: 4-Core
- CPU architecture: x86\_64
- Memory: 16GB
- Storage: 50GB
- **Port**: 443

The recommended minimum 50 GB of storage is shared across the Kubernetes cluster (i.e. hosts). All pods and/or services use this storage for mounted volumes and other utilities, including image storage.

In a single node cluster, if shared volumes are not externalized, the host requires the full 50 GB of storage. If the persistent volume is mounted externally, the host requires 37 GB of storage, since the default storage required by the database (10 GB), gateway (1 GB), masking (1 GB), and virtualization-app (1 GB) draws from the external storage. The default storage configuration for the database, gateway, masking, and virtualization-app can be modified in values.yaml.

Many users may have default container settings as part of their Kubernetes or OpenShift infrastructure management. It is paramount to compare those default settings with the recommended minimum performance specifications (please engage your container infrastructure team to verify). If those default setting are lower, please update them to the minimum or higher.

For users who need to have limits set, you can start with the following sample configuration.

### Expand for sample configuration

dataBookmarks: resources: requests: memory: "256Mi" cpu: "100m" limits: memory: "512Mi" cpu: "300m" dataLibrary: resources: requests: memory: "256Mi" cpu: "100m" limits: memory: "1024Mi" cpu: "800m" database: resources: requests: memory: "256Mi" cpu: "200m" limits: memory: "4096Mi" cpu: "1100m" gateway: resources: requests: memory: "512Mi" cpu: "400m" limits: memory: "2048Mi" cpu: "400m" graphql: resources: requests: memory: "256Mi" cpu: "100m" limits: memory: "1024Mi" cpu: "200m" ui: resources: requests: memory: "128Mi" cpu: "100m" limits: memory: "256Mi" cpu: "200m" jobs: resources: requests:

```
memory: "256Mi"
      cpu: "200m"
    limits:
      memory: "1024Mi"
      cpu: "400m"
jobsCleaner:
  resources:
    requests:
      memory: "256Mi"
      cpu: "200m"
    limits:
      memory: "512Mi"
      cpu: "400m"
masking:
  resources:
    requests:
      memory: "512Mi"
      cpu: "500m"
    limits:
      memory: "2304Mi"
      cpu: "700m"
virtualizationApp:
  resources:
    requests:
      memory: "512Mi"
      cpu: "600m"
    limits:
      memory: "2560Mi"
      cpu: "700m"
virtualization:
  resources:
    requests:
      memory: "256Mi"
      cpu: "100m"
    limits:
      memory: "512Mi"
      cpu: "300m"
```

### 5.1.1.2 Kubernetes overview

Data Control Tower can be deployed in a matter of minutes, once a Kubernetes cluster has been identified and deployment details have been aligned with your Kubernetes administrator. The installation consists of three components:

- Kubernetes cluster: The identified infrastructure to which DCT will be deployed.
- HELM: This deploys DCT as a Kubernetes application by referencing HELM charts (.yaml files) that make up the DCT install, either by an external Helm repository (https://dlpx-helmdct.s3.amazonaws.com<sup>43</sup>, this is the quickest path to installing DCT, as it largely automated) or via

<sup>43</sup> https://dlpx-helm-dct.s3.amazonaws.com/

local install (this is accomplished by downloading the Helm charts directly via the DCT .tar file on download.delphix.com<sup>44</sup>).

• kubectl : Is a command line tool that enables administrative communication with the deployed pods (most useful post-deployment or after an upgrade).

DCT is designed to run and is supported on any Certified Kubernetes platform<sup>45</sup> that supports Helm<sup>46</sup>. See the full statement in the Getting started<sup>47</sup> page.

## 5.1.1.3 Installation requirements (Kubernetes)

a

DCT requires a running Kubernetes cluster; This could be an on-premises cluster, Azure AKS or AWS EKS cluster. DCT also requires a kubectl command line tool to interact with Kubernetes cluster and HELM for deployment on to the cluster.

Requirement	DCT recommended version	Comments
Kubernetes Cluster	1.25 or above	
HELM	3.9.0 or above	Install HELM as the package manager using the HELM installation <sup>48</sup> article.
kubectl	1.25.0 or above	<ul> <li>HELM will internally refer to the kubeconfig file to connect to the Kubernetes cluster. The default kubeconfig file is present at location: ~/.kube/config.</li> <li>If the kubeconfig file needs to be overridden while running HELM commands, set the KUBECONFIG environment variable to the location of the kubeconfig file.</li> <li>To install kubectl follow the instructions at https://kubernetes.io/docs/tasks/tools/.</li> </ul>

<sup>44</sup> http://download.delphix.com

<sup>45</sup> https://www.cncf.io/certification/software-conformance

<sup>46</sup> https://helm.sh/docs/topics/kubernetes\_distros/

<sup>47</sup> https://dct.delphix.com/docs/latest/getting-started#id-(17.0.0)Gettingstarted-Containerplatformsupport

<sup>48</sup> https://helm.sh/docs/intro/install/

## 5.1.1.4 Installing DCT from external HELM repository

### 5.1.1.4.1 Network requirements

The machine on which them *helm* commands will be executed must be able to connect to https://dlpxhelm-dct.s3.amazonaws.com (TCP on port 443). Otherwise, see the Offline mode<sup>49</sup> below.

### 5.1.1.4.2 Process

Add the DCT HELM repo with the following, which will link the DCT HELM repo to the local client HELM repo:

```
helm repo add dct-services https://dlpx-helm-dct.s3.amazonaws.com
```

Update the added repos with the following, which will update the local HELM charts metadata (index.yaml).

helm repo update

Pull the HELM charts with the following, which is used to download the .tgz file.

```
helm pull dct-services/delphix-dct --version x.0.0
```

The downloaded file is then extracted using the following command (where x.0.0 should be changed to the version of DCT being installed):

tar -xvf delphix-dct-x.0.0.tgz

Update the following properties in values.yaml which is present in the extracted folder delphix-dct.

- To generate the bootstrap APIKey, set apiKeyCreate: true.
- Provide image credentials to pull images from docker registry.
  - username: <retrieved from download.delphix.com>
  - password: <retrieved from download.delphix.com>

For getting the image credentials, visit the Delphix DCT Download<sup>50</sup> page and login with your customer login credentials. Once logged in, select the **DCT Helm Repository** link and accept the Terms and Conditions. Use password from the popup screen, as shown below.

<sup>49</sup> https://delphixdocs.atlassian.net/wiki/spaces/DCT/pages/edit-v2/688688#OFFLINE-MODE 50 https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

×

Close

### Helm Credentials: DCT Helm Repository

These credentials are linked to your organization, rather than your individual Delphix Support account, and will not expire, unless unused for an extended period of time.

Helm URL	https://dlpx-helm-dct.s3.amazonaws.com/	
Username	BDOAXpNq-y4M	Ĉ
Password	01e89511-f200-40a0-8680-96a258cf64f3	Ĉ
Organization	Delphix	

OFFLINE MODE

Offline mode is supported for scenarios including:

- · Clusters that are air-gapped and cannot access the Delphix Docker registry.
- Instances where Delphix Docker images must be pushed to an organization's internal registry for security scans or to comply with other security policies.

For these scenarios, a jumpbox machine with access to: Delphix Docker registry or download site<sup>51</sup> and the organization's internal registry is required. This jumpbox must also meet the installation prerequisites.

### 1. Get the Docker images

The two ways to get the Delphix Docker images are:

- Pull the images from Delphix Docker registry.
- Download and load the images from tarball.

<sup>51</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

### 2. Pull the images from Delphix Docker registry

Network requirements: Pulling images from the Delphix Docker registry requires the jumpbox machine to have access to https://dct.download.delphix.com and https://prod-us-west-2-starport-layer-bucket.s3.us-west-2.amazonaws.com (TCP on port 443). If a firewall is blocking access to either address, see Download and load the images from tarball<sup>52</sup> below.

- Login into the jumpbox machine.
- Pull the Docker images from the Delphix Docker registry.

```
$ docker pull dct.download.delphix.com/delphix-dct:nginx-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:app-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:data-bookmarks-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:delphix-data-
library-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:graphql-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:ipos-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:jobs-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:postgres-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:postgres-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:virtualization-x.0.0
```

• Re-tag all above Docker images. Below is a sample re-tag example for one image:

```
$ docker tag dct.download.delphix.com/delphix-dct:nginx-x.0.0 <local
registry url>:nginx-x.0.0
```

**Note:** Re-tag all remaining DCT images in the same format.

 Push re-tagged images into the internal registry. Below is a ample push example for one image:

\$ docker push <local registry url>:nginx-x.0.0

### 3. Download and load the images from tarball

If you do not have direct access to Delphix HELM and Docker repositories, download the HELM charts and Docker images packages as <u>delphix-dct-x.0.0.tar.gz</u>, which is uploaded on the <u>download site<sup>53</sup></u>.

<sup>52</sup> https://delphixdocs.atlassian.net/wiki/spaces/DCT/pages/edit-v2/688688#3.-Download-and-load-the-images-fromtarball

<sup>53</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

- · Login into the jumpbox machine.
- Download the HELM chart and Docker images packages as delphix-dct-x.0.0.tar.gz, which is uploaded on the download site<sup>54</sup>.
- Extract the downloaded .tar.gz file to get the HELM chart and Docker images.
- · Load extracted Docker images using following:

for image in \*tar; do sudo docker load --input \$image; done

• Re-tag all above Docker images. Sample re-tag example for one image:

```
$ docker tag registry.delphix.com/delphix-dct:nginx-x.0.0 <local
registry url>:nginx-x.0.0
```

Note: Re-tag all remaining DCT images in the same format.

• Push re-tagged images into internal registry. Sample push example for one image:

\$ docker push <local registry url>:nginx-x.0.0

#### 4. Deploy

- Update values.yaml for registry name and image credentials:
  - a. registry: <local registry url>
  - b. username: <local registry username>
  - c. password: <local registry password>
- Install.
  - a. Follow the instructions below.

In version 8.0.0 and above, instead of username/password, an option is available to use credentials from a pre-existing Kubernetes Secret<sup>55</sup>. To do so, instead of providing a username/password, users must create the Kubernetes Secret in the same namespace as the one used for DCT, and reference the registryKey as follows:

```
imageCredentials:
    # registry to pull docker images from.
    registry: dct.download.delphix.com/delphix-dct
    # username to login to docker registry. Do not set if registryKey is set.
```

<sup>54</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT 55 https://kubernetes.io/docs/concepts/configuration/secret/

```
username:
    # password to login to docker registry. Do not set if registryKey is set.
    password:
    # Name of an existing docker registry key to use to pull images.
    registryKey: <insert-secret-name-here>
```

After updating the values.yaml, install it using the following command:

helm install dct-services delphix-dct

delphix-dct is the name of the folder which was extracted in the previous step. dct-services is the chart name which is given for this deployment.

In the above directory structure, the **values.yaml** file contains the properties which are configured above. If you want to configure additional properties in values.yaml, create a values.yaml using the sample below. Deploy DCT using following command to use the custom values.yaml:

helm install -f <path to edited values.yaml> dct-services <directory
path of the extracted chart>

# 5.1.1.5 Sample values.yaml file

A sample values.yaml file can be downloaded by clicking this values.yaml<sup>56</sup> to start the download.

Once deployment is complete, check the status of the deployment using the following command (where X.0.0 should be changed to the version of DCT being installed):

NAME STATUS CHAF	NAMESPACE	REVISION APP	UPDATED VERSION	
dct-services deployed delp	<b>default</b> phix-dct-x.0.0	1 x.0.	2023-01-10 19:33:41.7132 0	02 -0900
				present, when

service, along with port 443 (if SSL is enabled) and port 80 (if SSL is disabled).

56 https://delphixdocs.atlassian.net/wiki/download/attachments/360448246/values.yaml? api=v2&cacheVersion=1&modificationDate=1737478287844&version=1

# 5.1.2 Ingress setup

Ingress exposes HTTP and HTTPS routes from outside the cluster toDCT running within the cluster. Find out more about Ingress from their official documentation<sup>57</sup>.

The exact steps to setup an Ingress vary by Kubernetes vendor and company policies. This section provides non-exhaustive instructions for a basic setup, but please ask your Kubernetes cluster administrator for guidance.

The proxy pod (which comes with DCT) runs an Nginx HTTP server which must be the only target of the Ingress rules, redirecting all external traffic to it. Out of the box, the pod accepts requests over HTTPs on port 443, using a self-signed certificate.

# 5.1.2.1 Expose proxy HTTP port (80) for non-encrypted traffic

After setting up an Ingress, TLS will be terminated by the HTTP server/load balancer/proxy implementing the Ingress, and not DCT. First, disable the TLS (SSL) configuration of DCT itself, making it expose port 80 for non-encrypted traffic. To do so, edit the **values.yaml** to unset the useSSL property.

Either expose proxy on SSL port or non-SSL port:

useSSL: false

Then run helm upgrade to apply the changes:

```
helm upgrade dct-services -f <path to edited values.yaml> <directory path of the extracted chart>
```

Now, the proxy pod accepts unencrypted traffic on port 80.

# 5.1.2.2 Ingress controller installation and route creation

An <u>Ingress controller<sup>58</sup></u> is required to continue. Expand a section below based on your Kubernetes environment to show the corresponding **Ingress controller installation** and **Ingress route creation** instructions.

#### **Microsoft Azure AKS**

<sup>57</sup> https://kubernetes.io/docs/reference/generated/kubernetes-api/v1.27/#ingress-v1-networking-k8s-io 58 https://kubernetes.io/docs/concepts/services-networking/ingress-controllers

#### 5.1.2.2.1 Ingress controller installation

Please follow these <u>instructions</u><sup>59</sup> to install an Nginx Ingress controller. A simple setup can be installed with these commands:

```
NAMESPACE=ingress-basic
helm repo add ingress-nginx https://kubernetes.github.io/ingress-nginx
helm repo update
helm install ingress-nginx ingress-nginx/ingress-nginx \
    --create-namespace \
    --namespace $NAMESPACE \
    --set controller.service.annotations."service\.beta\.kubernetes\.io/azure-load-
balancer-health-probe-request-path"=/healthz
```

#### 5.1.2.2.2 Ingress route creation

Create a file named ingress.yaml.

```
apiVersion: networking.k8s.io/v1
kind: Ingress
metadata:
  name: dct-ingress
  annotations:
    nginx.ingress.kubernetes.io/ssl-redirect: "true"
spec:
  ingressClassName: nginx
  rules:
    - http:
       paths:
        - path: /
          pathType: Prefix
          backend:
          service:
              name: proxy
              port:
                 number: 80
```

Apply the Ingress resource with kubectl apply :

kubectl apply -f ingress.yaml --namespace=ingress-basic

To configure TLS, see <u>Use TLS with an Ingress controller</u><sup>60</sup>.

### Amazon AWS EKS

<sup>59</sup> https://learn.microsoft.com/en-us/azure/aks/ingress-basic 60 https://learn.microsoft.com/en-us/azure/aks/ingress-tls

### 5.1.2.2.3 Ingress controller installation

Please follow these instructions<sup>61</sup> to install an <u>AWS load balancer controller</u><sup>62</sup> (An Ingress controller which configures AWS application load balancers).

### 5.1.2.2.4 Ingress route creation

Create a file named **ingress.yaml**, replacing the value of certificate-arn in the example below with the ARN of the certificate you want to use for the HTTPs endpoint.

```
apiVersion: networking.k8s.io/v1
kind: Ingress
metadata:
  name: dct-ingress
  annotations:
    kubernetes.io/ingress.class: alb
    alb.ingress.kubernetes.io/scheme: internal
    alb.ingress.kubernetes.io/target-type: ip
    alb.ingress.kubernetes.io/ssl-redirect: '443'
    alb.ingress.kubernetes.io/listen-ports: '[{"HTTP": 80}, {"HTTPS":443}]'
    alb.ingress.kubernetes.io/certificate-arn: arn:aws:acm:us-west-2:xxxxx:certificat
e/xxxxxxx
spec:
  rules:
    - http:
       paths:
        - path: /
          pathType: Prefix
          backend:
            service:
              name: proxy
              port:
                 number: 80
```

Alternatively, you may use <u>certificate discovery</u><sup>63</sup> to have the ALB select a matching certificate from <u>AWS</u> <u>Certificate manager</u><sup>64</sup> based on the host name.

```
apiVersion: networking.k8s.io/v1
kind: Ingress
metadata:
   name: dct-ingress
   annotations:
    kubernetes.io/ingress.class: alb
```

<sup>61</sup> https://docs.aws.amazon.com/eks/latest/userguide/alb-ingress.html

<sup>62</sup> https://docs.aws.amazon.com/eks/latest/userguide/aws-load-balancer-controller.html

<sup>63</sup> https://kubernetes-sigs.github.io/aws-load-balancer-controller/v2.5/guide/ingress/cert\_discovery/

<sup>64</sup> https://aws.amazon.com/certificate-manager/

```
alb.ingress.kubernetes.io/scheme: internal
    alb.ingress.kubernetes.io/target-type: ip
    alb.ingress.kubernetes.io/ssl-redirect: '443'
    alb.ingress.kubernetes.io/listen-ports: '[{"HTTP": 80}, {"HTTPS":443}]'
spec:
 tls:
  - hosts:
    - www.example.com
  rules:
    - http:
       paths:
        - path: /
          pathType: Prefix
          backend:
            service:
              name: proxy
              port:
                 number: 80
```

Apply the Ingress resource with kubectl apply :

kubectl apply -f ingress.yaml --namespace=ingress-basic

This creates an application load balancer<sup>65</sup>, which forwards all traffic to DCT.

Other

#### 5.1.2.2.5 Ingress controller installation

For self-hosted Kubernetes, you can install an Nginx Ingress controller with:

```
helm upgrade --install ingress-nginx ingress-nginx --repo https://
kubernetes.github.io/ingress-nginx --namespace ingress-nginx --create-namespace
```

Reference environment specific instructions<sup>66</sup> for a complete list of supported platforms and specific instructions.

### 5.1.2.2.6 Ingress route creation

Create a file name ingress.yaml.

```
apiVersion: networking.k8s.io/v1
kind: Ingress
metadata:
```

<sup>65</sup> https://docs.aws.amazon.com/eks/latest/userguide/alb-ingress.html 66 https://kubernetes.github.io/ingress-nginx/deploy/

```
name: dct-ingress
annotations:
    nginx.ingress.kubernetes.io/ssl-redirect: "true"
spec:
    ingressClassName: nginx
    rules:
        - http:
        paths:
            - path: /
            pathType: Prefix
            backend:
            service:
            name: proxy
            port:
            number: 80
```

Apply the Ingress resource with kubectl apply :

kubectl apply -f ingress.yaml --namespace=ingress-basic

Review the Ingress-Nginx instructions<sup>67</sup> to setup TLS.

# 5.1.3 Bootstrapping API keys

API keys are the default method used to authenticate with DCT, which is done by including the API key in the HTTP Authorization request header<sup>68</sup> with the apk type.

API keys are long-live tokens and as a result, do not automatically expire in the future. They remain valid until they are deleted or destroyed from DCT. Rotating API keys periodically is strongly recommended to avoid security risk.

Client URL (cURL) is a CLI tool for transferring data via URLs, which is how the authorization to DCT can pass. A demonstration cURL authorization with an example API key would appear as follows.

### API key

1.0p9PMkZ04Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWajuKcBT3

#### Command

curl --header 'Authorization: apk

<sup>67</sup> https://kubernetes.github.io/ingress-nginx/user-guide/tls/

<sup>68</sup> https://developer.mozilla.org/en-US/docs/Web/HTTP/Headers/Authorization

1.0p9PMkZO4Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWajuKcBT3'

cURL, similar to web browsers and other HTTP clients, will not connect to DCT over HTTPS unless a valid TLS certification has been configured for the Nginx server.

```
cURL must be on version 7.43 or higher.
```

### 5.1.3.1 Bootstrap first API key

The recommended process is that you only use the first (bootstrapped) API key to create another API key, then delete the first key promptly afterwards. This process is best for enhanced security, because the bootstrap key is more broadly accessible during setup, as it might be hardcoded in scripts, configuration files, or recorded in logs.

This process can be repeated as many times as needed, for example, in a case where existing API keys are lost or have been deleted.

Once the DCT application is started, edit the **values.yaml** file and modify the apiKeyCreate property to have a string value of true.

apiKeyCreate: true

Upgrade DCT with:

B

```
helm upgrade dct-services <directory path of extracted chart>
```

If the values.yaml file needs to be overridden from outside, use:

helm upgrade dct-services -f <path\_to\_values.yaml> <directory path of extracted chart>

A similar output should appear in the gateway pod logs with the newly generated key (please note, this is an example key):

NEWLY GENERATED API KEY: 1.0p9PMkZO4Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWaj uKcBT3

The gateway-pod-name will appear in the format of gateway-xxx and can be found using:

kubectl get pods -n dct-services

The logs for the gateway pod can be accessed using:

kubectl logs <gateway-pod-name> -n dct-services

The newly generated key can now be used to authenticate with DCT, as exemplified in the first section of this page. Remember to prefix the API key value with apk , as follows:

```
curl --header 'Authorization: apk
1.0p9PMkZ04Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWajuKcBT3'
```

Edit the values.yaml and set the apiKeyCreate property back to a string value of false and upgrade DCT again with the same command used above.

helm upgrade dct-services <directory path of extracted chart>

Like before, if the values.yaml file needs to be overridden from outside, use:

```
helm upgrade dct-services -f <path_to_values.yaml> <directory path of extracted
chart>
```

### 5.1.3.2 Create and manage API keys

As recommended above, the first API key should be used to create a new, secure admin key. To do this, create a new Account entity and set the generate\_api\_key property to true. The username value should be the desired name to uniquely identify the account.

If the cURL version is below 7.43, replace --data-raw with --data in the following.

```
curl --location --request POST 'https://<hostname>/v2/management/accounts' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk
1.0p9PMkZ04Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWajuKcBT3' \
--data-raw '{
    "username": "secure-key",
    "generate_api_key": true,
    "is_admin": true
```

### }'

A similar response should be received as shown below:

```
{
   "id": 2,
   "token": "2.vCfC0MnpySYZLshuxap2aZ7xqBKAnQvV7hFnobe7xuNlHS9AF2NQnV9XXw4UyET6"
   "username":"secure-key"
}
```

Now that the new, secure API key has been created, the old one must be deleted for the security purposes outlined in the first section of this page. To do this, make the following request:

```
curl --location --request DELETE 'https://<hostname>/v2/management/api-clients/<id>'
    \
    --header 'Content-Type: application/json' \
    --header 'Accept: application/json' \
    --header 'Authorization: apk
2.vCfC0MnpySYZLshuxap2aZ7xqBKAnQvV7hFnobe7xuNlHS9AF2NQnV9XXw4UyET6'
```

The <id> referenced above is the numeric ID of the Account entity—the integer before the period in the token. For example, the id of 1.0p9PMkZ04Hgy0ezwjhX... is 1.

To list all of the current Accounts, use:

```
curl --location --request GET 'https://<hostname>/v2/management/accounts/' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>'
```

# 5.1.4 DCT logs for Kubernetes

All DCT containers log to stdout and stderr so that their logs are processed by Kubernetes. To view container level logs running on the Kubernetes cluster use:

kubectl logs <pod\_name> -n dct-services

Log aggregators can be configured to read from stdout and stderr for all of the pods as per the requirements.

### 5.1.5 Admin topics

- Deployment upgrade for Kubernetes (see page 82)
- Factory reset DCT for Kubernetes (see page 86)

# 5.1.5.1 Deployment upgrade for Kubernetes

This page covers the upgrade process for DCT deployments on Kubernetes.

8	In DCT 12.0.0 and above, one new service (container) has been introduced named <b>Masking</b> . The memory and CPU requirement for this newly added service (container) is 512Mi and 500m, respectively.
	This container creates a new persistent volume of 1GB dynamically. If you are using pre-existing static persistent volumes for other existing pods (i.e. gateway and database), similarly to these pods, create a new persistent volume claim for the masking pod, then update the maskingPvcName property in the values.yaml with the name of static persistent volume claim.
	For customizing the <b>masking</b> service resources (i.e. requests and limits) and properties, please refer to the values.yaml file in the Helm chart of the current release.
8	Starting from DCT 15.0.0 we have introduced one new service (container) named <b>virtualization-</b> app.
8	
	<b>app</b> . The memory and CPU requirement for this newly added service (container) is 512Mi and 600m,

Create a new folder called **dct-x.0.0**, where  $\mathbf{x.0.0}$  should be changed to the version of DCT being installed (e.g. if on 5.0.2, it would be 6.0.0).

mkdir dct-x.0.0

Update the added repos with the following, which will update the local HELM charts metadata (index.yaml).

helm repo update

Pull the HELM charts with the following:

This command will download a file named delphix-dct-x.0.0.tgz in the folder dct-x.0.0.

```
cd dct-x.0.0
helm pull dct-services/delphix-dct --version x.0.0
```

The downloaded file is then extracted using the following command (where  $\times.0.0$  should be changed to the version of DCT being installed):

```
tar -xvf delphix-dct-x.0.0.tgz
```

Which will extract into the following directory structure:

```
delphix-dct
|- values.yaml
|- README.md
|- Chart.yaml
|- templates
|-<all templates files>
```

Create a new values.yaml inside to the dct-x.0.0 folder (e.g. parallel to delphix-dct folder), use sample values.yaml given below. Copy the configured properties from previous version to this newly created values.yaml<sup>69</sup>.

This values.yaml file should only contain the modified values from the previous version of deployment and not the entire values.yaml file as it is.

Update the username and password in values.yaml. It can be obtained from https://download.delphix.com<sup>70</sup>. Here are some notes in regards to this step in the process:

• This username and password update in values.yaml is only required if the user using DCT provided a Docker Registry directly in the deployment (i.e. values.yaml).

<sup>69</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360710623/values.yaml? api=v2&cacheVersion=1&modificationDate=1737478304167&version=1

<sup>70</sup> https://download.delphix.com/

### OFFLINE MODE

Offline mode is supported for scenarios including:

- Clusters that are air-gapped and cannot access the Delphix Docker registry.
- Instances where Delphix Docker images must be pushed to an organization's internal registry for security scans or to comply with other security policies.

For these scenarios, a jumpbox machine with access to both the Delphix Docker registry or download site<sup>71</sup> and the organization's internal registry is required. This jumpbox must also meet the installation prerequisites.

1. Get the Docker images

The two ways to get the Delphix Docker images are:

- Pull the images from Delphix Docker registry.
- · Download and load the images from tarball.
- 2. Pull the images from Delphix Docker registry
  - · Login into the jumpbox machine.
  - · Pull the Docker images from the Delphix Docker registry.

```
$ docker pull dct.download.delphix.com/delphix-dct:nginx-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:app-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:data-bookmarks-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:delphix-data-
library-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:graphql-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:ui-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:jobs-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:jobs-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:postgres-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:virtualization-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:virtualization-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:wirtualization-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:wirtualization-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:wirtualization-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:wirtualization-x.0.0
```

• Re-tag all above Docker images. Below is a sample re-tag example for one image:

\$ docker tag dct.download.delphix.com/delphix-dct:nginx-x.0.0 <local
registry url>:nginx-x.0.0

Note: Re-tag all remaining DCT images in the same format.

<sup>71</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

• Push re-tagged images into the internal registry. Below is a sample push example for one image:

```
$ docker push <local registry url>:nginx-x.0.0
```

3. Download and load the images from tarball

If you do not have direct access to Delphix HELM and Docker repositories, download the HELM charts and Docker images packages as <u>delphix-dct-x.0.0.tar.gz</u><sup>72</sup>, which is uploaded on the download site<sup>73</sup>.

- Login into the jumpbox machine.
- Download the HELM chart and Docker images packages as delphix-dct-x.0.0.tar.gz<sup>74</sup>, which is uploaded on the download site<sup>75</sup>.
- Extract the downloaded .tar.gz file to get the HELM chart and Docker images.
- Load extracted Docker images using following:

for image in \*tar; do sudo docker load --input \$image; done

• Re-tag all above Docker images. Sample re-tag example for one image:

```
$ docker tag registry.delphix.com/delphix-dct:nginx-x.0.0 <local
registry url>:nginx-x.0.0
```

Note: Re-tag all remaining DCT images in the same format.

• Push re-tagged images into internal registry. Sample push example for one image:

\$ docker push <local registry url>:nginx-x.0.0

#### 4. Deploy

- Update values.yaml for registry name and image credentials:
  - a. registry: <local registry url>
  - b. username: <local registry username>
  - c. password: <local registry password>
- Install.

73 https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

<sup>72</sup> https://download.delphix.com/file/12747/delphix-dct-9.0.0.tar.gz

<sup>74</sup> https://download.delphix.com/file/12747/delphix-dct-9.0.0.tar.gz

<sup>75</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

- a. Follow the instructions below.
- Run the HELM upgrade command:

helm upgrade -f values.yaml dct-services delphix-dct

### 5.1.5.2 Factory reset DCT for Kubernetes

To clean DCT installation run following command:

helm delete dct-services

А

This process will delete services pod and database both.

# 5.1.6 MicroK8s (Kubernetes)

This section describes how to deploy DCT in Micro-Kubernetes.

- MicroK8s overview (see page 86)
- MicroK8s requirements and prerequisites (see page 87)
- MicroK8s installation and setup (see page 88)
- Deploying DCT on MicroK8s (see page 90)
- Ingress route creation and accessing DCT (see page 93)
- MicroK8s troubleshooting (see page 97)
- MicroK8s backup and restore (see page 97)

# 5.1.6.1 MicroK8s overview

#### 5.1.6.1.1 Introduction

As the deployment and management of multi-container applications have become prominent for achieving scalability and reliability, Delphix introduced Kubernetes support for DCT in the past. Kubernetes (K8s) is an open-source platform tailored toward automatic management, scaling, and maintenance of containerized workloads. Data Control Tower (DCT) with Kubernetes, and now MicroK8s, work to streamline deployments and minimize operational overhead for users.

MicroK8s is a solution for those seeking the benefits of Kubernetes, without the complexity and resource requirements of a full-scale deployment. MicroK8s is a single-package, fully conformant Kubernetes

distribution that is both lightweight and production-ready. Designed to run on Linux, Windows, and MacOS, MicroK8s offers a seamless experience across platforms.

DCT is designed to run and is supported on any Certified Kubernetes platform<sup>76</sup> that supports Helm<sup>77</sup>. See the full statement in the Getting started<sup>78</sup> page.

# 5.1.6.1.2 Transition from Docker Compose

Transitioning from Docker Compose to MicroK8s for DCT would leverage Kubernetes' robust features while still maintaining simplicity and minimizing operational overhead, providing the benefit of scalability, reliability, and agility offered by containerized deployments.

For more information in regards to MicroK8s, visit the MicroK8s documentation<sup>79</sup>.

# 5.1.6.2 MicroK8s requirements and prerequisites

Deploying Data Control Tower (DCT) on MicroK8s requires consideration of both hardware and software prerequisites to ensure a smooth and efficient setup. This page outlines the essential requirements and preparatory steps needed to deploy DCT on MicroK8s successfully.

### 5.1.6.2.1 Hardware requirements

To deploy DCT on MicroK8s, these hardware specifications must be met to handle the computational and storage demands of the application. The minimum hardware requirements include:

· CPU

A

- 4-Core Processor
- CPU architecture
  - x86\_64, ensuring compatibility with the majority of modern computing environments.
- Memory
  - 16GB RAM, to adequately support the operating system, MicroK8s, and DCT components.
- Storage
  - 50GB of available disk space, to store the MicroK8s components, DCT application files, and any data processed or managed by DCT.
- Network ports
  - Inbound port 443 must be open for API clients, facilitating secure HTTPS connections to the DCT services.

<sup>76</sup> https://www.cncf.io/certification/software-conformance

<sup>77</sup> https://helm.sh/docs/topics/kubernetes\_distros/

<sup>78</sup> https://dct.delphix.com/docs/latest/getting-started#id-(17.0.0)Gettingstarted-Containerplatformsupport 79 https://microk8s.io/docs/

 Outbound port 443 should be open to engines, allowing DCT to communicate with external services and repositories.

These requirements represent the minimum configuration needed for a MicroK8s deployment of DCT. Depending on the scale of your deployment and the expected workload, additional resources may be required.

# 5.1.6.2.2 Software prerequisites

Before proceeding with the installation of MicroK8s, ensure that the following software prerequisites are met:

- **Operating system:** Linux, Windows, or MacOS, compatible with MicroK8s. Each platform has specific instructions for installing and configuring MicroK8s, which must be followed to ensure compatibility.
- Snap or Homebrew:
  - For Linux installations, snap is required to install MicroK8s. If snap is not already installed, it must be added to the system.
  - MacOS users will need brew (Homebrew) to install MicroK8s.

### 5.1.6.2.3 Network configuration

- **Open ports:** Verify that the required network ports (443 inbound and outbound) are open and not blocked by firewalls or network policies.
- **DNS and ingress:** Configuring DNS and ingress correctly is vital for routing traffic to your DCT deployment. MicroK8s includes an enable dns and enable ingress command to simplify this process.

# 5.1.6.3 MicroK8s installation and setup

Deploying Data Control Tower (DCT) on MicroK8s begins with the proper installation and setup of MicroK8s. This section provides detailed steps for installing MicroK8s on Linux (Ubuntu, CentOS, and Red Hat), MacOS, and Windows platforms, along with initial configuration steps to prepare your environment for DCT deployment.

To get started, please visit one of the corresponding pages:

• MicroK8s on Linux (online mode) (see page 88)

### 5.1.6.3.1 MicroK8s on Linux (online mode)

Installation and setup for MicroK8s on Linux distributions.

### 5.1.6.3.1.1 Ubuntu

1. Install MicroK8s:

Open a terminal and execute the following command to install MicroK8s:

```
sudo snap install microk8s --classic --channel=1.25
```

a. If snap is not installed on your system, follow the instructions here<sup>80</sup> to install it.

#### 2. Join the MicroK8s group:

MicroK8s creates a user group to enable seamless command execution. Add your user to this group and set the correct permissions for the .kube caching directory with:

```
sudo usermod -a -G microk8s $USER
sudo chown -f -R $USER ~/.kube
```

a. Re-login or restart your session to apply the group changes:

```
3. su - $USER
```

### 4. Check MicroK8s status:

Ensure MicroK8s is correctly installed and ready by checking its status:

```
microk8s status --wait-ready
```

#### 5. Enable add-ons:

Enable essential add-ons for DCT deployment:

```
microk8s enable hostpath-storage
microk8s enable helm
microk8s enable dns
microk8s enable ingress
```

6. Create an alias for kubectl and helm

Facilitate command usage with an alias for microk8s kubectl and microk8s helm

```
echo "alias kubectl='microk8s kubectl'" >> ~/.bash_aliases
echo "alias helm='microk8s helm'" >> ~/.bash_aliases
source ~/.bash_aliases
```

### 5.1.6.3.1.2 CentOS and Red Hat

For CentOS and Red Hat, the installation process diverges primarily due to the absence of snap by default.

<sup>80</sup> https://snapcraft.io/docs/installing-snapd

#### 1. Enable snapd:

First, enable the EPEL repository and install snapd :

sudo yum install epel-release
sudo yum install snapd

- a. Then, start and enable snapd :
- 2. sudo systemctl enable --now snapd.socket
  - a. For CentOS, you may also need to enable classic snap support by creating a symbolic link:
- 3. sudo ln -s /var/lib/snapd/snap /snap

#### 4. Install MicroK8s:

With snapd enabled, you can now install MicroK8s using snap :

sudo snap install microk8s --classic --channel=1.25

#### 5. Group and permissions:

Follow the same steps as for Ubuntu to add your user to the MicroK8s group and adjust permissions for the .kube directory.

- Check status and enable add-ons: Verify MicroK8s installation and enable the necessary add-ons as outlined in the Ubuntu section.
- Alias for kubectl and helm Create and source the alias for kubectl and helm as described for Ubuntu.

# 5.1.6.4 Deploying DCT on MicroK8s

This page provides steps for deploying Data Control Tower (DCT) on MicroK8s using Helm charts. The process involves adding the DCT Helm repository, configuring the deployment through values.yaml, and handling deployments in both online and offline environments.

# 5.1.6.4.1 Adding the DCT Helm repository

This command registers the DCT services repository with your Helm client, making the charts available for your deployment.

helm repo add dct-services https://dlpx-helm-dct.s3.amazonaws.com

### 5.1.6.4.2 Updating Helm repositories

After adding the DCT repository, update your local Helm charts metadata to ensure you have the latest versions available:

helm repo update

### 5.1.6.4.3 Downloading and preparing the DCT Helm chart

Pull the required version of the Helm chart for DCT using the Helm pull command. Replace  $\times.0.0$  with the specific version of DCT you intend to install:

helm pull dct-services/delphix-dct --version x.0.0

Extract the downloaded chart with the following command:

```
tar -xvf delphix-dct-x.0.0.tgz
```

#### 5.1.6.4.4 Configuring the deployment

Navigate to the extracted folder and update the values.yaml file with necessary configurations:

- To automatically generate a bootstrap API key, set apiKeyCreate: true.
- Provide the Docker registry credentials (username and password) for pulling images. These credentials can be retrieved from the Delphix DCT Download page by logging in with your user login.

### 5.1.6.4.5 Deploying DCT

With the values.yaml file configured, deploy DCT using Helm with the following command:

helm install dct-services delphix-dct

### 5.1.6.4.6 Handling offline mode

For environments without direct access to the Delphix Helm and Docker repositories:

- 1. Download the delphix-dct-x.0.0.tar.gz package from the download site.
- 2. Extract the Helm chart and Docker images from the downloaded file.
- 3. Load the Docker images into your local Docker environment using:

for image in \*tar; do sudo docker load --input \$image; done

4. Re-tag and push the Docker images to your local registry. Follow the format for tagging images:

```
docker tag registry.delphix.com/delphix-dct:app-x.0.0 <local registry url>:app-
x.0.0
```

5. Update the values.yaml with your local registry name and credentials.

### 5.1.6.4.7 Utilizing MicroK8s' built-in registry for DCT Docker images

MicroK8s includes a built-in Docker registry that allows you to store Docker images directly on your MicroK8s instance. This is particularly useful for single VM solutions, providing a more integrated and straightforward approach to managing Docker images for DCT deployment.

#### 5.1.6.4.7.1 Process

1. MicroK8s comes with an add-on registry that can be enabled with:

microk8s enable registry

- a. This command sets up a Docker registry within MicroK8s, accessible on port 32000.
- 2. After loading your DCT Docker images into MicroK8s, they must be re-tagged to use them in the local MicroK8s registry. Use the following format for re-tagging your images:

```
docker tag registry.delphix.com/delphix-dct:app-x.0.0 localhost:32000/delphix-
dct:app-x.0.0
```

3. Once re-tagged, push the images to the MicroK8s registry by running:

```
docker push localhost:32000/delphix-dct:app-x.0.0
```

- a. This command uploads the re-tagged DCT images to the built-in Docker registry of your MicroK8s instance.
- 4. With the images now hosted in the MicroK8s registry, update the values.yaml file to reference the local images. Change the image repository to use the MicroK8s registry URL:

registry: localhost:32000

This will have Helm pull the Docker images from the MicroK8s internal registry during the deployment of DCT, to streamline deployment within a single VM solution.

# 5.1.6.5 Ingress route creation and accessing DCT

After successfully deploying Data Control Tower (DCT) on MicroK8s, the final step involves creating an ingress route to manage external traffic to DCT services efficiently. This page covers the process of configuring ingress within your MicroK8s environment.

There are two options two configure ingress:

- 1. With valid certificates(Recommended).
- 2. With default self sign certificate.

# 5.1.6.5.1 1. With valid certificates

The proxy pod (which comes with DCT) runs an Nginx HTTP server which must be the only target of the Ingress rules, redirecting all external traffic to it. Out of the box, the pod accepts requests over HTTPs on port 443, using a self-signed certificate.

### 5.1.6.5.1.1 Expose proxy HTTP port (80) for non-encrypted traffic

After setting up an Ingress, TLS will be terminated by the HTTP server/load balancer/proxy implementing the Ingress, and not DCT. First, disable the TLS (SSL) configuration of DCT itself, making it expose port 80 for non encrypted traffic. To do so, edit the **values.yaml** to unset the useSSL property.

Either expose proxy on SSL port or non SSL port:

```
useSSL: false
```

Then run helm upgrade to apply the changes:

```
helm upgrade dct-services -f <path to edited values.yaml> <directory path of the extracted chart>
```

Now, the proxy pod accepts unencrypted traffic on port 80.

#### 5.1.6.5.1.2 Create Secret with SSL certificate.

This section explains the process of adding the certificates to a kubernets secret, which is then used while creating the ingress.

These follow points are required:

Administrative access to the MicroK8s cluster.

• The new SSL certificate(public key) and private key files ready for deployment for e.g server.crt and server.key.

```
kubectl create secret tls ingress-tls --namespace dct-services --key <private key> --
cert <public certificate>
```

### 5.1.6.5.1.3 Creating the Ingress Class

Begin by defining an Ingress Class, which specifies the Ingress Controller that will manage the ingress resources. Create a file named ingressClass.yaml with the following content:

```
apiVersion: networking.k8s.io/v1
kind: IngressClass
metadata:
   name: nginx
   namespace: dct-services
   annotations:
        ingressclass.kubernetes.io/is-default-class: "true"
spec:
   controller: k8s.io/ingress-nginx
```

This configuration sets up an Nginx Ingress Controller as the default class for handling ingress in the dctservices namespace.

### 5.1.6.5.1.4 Configuring the ingress resource

Next, define the ingress rules for routing traffic to the DCT services. Create a file named ingress.yaml with the following configuration:

**Note:** Replace [HOSTNAME] with the actual hostname or IP address of your MicroK8s cluster.

```
apiVersion: networking.k8s.io/v1
kind: Ingress
metadata:
   name: dct-ingress
   namespace: dct-services
spec:
   ingressClassName: nginx
   tls:
      - hosts:
      - [HOSTNAME]
      secretName: ingress-tls
   rules:
      - host: "[HOSTNAME]"
      http:
```

```
paths:
- path: /
   pathType: Prefix
   backend:
      service:
      name: proxy
   port:
      number: 80
```

This ingress configuration directs all HTTP traffic arriving at the root path ( / ) to the proxy service on port 80.

### 5.1.6.5.1.5 Applying the ingress configuration

With both the ingressClass.yaml and ingress.yaml files created, apply these configurations to your MicroK8s cluster using the following commands:

```
kubectl apply -f ingressClass.yaml
kubectl apply -f ingress.yaml
```

These commands register the ingress class and resource with your Kubernetes cluster, enabling the Nginx Ingress Controller to start routing external traffic to your DCT services.

### 5.1.6.5.2 2. With default self sign certificate

#### 5.1.6.5.2.1 Creating the Ingress Class

Begin by defining an Ingress Class, which specifies the Ingress Controller that will manage the ingress resources. Create a file named ingressClass.yaml with the following content:

```
apiVersion: networking.k8s.io/v1
kind: IngressClass
metadata:
   name: nginx
   namespace: dct-services
   annotations:
        ingressclass.kubernetes.io/is-default-class: "true"
spec:
   controller: k8s.io/ingress-nginx
```

This configuration sets up an Nginx Ingress Controller as the default class for handling ingress in the dctservices namespace.

### 5.1.6.5.2.2 Configuring the ingress resource

Next, define the ingress rules for routing traffic to the DCT services. Create a file named ingress.yaml with the following configuration:

```
apiVersion: networking.k8s.io/v1
kind: Ingress
metadata:
  name: dct-ingress
  namespace: dct-services
  annotations:
    nginx.ingress.kubernetes.io/backend-protocol: "HTTPS"
spec:
  ingressClassName: nginx
  rules:
    - http:
        paths:
        - path: /
          pathType: Prefix
          backend:
            service:
              name: proxy
              port:
                 number: 443
```

This ingress configuration directs all HTTP traffic arriving at the root path ( / ) to the proxy service on port 443, using HTTPS as the backend protocol.

### 5.1.6.5.2.3 Applying the ingress configuration

With both the ingressClass.yaml and ingress.yaml files created, apply these configurations to your MicroK8s cluster using the following commands:

```
kubectl apply -f ingressClass.yaml
kubectl apply -f ingress.yaml
```

These commands register the ingress class and resource with your Kubernetes cluster, enabling the Nginx Ingress Controller to start routing external traffic to your DCT services.

#### 5.1.6.5.2.4 Accessing DCT

Once the ingress route is successfully created and active, you can access the DCT UI and Swagger documentation through the following URLs:

- DCT UI: <https://[HOSTNAME]:443 >
- Swagger API Documentation: <https://[HOSTNAME]:443/api >

Replace [HOSTNAME] with the actual hostname or IP address of your MicroK8s cluster.

Note: If ingress is configured with default certificate, browser will show a warning message.

# 5.1.6.6 MicroK8s troubleshooting

### 5.1.6.6.1 Troubleshooting

Here are some common issues and solutions that could come up while implementing DCT on MicroK8s.

- Issue: MicroK8s services fail to start.
  - **Solution:** Ensure that all system requirements are met and that there are no conflicts with port allocations. Check the system logs for specific error messages.
- Issue: DCT deployment fails due to Helm chart errors.
  - **Solution:** Verify that the Helm version is compatible with the DCT Helm chart. Ensure that the values.yaml file is correctly configured according to the deployment needs.

### 5.1.6.7 MicroK8s backup and restore

Backing up and restoring DCT data on MicroK8s involves the following steps, which help ensure data integrity and availability, especially when using hostpath volume mounts.

### 5.1.6.7.1 Backup

- 1. Determine which data or directories need to be backed up. This could include database files, application state, configuration files, and any other critical data.
- 2. Example command to backup a DCT data directory:

```
sudo cp -r /var/snap/microk8s/common/default-storage/dct-data /path/to/backup/
location/dct-data-backup
```

a. For Hostpath Volumes: Navigate to the directory where the hostpath volumes are stored on your MicroK8s node. Use standard file system operations to copy the relevant directories and files to a backup location. This could be an external storage device or a remote backup service.

### 5.1.6.7.2 Restore

- Ensure the DCT services that use the data are temporarily stopped to prevent data corruption during the restore process.
- 2. Example command to restore DCT data from backup:

sudo cp -r /path/to/backup/location/dct-data-backup /var/snap/microk8s/common/
default-storage/dct-data

- a. **For Hostpath Volumes:** Copy the backup data back into the original hostpath volume directory. Ensure that file permissions and ownership are correctly set to match the requirements of your DCT deployment.
- Once the data is restored, restart the DCT services to make sure they are recognized and utilize the restored data.

Schedule regular backups of critical data to reduce the risk of significant data loss.

# 5.2 OpenShift

- Installation and setup for OpenShift (see page 98)
- OpenShift authentication (see page 109)
- DCT logs for OpenShift (see page 110)
- Admin topics for OpenShift (see page 110)

# 5.2.1 Installation and setup for OpenShift

### 5.2.1.1 Hardware requirements

The hardware requirements for Data Control Tower to deploy on OCP are listed below. In addition to these requirements, inbound port 443 or 80 must be open for API clients. This is the minimum total resource requirement for the deployment.

- CPU: 4-Core
- CPU Architecture: x86\_64
- Memory: 16GB
- Storage: 50GB
- **Port**: 443

The recommended minimum 50 GB of storage is shared across the Kubernetes cluster (i.e. hosts). All pods and/or services use this storage for mounted volumes and other utilities, including image storage.

In a single node cluster, if shared volumes are not externalized, the host requires the full 50 GB of storage. If the persistent volume is mounted externally, the host requires 37 GB of storage, since the default storage required by the database (10 GB), gateway (1 GB), masking (1 GB) and virtualization-app (1 GB) draws from the external storage. The default storage configuration for the database, gateway, masking, and virtualization-app can be modified in the values.yaml file.

Many users may have default container settings as part of their Kubernetes or OpenShift infrastructure management. It is paramount to compare those default settings with the recommended minimum performance specifications (please engage your container infrastructure team to verify). If those default setting are lower, please update them to the minimum or higher.

For users who need to have limits set, you can start with the following sample configuration.

dataBookmarks: resources: requests: memory: "256Mi" cpu: "100m" limits: memory: "512Mi" cpu: "300m" dataLibrary: resources: requests: memory: "256Mi" cpu: "100m" limits: memory: "1024Mi" cpu: "800m" database: resources: requests: memory: "256Mi" cpu: "200m" limits: memory: "4096Mi" cpu: "1100m" gateway: resources: requests: memory: "512Mi" cpu: "400m" limits: memory: "2048Mi" cpu: "400m" graphql: resources: requests: memory: "256Mi" cpu: "100m" limits: memory: "1024Mi" cpu: "200m"

```
ui:
  resources:
    requests:
      memory: "128Mi"
      cpu: "100m"
    limits:
      memory: "256Mi"
      cpu: "200m"
jobs:
  resources:
    requests:
      memory: "256Mi"
      cpu: "200m"
    limits:
      memory: "1024Mi"
      cpu: "400m"
jobsCleaner:
  resources:
    requests:
      memory: "256Mi"
      cpu: "200m"
    limits:
      memory: "512Mi"
      cpu: "400m"
masking:
  resources:
    requests:
      memory: "512Mi"
      cpu: "500m"
    limits:
      memory: "2304Mi"
      cpu: "700m"
virtualizationApp:
  resources:
    requests:
      memory: "512Mi"
      cpu: "600m"
    limits:
      memory: "2560Mi"
      cpu: "700m"
virtualization:
  resources:
    requests:
      memory: "256Mi"
      cpu: "100m"
    limits:
      memory: "512Mi"
      cpu: "300m"
```

# 5.2.1.2 Installation requirements (OpenShift)

8

DCT is designed to run and is supported on any Certified Kubernetes platform<sup>81</sup> that supports Helm<sup>82</sup>. See the full statement in the Getting started<sup>83</sup> page.

DCT requires a running OpenShift cluster to run, oc command line tool to interact with OpenShift cluster, and HELM for deployment onto the cluster.

Requirement	DCT Recommended Version	Comments
OpenShift Cluster	4.12 or above	
HELM	3.9.0 or above	HELM installation should support HELM v3. More information on HELM can be found at https:// helm.sh/docs/.
		To install HELM, follow the installation instructions at https://helm.sh/docs/intro/install/.
oc	4.11.3 or above	To install oc , follow the instructions at https:// docs.openshift.com/container- platform/4.16/cli_reference/ openshift_cli/getting-started- cli.html.

If an intermediate HELM repository is to be used instead of the default Delphix HELM repository, then the repository URL, username, and password to access this repository needs to be configured in the values.yaml file under imageCredentials section.

<sup>81</sup> https://www.cncf.io/certification/software-conformance

<sup>82</sup> https://helm.sh/docs/topics/kubernetes\_distros/

<sup>83</sup> https://dct.delphix.com/docs/latest/getting-started#id-(17.0.0)Gettingstarted-Containerplatformsupport

# 5.2.1.3 Installation process

### 5.2.1.3.1 Jump box setup

### 5.2.1.3.1.1 OC login

Run the OC login command to authenticate OpenShift CLI with the server:

```
oc login https://openshift1.example.com --token=<<token>>
```

# 5.2.1.3.1.2 Verify KubeConfig

HELM will use the configuration file inside the **\$HOME/.kube/** folder to deploy artifacts on an OpenShift cluster.

Be sure the config file has the cluster context added, and the current-context is set to use this cluster. To verify the context, run this command:

oc config current-context

### 5.2.1.3.1.3 Create a new project

Create a new project named dct-services using the command below:

```
oc new-project dct-services --description="DCT Deployment project" --display-name="dc
t-services"
```

#### 5.2.1.3.1.4 Installing Helm

Install HELM using the following installation instructions mentioned at https://helm.sh/docs/intro/install/.

### 5.2.1.3.2 Deploy DCT chart

Add the DCT HELM repo with the following, which will link the DCT HELM repo to the local HELM repo:

```
helm repo add dct-services https://dlpx-helm-dct.s3.amazonaws.com
```

Update the added repos with the following, which will update the local HELM charts metadata (index.yaml):

helm repo update

Pull the HELM charts with the following, which is used to download the .tgz file:

```
helm pull dct-services/delphix-dct --version x.0.0
```

The downloaded file is then extracted using the following command (where  $\times.0.0$  should be changed to the version of DCT being installed):

tar -xvf delphix-dct-x.0.0.tgz

Update the following properties in the values.yaml file, present in the extracted delphix-dct folder.

- To generate the bootstrap APIKey, set apiKeyCreate: true.
- Provide image credentials to pull images from docker registry.
  - username: <retrieved from download.delphix.com>
  - password: <retrieved from download.delphix.com>
- isOpenshift should be set to true.

To get the image credentials, visit the Delphix DCT Download<sup>84</sup> page and login with your user login credentials. Once logged in, select the **DCT Helm Repository** link and accept the Terms and Conditions. Use password from the popup screen, as shown below.

Helm Credentials: DCT Helm Repository

×

These credentials are linked to your organization, rather than your individual Delphix Support account, and will not expire, unless unused for an extended period of time.

Helm URL	https://dlpx-helm-dct.s3.amazonaws.com/	
Username	BDOAXpNq-y4M	
Password	01e89511-f200-40a0-8680-96a258cf64f3	Ĉ
Organization	Delphix	

Close

84 https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

# 5.2.1.4 Offline mode

### Instructions for offline mode

An offline mode is supported for use cases where:

- 1. The cluster can be air gapped (it does not have access to the Delphix Docker registry).
- 2. Delphix Docker images should first be pushed to the organization's internal Artifactory or registry for scanning and to comply with any other security policies in place.

If one such use case exists, retrieve the Delphix Docker images, Helm chart, and deploy. A jump box machine is needed, which has access to both Delphix Docker registry<sup>85</sup>/download site<sup>86</sup> and the organization's internal Artifactory/registry. In addition, the jump box machine must satisfy the installation requirements.

#### 5.2.1.4.1 Get the Docker images

There are two ways to retrieve the Delphix Docker images:

- 1. Pull the images from the Delphix Docker registry.
- 2. Download and load the images from tarball.

### 5.2.1.4.1.1 **1. Pulling images from Docker registry**

- Login into the jump box machine.
- Pull the Docker images from the Delphix Docker registry.

```
$ docker pull dct.download.delphix.com/delphix-dct:nginx-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:app-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:data-bookmarks-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:delphix-data-library-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:graphql-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:ui-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:jobs-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:jobs-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:postgres-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:virtualization-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:virtualization-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:virtualization-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:virtualization-x.0.0
```

• Re-tag all above Docker images. This is a sample re-tag for one image:

```
$ docker tag dct.download.delphix.com/delphix-dct:nginx-x.0.0 <local registry
url>:nginx-x.0.0
```

Note: Re-tag all remaining DCT images in the same format.

<sup>85</sup> http://dct.download.delphix.com/delphix-dct

<sup>86</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

• Push re-tagged images into the internal registry. This is a sample push example for one image:

\$ docker push <local registry url>:nginx-x.0.0

### 5.2.1.4.1.2 2. Download tarball images

If you do not have direct access to Delphix HELM and Docker repositories, download the HELM charts and Docker images packages as <u>delphix-dct-x.0.0.tar.gz</u><sup>87</sup>, which is available on the <u>download site</u><sup>88</sup>.

- · Login into the jump box machine.
- Download the HELM chart and docker images packages as delphix-dct-x.0.0.tar.gz<sup>89</sup>, which is available on the download site<sup>90</sup>.
- Extract the downloaded.tar.gz file to get the HELM chart and Docker images.
- · Load extracted Docker images using following:

for image in \*tar; do sudo docker load --input \$image; done

• Re-tag all above Docker images. Sample re-tag example for one image:

```
$ docker tag registry.delphix.com/delphix-dct:nginx-x.0.0 <local registry
url>:nginx-x.0.0
```

Note: Re-tag all remaining DCT images in the same format.

• Push re-tagged images into internal registry. Sample push example for one image:

\$ docker push <local registry url>:nginx-x.0.0

### 5.2.1.4.2 Deploy

- 1. Update the values.yaml file for registry name and image credentials:
  - a. Registry: <local registry url>
  - b. Username: <local registry username>
  - c. Password: <local registry password>
- 2. Install.
  - a. Follow the instructions below.

88 https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

<sup>87</sup> https://download.delphix.com/file/12747/delphix-dct-9.0.0.tar.gz

<sup>89</sup> https://download.delphix.com/file/12747/delphix-dct-9.0.0.tar.gz

<sup>90</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

### 5.2.1.4.2.1 Find and update fsGroup in values.yaml file

The **fsGroup** field is used to specify a supplementary group ID. All processes of the container, the owner of the volume, and any files created on the volume are also part of this supplementary group ID.

For OpenShift deployment, this value need to be specified in the values.yaml file.

Find the allowed supplementary group range:

#### oc get project dct-services -o yaml

A response should appear as follows:

```
apiVersion: project.openshift.io/v1
kind: Project
metadata:
 annotations:
    openshift.io/description: ""
    openshift.io/display-name: ""
    openshift.io/requester: cluster-admin
    openshift.io/sa.scc.mcs: s0:c32,c4
    openshift.io/sa.scc.supplemental-groups: 1001000000/10000
    openshift.io/sa.scc.uid-range: 1001000000/10000
 creationTimestamp: "2023-01-18T10:33:04Z"
  labels:
    kubernetes.io/metadata.name: dct-services
    pod-security.kubernetes.io/audit: restricted
    pod-security.kubernetes.io/audit-version: v1.24
    pod-security.kubernetes.io/warn: restricted
    pod-security.kubernetes.io/warn-version: v1.24
 name: dct-services
  resourceVersion: "99974"
 uid: ccdd5c9f-2ce5-49b4-91a7-662e0598b63b
spec:
  finalizers:
  - kubernetes
status:
 phase: Active
```

Copy the first value from the openshift.io/sa.scc.supplemental-groups line, before the slash (e.g. 1001000000). Paste this value in the values.yaml file:

```
# Define SecurityContextConstraints for the pod
podSecurityContext:
  fsGroup: 1001000000
```

### 5.2.1.4.2.2 Deploy DCT

Run the following command to deploy the DCT chart (where  $\times.0.0$  should be changed to the version of DCT being installed):

#### helm install dct-services delphix-dct

**delphix-dct** is the name of the folder which was extracted in the previous step. dct-services is the chart name which is given for this deployment.

In the above directory structure, the **values.yaml** file contains the properties which are configured above. Deploy DCT using following command to use the custom values.yaml:

```
helm install dct-services -f <path to edited values.yaml> <directory
path of the extracted chart>
```

### 5.2.1.4.2.3 Verify deployment

All the images will be downloaded and then deployed. If some pods restarted at the startup, this is expected. After some time, a total of 9 pods will be in running status and one job pod will be in completed status.

```
oc get pods -n dct-services
```

#### 5.2.1.4.2.4 Find API key

For the very first deployment bootstrap API key will be printed in logs, please view gateway pod logs and find for "NEWLY GENERATED API KEY". the value is the API key.

```
oc logs <gateway-pod-name> -n dct-services
```

# 5.2.1.5 Configure Ingress

DCT only works with HTTPS Ingress, the UI does not support HTTP.

### 5.2.1.5.1 Creating route

To create a route, you can use the OpenShift console and create a new one for the DCT service.

If SSL is terminated at this route, only then should the useSSL value in values.yaml be updated to false, so that 80 port will be exposed in proxy service and can be used to configure the route. The following screenshot shows the route that forwards requests to 80 port of proxy service:

<b>Red Hat</b> OpenShift	
📽 Administrator	Project: apigw-services 💌
	Configure via:   Form view O YAML view
Home	> Name*
Operators	> det
Modelanda	A unique name for the Route within the project.
Workloads	Hostname
Networking	dct.delphix.com
Services	Public hostname for the Route. If not specified, a hostname is generated.
Routes	Path
Ingresses	7 Path that the router watches to route traffic to the service.
NetworkPolicies	Service "
	S proxy -
Storage	> Service to route to.
Builds	Add alternate Service
Bullas	Target port *
Observe	> 80→8083 (TCP) •
Commute	Target port for traffic.
Compute	Second
User Management	Secure Route Routes can be secured using several TLS termination types for serving certificates.
Administration	> TLS termination *
Administration	Edge
	Insecure traffic
	Redirect
	Policy for traffic on insecure schemes like HTTP.
	Certificates
	TLS certificates for edge and re-encrypt termination. If not specified, the router's default certificate is used.

If SSL is not terminated at the Route level, then create a PassTrough route and use 443 port of the proxy service, and configure the SSL certificate and key in the values.yaml file:

Red Hat OpenShift	
🕫 Administrator 🛛 👻	Project: apigw-services 🔻
Home >	Routing is a way to make your application publicly visible.
Operators >	Configure via:   Form view  YAML view Name *
Workloads >	Name * dct
Networking 🗸	A unique name for the Route within the project.
rethonding	Hostname
Services	dct.delphix.com Public hostname for the Route. If not specified, a hostname is generated.
Routes	Path
Ingresses NetworkPolicies	/
Network-olicles	Path that the router watches to route traffic to the service.
Storage >	Service *
	S proxy -
Builds >	Service to route to.    Add alternate Service
Observe >	Target port*
Compute >	443 → 8443 (TCP) •
	Target port for traffic.
User Management >	Security
Administration >	Secure Route Routes can be secured using several TLS termination types for serving certificates.
	TLS termination •
	Passthrough
	Insecure traffic
	Redirect 🗸
	Policy for traffic on insecure schemes like HTTP.
	Create

## 5.2.2 OpenShift authentication

### 5.2.2.1 Introduction

DCT uses Nginx/OpenResty as an HTTP server and a reverse proxy for the application. Using the default configuration, all connections to DCT are over HTTPS and require the user to authenticate. There are three supported methods for authentication; API keys, Username/Password, and OpenID Connect.

## 5.2.2.2 Enable OAuth2 authentication

By default APIKey authentication will be enabled and when DCT starts it will generate a new API key (see page 129) in logs if you want to enable openId connect authentication then follow below procedure:

Update the below properties in the values.yaml file and restart DCT:

```
# flag to enable api_key based authentication
apiKeyEnabled: false
# flag to enable OAuth2 based authentication
openIdEnabled: true
# URL of the discovery endpoint as defined by the OpenId Connect Discovery
specification. This needs to be set if 'openIdEnabled' is set to true
openIdServerUrl: https://delphix.okta.com/oauth2/default/.well-known/oauth-
authorization-server
# OAuth2 jwt claim name that should be used as client_id
jwtClaimForClientId: sub
# OAuth2 jwt claim name that should be used as client_name
jwtClaimForClientName: sub
```

### 5.2.3 DCT logs for OpenShift

All DCT containers log to **stdout** and **stderr**, so that their logs are processed by OpenShift. To view container level logs running on the OpenShift cluster, use this command:

```
oc logs <pod_name> -n dct-services
```

Log aggregators can be configured to read from **stdout** and **stderr** for all of the pods as per the requirements.

### 5.2.4 Admin topics for OpenShift

- Deployment upgrade for OpenShift (see page 110)
- Factory reset DCT for OpenShift (see page 114)

### 5.2.4.1 Deployment upgrade for OpenShift

This page covers the upgrade process for DCT deployments on Kubernetes.

In DCT 12.0.0 and above, one new service (container) has been introduced named Masking.

The memory and CPU requirement for this newly added service (container) is 512Mi and 500m, respectively.

This container creates a new persistent volume of 1GB dynamically. If you are using pre-existing static persistent volumes for other existing pods (i.e. gateway and database), similarly to these pods, create a new persistent volume claim for the masking pod, then update the maskingPvcName property in the values.yaml with the name of static persistent volume claim.

For customizing the **masking** service resources (i.e. requests and limits) and properties, please refer to the values.yaml file in the Helm chart of the current release.

Starting from DCT 15.0.0 we have introduced one new service (container) named **virtualizationapp**.

The memory and CPU requirement for this newly added service (container) is 512Mi and 600m, respectively.

This container creates a new persistent volume of 1GB dynamically. If you are using pre-existing static persistent volumes for other existing pods (i.e. gateway and database), similarly to these pods, create a new persistent volume claim for the virtualization-app pod, then update the virtualizationAppPvcName property in the values.yaml with the name of the static persistent volume claim.

For customizing **virtualization-app** service resources (i.e. request and limits) and properties, please refer values.yaml file in the Helm chart of thre current release.

Create a new folder called **dct-x.0.0** where  $\times .0.0$  should be changed to the version of DCT being installed (e.g. if on 5.0.2, it would be 6.0.0).

mkdir dct-x.0.0

Update the added repos with the following, which will update the local HELM charts metadata (index.yaml):

helm repo update

Pull the HELM charts:

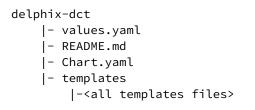
This command will download a file named **delphix-dct-x.0.0.tgz** in the folder dct-x.0.0.

```
cd dct-x.0.0
helm pull dct-services/delphix-dct --version x.0.0
```

The downloaded file is then extracted using the following command (where  $\times.0.0$  should be changed to the version of DCT being installed):

tar -xvf delphix-dct-x.0.0.tgz

Which will extract into the following directory structure:



Create a new values.yaml inside to the dct-x.0.0 folder (e.g. parallel to delphix-dct folder), use sample values.yaml given below. Copy the configured properties from previous version to this newly created values.yaml<sup>91</sup>.

The values.yaml file contains only modified values from the previous version of deployment.

Update the username and password in values.yaml. It can be obtained from https://download.delphix.com<sup>92</sup>. Here are some notes in regards to this step in the process:

• This username and password update in values.yaml is only required if the user using Delphix provided a Docker Registry directly in the deployment (i.e. values.yaml).

Username and password update in values.yaml is required only if username AWS and temporary password (12 hours expiry) is used.

#### OFFLINE MODE

=

Offline mode is supported for scenarios including:

- Clusters that are air-gapped and cannot access the Delphix Docker registry.
- Instances where Delphix Docker images must be pushed to an organization's internal registry for security scans or to comply with other security policies.

For these scenarios, a jumpbox machine with access to both the Delphix Docker registry or download site<sup>93</sup> and the organization's internal registry is required. This jumpbox must also meet the installation prerequisites.

<sup>91</sup> https://delphixdocs.atlassian.net/wiki/download/attachments/360677881/values.yaml? api=v2&cacheVersion=1&modificationDate=1737478318330&version=1

<sup>92</sup> https://download.delphix.com/

<sup>93</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

#### 1. Get the Docker images

The two ways to get the Delphix Docker images are:

- Pull the images from Delphix Docker registry.
- Download and load the images from tarball.
- 2. Pull the images from Delphix Docker registry
- Login into the jumpbox machine.
- Pull the Docker images from the Delphix Docker registry.

```
$ docker pull dct.download.delphix.com/delphix-dct:nginx-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:app-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:data-bookmarks-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:delphix-data-
library-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:graphql-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:ui-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:jobs-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:jobs-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:postgres-x.0.0
$ docker pull dct.download.delphix.com/delphix-dct:virtualization-x.0.0
```

• Re-tag all above Docker images. Below is a sample re-tag example for one image:

```
$ docker tag dct.download.delphix.com/delphix-dct:nginx-x.0.0 <local
registry url>:nginx-x.0.0
```

Note: Re-tag all remaining DCT images in the same format.

 Push re-tagged images into the internal registry. Below is a ample push example for one image:

\$ docker push <local registry url>:nginx-x.0.0

#### 3. Download and load the images from tarball

If you do not have direct access to Delphix HELM and Docker repositories, download the HELM charts and Docker images packages as <u>delphix-dct-x.0.0.tar.gz</u><sup>94</sup>, which is uploaded on the download site<sup>95</sup>.

• Login into the jumpbox machine.

<sup>94</sup> https://download.delphix.com/file/12747/delphix-dct-9.0.0.tar.gz

<sup>95</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

- Download the HELM chart and Docker images packages as delphix-dct-x.0.0.tar.gz<sup>96</sup>, which is uploaded on the download site<sup>97</sup>.
- Extract the downloaded .tar.gz file to get the HELM chart and Docker images.
- · Load extracted Docker images using following:

for image in \*tar; do sudo docker load --input \$image; done

• Re-tag all above Docker images. Sample re-tag example for one image:

```
$ docker tag registry.delphix.com/delphix-dct:nginx-x.0.0 <local
registry url>:nginx-x.0.0
```

Note: Re-tag all remaining DCT images in the same format.

• Push re-tagged images into internal registry. Sample push example for one image:

\$ docker push <local registry url>:nginx-x.0.0

- 4. Deploy
  - Update values.yaml for registry name and image credentials:
    - a. registry: <local registry url>
    - b. username: <local registry username>
    - c. password: <local registry password>
  - Install.
    - a. Follow the instructions below.
- Run the HELM upgrade command:

helm upgrade -f values.yaml dct-services delphix-dct

## 5.2.4.2 Factory reset DCT for OpenShift

To clean DCT installation run following command:

<sup>96</sup> https://download.delphix.com/file/12747/delphix-dct-9.0.0.tar.gz

<sup>97</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

helm delete dct-services

A

This process will delete both services pod and database.

# 5.3 Virtual appliance (OVA image)

DCT can now be deployed as a virtual appliance, installed via an OVA image file. This method provides an alternate option from the standard method of deploying DCT as a containerized engine via Kubernetes or OpenShift.

- Requirements and prerequisites (OVA) (see page 115)
- Installation and setup (OVA) (see page 116)

## 5.3.1 Requirements and prerequisites (OVA)

### 5.3.1.1 Technical requirements

This DCT deployment method is distributed as a virtual machine image on both AWS (AMI-not available on the AWS Marketplace or GovCloud) and ESX (OVA) hypervisors.

The minimum requirements are:

- 4 vCPU
- 16GB RAM
- 128GB (system disk) + 50GB disk (metadata volume)

### 5.3.1.2 Supported platforms

#### 5.3.1.2.1 AWS

Any AWS instance type satisfying the above requirements is acceptable.

#### 5.3.1.2.2 ESX

The following versions are acceptable.

- VMware Cloud
- VMware ESXi 8.0, 8.0 U1
- VMware ESXi 7.0, 7.0 U1, 7.0 U2, 7.0 U3
- VMware ESXi 8.0, 8.0 U1, 8.0 U2, 8.0 U3

## 5.3.2 Installation and setup (OVA)

The process for deploying DCT Appliance involves downloading an OVA image file and installing it. The OVA file or link to the AMI can be found on the Delphix downloads<sup>98</sup> site, under the **DCT Appliance** folder of the **DCT** area (not in the *Delphix Engines* area).

Delphix Download	Support L	Jpload A	Admin 👻	
Home / Delphix Product Releases /	DCT			
				•
& Delphix 🕲 Release Team 🚠				
DCT Appliance	<b>H</b>			۲

You must then use the VM console and wait for the Delphix Management Service and Delphix DCT Service (new) to come online, which can take up to 30 minutes:

[	оĸ	]	Finished Execute cloud user/final scripts.
Γ	ОК	]	Reached target Cloud-init target.
Γ	ОК	]	Started Delphix Perfomance Statistics.
Γ	ОК	]	Started Delphix default PostgreSQL database server.
Γ	ОК	]	Stopped Wait for Network to be Configured.
			Stopping Wait for Network to be Configured
			Stopping Network Service
Γ	ОК	]	Stopped Network Service.
			Starting Network Service
Γ	ОК	]	Started Network Service.
Γ	ОК	]	Started <b>ntp-systemd-netif.service</b> .
			Starting Wait for Network to be Configured
Γ	ОК	]	Finished Wait for Network to be Configured.
Γ	ОК	]	Started ntp-systemd-netif.service.
			Starting Hostname Service
Γ	ОК	]	Started Hostname Service.
Γ	ОК	]	Started Docker Application Container Engine.
			Starting <b>Delphix DCT service</b>
			Starting <b>Delphix management service</b>
I			is a standard standard and a standard

Use a supported web browser to access the DCT address and enter the default sysadmin credentials when prompted:

- Username: sysadmin
- Password: sysadmin

On the first login, there will be a prompt to change the default password for security purposes.

<sup>98</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

Control Tower S	
Welcome	Welcome
Administrators	This wizard will step you through the setup. During this process you will complete the following:
Time	<ul> <li>Create your password for the default "sysadmin" user</li> <li>Set the system time</li> <li>Configure network and services</li> <li>Configure the storage pool</li> </ul>
Network	Configure roxies, SMTP, and LDAP (these are optional)     Register your software
Network Security	After setup is complete, you will have two administrators defined: • The system administrator, "sysadmin" with the password you defined. This will be the system administrator for the instance.
Storage	<ul> <li>The DCT bootstrap account is created during the setup process and assigned an API key. This account is the starting point for initiating and administering Data Control Tower (DCT).</li> </ul>
Registration	When setup is complete, log in as engine administrator to begin using your engine.

When the setup starts, a **Welcome** screen shows text detailing the DCT setup process:

On the next page, you must choose a password for the sysadmin user and enter an email address. You will also need to copy and save a DCT bootstrap API key, which replaces the need to obtain a bootstrap API key from the Docker-Compose/Kubernetes logs for existing DCT form factors<sup>99</sup>.

<sup>99</sup> https://dct.delphix.com/docs/latest/bootstrapping-api-keys

	Welcome	Administrators	
•	Administrators		inistrator accounts: " <b>sysadmin" with a password that you</b> e system administrator for the instance.
	Time	<ul> <li>The DCT bootstrap accourt</li> </ul>	nt has been created and the API key is bunt is the starting point for initiating and
	Network	On this screen you will set up the entering an email address and pa	sysadmin and admin accounts by ssword.
	Network Security	SYSTEM ADMINISTRATOR	DCT BOOTSTRAP ACCOUNT
	Storage	System Administrator ⑦ sysadmin	API Key 1.oRNm8HsHG8j1GFkHyPV{
	Registration	Email Address	
	Summary	Email Address is required.	
		Password Password is required.	
		Confirm Password	

After initial setup, you will have the ability to re-generate a bootstrap API key via the server setup screen.

Navigate through the **Time**, **Network**, **Network Security**, **Storage**, and **Registration** sections and apply your configurations:

In the Network Security page, the KeyStore/HTTPs configuration must be used to configure the TLS certificate of the inbound HTTPs interface (nginx) of the DCT appliance. This replaces the need to configure an ingress<sup>100</sup> for Kubernetes deployments.

The Trust Store configuration can be used to configure certificate authorities that DCT should trust when verifying TLS connections to Engines or Hyperscale orchestrators, which will be connected to the DCT appliance. This replaces the manual edits to values.yaml<sup>101</sup> for Kubernetes deployments.

T

<sup>100</sup> https://dct.delphix.com/docs/latest/ingress-setup

<sup>101</sup> https://dct.delphix.com/docs/latest/engines-connecting-authenticating#id-(21.0.0)Engines:connecting/ authenticating-TruststoreforHTTPS

The DSP and STUNNEL SERVER sections can be ignored for DCT.

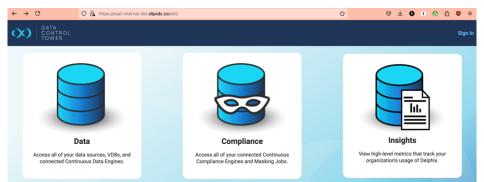
 Note on the Storage page, use of Object Storage for DCT Engines is not supported. Block storage disks will be used to store both the Management Service metadata (very minimal) and DCT metadata. A minimum of 50GB of storage is recommended (but the enforced minimum is lower).

Sections irrelevant to DCT are not shown. Configuration of phone home, SAML/SSO, LDAP reside in the DCT application itself (accessible post setup) and not in the server setup.

Users then review the Summary screen and click Submit, which configures DCT appliance and restarts the applications.

$(\mathbf{X})$	SETUP		≡
		Updating network authorization services	

Post restart, browsers are redirected to the DCT UI application, which runs exclusively on HTTPs (HTTP redirects to HTTPs) under the **/dct** prefix. For example, https://<engine-url>/dct (see page 116).



You can log in using the Bootstrap API key retrieved during initial setup, via the sign-in and API Key hyperlinks. Another option is to regenerate a new Bootstrap API key via the Setup app; a hyperlink to the Setup app is shown on the DCT login screen and vice versa.

Authorize with API Key		SETUP
If you have an API key you can use that to authenticate or alternatively use your <u>username and password</u> .		Username sysadmin
API Key API Key is required.		Password
Authorize		Data Control Tower Log In

Post login, the DCT UI and API experience is similar to the DCT engine UI via Kubernetes and OpenShift.

CONTROL TOWER	Home Data	Compliance Insi	ghts <u>Admin</u>		<b>@</b>	Bootstrap Ad	min 🖰
Accounts	Accoun	Its				+ Acc	ount
Access Groups		ints that can access D	ata Control Towar				_
Roles	Manage accou	ints that can access b	ata control rowel.				
Authentication						Search	
Operations	Search					(All)	~
	ID	Username	Name	Email	Tags		
	1	Bootstrap Ad			Add Tags	View	>
					1 to 1 of 1	Page 1 of 1	>

DCT accounts, roles, authentication, etc. is managed via the DCT UI, while sysadmin authentication, TrustStore/KeyStore, engine registration, network, and storage can be configured via the Setup UI, as well as regenerating a DCT bootstrap API key (in case admin access to DCT has been lost).

SETUP Dashboard Preferences S	Support Bundle Help	
Dashboard		
Software Version  View	Storage 0	Modify
Engine Current Version 28.0.0.9-snapshot.20240920203112147+jenkins-ops- appliance-build-develop-post-push-2283 Build Date Sep 21, 2024 2:51:53 AM Latest Version 28.0.0.9-snapshot.20240920203112147+jenkins-ops- appliance-build-develop-post-push-2283	Object Storage for Data       Disabled       Block Storage       Enabled       Disabled       Name ▲ Size       xvdb     8.00GB	24.00GE 24.00GE 0.00E Enabled Yes
Users 0	xvdc 8.00GB	Yes
+ ► ✓ ¥ Username Email sysadmin asdf@asdf.com	Network  Network Interface br-1c5fd6c3d476	Modiț
DCT Bootstrap Account Regenerate Api Key	Interface Configured Yes MTU 1500 IP Address Type STATIC IP Address	

### 5.3.2.1 Limitations

The "Software version" component of the setup app is currently reporting the "Appliance version" on top of which DCT is built—**not** the DCT Engine version. Multiple DCT Engines versions may (in the future) be built on top of the same appliance version; but at present, this number is not a good characterization of the DCT Engine version. There is an RFE filed to include the DCT Engine version as well.

# 5.4 Helm chart configuration (Kubernetes and OpenShift)

In order to support the deployment of multiple DCT instances in the same namespace or project, Helm charts must be made configurable to make resources (i.e. services, deployments, and pods) unique to that deployment. A suffix ( nameSuffix ) is provided during deployment to avoid resource name collision.

An example scenario where this might be necessary is if DCT version 15.0.0 were deployed in the dctservices namespace and you want to deploy another DCT instance of the same version or higher in the same namespace. The version 15.0.0 instance could have a nameSuffix like v15, while the 16.0.0 instance could have a suffix of v16, thus preventing a name collision. This feature works for internal and external database deployment models. If you are using an external database, then before deploying DCT with a suffix, the databases for all DCT services must be created with the same suffix:

- appv15
- bookmarksv15
- data-libraryv15
- jobsv15
- virtualizationv15
- maskingv15

### 5.4.1 Feature limitations

Deployments with a nameSuffix are only applicable for fresh deployments or upgrades to futures version releases of deployments with the same suffix.

### 5.4.2 Helm chart configuration

Deploying DCT with resource names appended with a suffix, resources must be made specific to that deployment. Use the option provided in the **vaules.yaml** to pass the nameSuffix to resources as follows:

nameSuffix:v15

If there is a need to deploy multiple instances of DCT in the same namespace or project, set nameSuffix to a string that will not conflict with the resources from each deployment.

If you are enabling multiple instance deployment in the same namespace, first you must create namespace or project before the deployment of DCT and set useExistingNamespace to true in the values.yaml for both deployments.

For multiple instance deployments in the same namespace, create a namespace or project separately to avoid the uninstallation of other DCT instances. If the namespace was not created manually, the helm installation will create the Namespace during the deployment of **Instance-1**. In this scenario, whenever **Instance-1** will be uninstalled, the namespace will be deleted and all other resources (like **Instance-2**) will also be removed. Use this command to create a namespace manually:

\$ kubectl create namespace dct-services

Once nameSuffix is configured in values.yaml, it gets appended to the resources of that deployment.

To deploy another instance of DCT in the same namespace, provide another nameSuffix string (i.e. **v16**) so the resources for the this deployment are associated with it. In the additional deployment(s), you must set the useExistingNamespace value to true:

useExistingNamespace:true

### 5.4.3 Accessing deployed DCT instances

To access deployed instances of DCT, you must create ingress routes for requests to the appropriate deployment. The ingress configuration depends on user deployment, but the following example could be used as reference.

#### 5.4.3.1 Example

Two DCT instances are deployed with their respective nameSuffix configured to **v15** and **v16**. To access them, two ingress route configurations similar to the following would be needed.

Ingress route one

```
apiVersion: networking.k8s.io/v1
kind: Ingress
metadata:
  name: https-ingressv15
  namespace: dct-services
  annotations:
    nginx.ingress.kubernetes.io/backend-protocol: "HTTPS"
spec:
  rules:
    - host: v15.dct.com
      http:
        paths:
          - path: /
            pathType: Prefix
            backend:
              service:
                name: proxyv15
                port:
                  number: 443
```

Ingress route two

apiVersion: networking.k8s.io/v1
kind: Ingress

```
metadata:
    name: https-ingressv16
    namespace: dct-services
    annotations:
        nginx.ingress.kubernetes.io/backend-protocol: "HTTPS"
spec:
    rules:
        - host: v16.dct.com
        http:
            paths:
            - path: /
            paths: Prefix
```

After creating the ingress configurations, **v15.dct.com** and **v16.dct.com** would then be added in the host file so the deployed DCT instance can be accessed by corresponding URLs.

# 5.5 Engines: connecting/authenticating

## 5.5.1 Introduction

After DCT Authentication is complete, the HTTPS should be securely configured on DCT and able to be authenticated against. The next step is to register an engine with DCT so that it can fetch results. DCT connects to all engines over HTTPS, thus some configurations might be required to ensure it can communicate successfully.

## 5.5.2 TrustStore for HTTPS

## 5.5.2.1 For virtual appliance (OVA) deployments

If you are using the virtual appliance (OVA) deployment method, follow the server setup instructions outlined in TrustStore settings<sup>102</sup>.

## 5.5.2.2 For Kubernetes and OpenShift deployments

If the CA certificate that signed the engine's HTTPS certificate is not a trusted root CA certificate present in the JDK, then custom CA certificates can be provided to DCT. If these certificates are not provided, a secure HTTPS connection cannot be established and registering the engine will fail. The <code>insecure\_ssl</code> engine registration parameter can be used to bypass the check, however, this should not be used unless the risks are understood.

Get the public certificate of the CA that signed the engine's HTTPS certificate in PEM format. You may need to engage your internal corporate IT team to obtain the correct certificates. Base64 encode the certificate with:

<sup>102</sup> https://cd.delphix.com/docs/latest/truststore-settings

cat mycertfile.pem | base64 -w 0

Copy the Base64 encoded value from the previous step and configure it in the values.yaml file, under the truststoreCertificates section. The section should appear as:

```
truststoreCertificates:
<certificate_name>.crt: <base64 encode certificate string value in single line>
```

i <certificate\_name> can be any logically valid string value, for example, engine.crt.

All certificates configured in the truststoreCertificates section will be read and included in the TrustStore, which would then be used for SSL/TLS communication between DCT and the Delphix Engine.

### 5.5.3 Authentication with the Delphix Engine

All authentication with the Delphix Engine is done using the username and password of an Engine Administrator. There are two methods for storing these credentials with DCT:

- 1. Stored and encrypted on DCT itself: Credentials are saved securely within DCT.
- 2. **Retrieved from a password vault**: Credentials are fetched from an external vault. Currently, only the HashiCorp vault is supported.

Fetching the credentials from a vault is recommended for enhanced security.

#### 5.5.3.1 Adding a Compliance Engine

When adding a Continuous Compliance Engine, it is necessary to add two types of users:

- 1. Masking Administrator
- 2. Engine Administrator

If an Engine Administrator is not provided, no performance metrics can be collected by DCT.

#### 5.5.4 HashiCorp vault

There are two high-level steps to configuring a HashiCorp vault. The first is to set up authentication with the vault and register the vault. The second is to tell DCT how to get the specific engine credentials needed from that registered vault. A single vault can be used for multiple different Delphix Engines.

### 5.5.4.1 Vault authentication and registration

First, DCT needs to be able to authenticate with the vault. DCT supports the Token<sup>103</sup>, AppRole<sup>104</sup>, and TLS Certificates<sup>105</sup> authentication methods. This is done by passing a command to the HashiCorp CLI<sup>106</sup>. It is recommended to first ensure that successful authentication is done and one can retrieve the credentials with the HashiCorp CLI directly to ensure the correct commands are passed to DCT.

Adding a vault to DCT is done through API calls to the /v2/management/vaults/hashicorp endpoint.

All authentication methods require the location of the vault is provided through the env\_variables property in the POST body. For example:

```
"env_variables": {
    "VAULT_ADDR": "https://10.119.132.40:8200"
}
```

### 5.5.4.2 Token

To use the token authentication method, this needs to be included as part of the env\_variables field. The full example to register the vault would appear as:

```
curl --location --request POST 'https://<hostname>/dct/v2/management/vaults/
hashicorp' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{
    "env_variables": {
        "VAULT_TOKEN": "<your token>"
        "VAULT_TOKEN": "<your token>"
        "VAULT_ADDR": "https://10.119.132.40:8200"
    }
}'
```

A response should be received similar to the lines below:

```
{
    "id": 2,
    "env_variables": {
        "VAULT_TOKEN": "<your token>"
        "VAULT_ADDR": "https://10.119.132.40:8200"
}
```

103 https://www.vaultproject.io/docs/auth/token 104 https://www.vaultproject.io/docs/auth/approle 105 https://www.vaultproject.io/docs/auth/cert 106 https://www.vaultproject.io/docs/commands Note the id of the vault, this will be needed in the next step to register the engine.

#### 5.5.4.3 AppRole

}

To use the AppRole authentication method, this needs to be included as part the login\_command\_args field, as shown below:

```
"login_command_args":
    [ "write", "auth/approle/login", "role_id=1", "secret_id=123"]
```

The full example to register the vault would appear as:

```
curl --location --request POST 'https://<hostname>/dct/v2/management/vaults/
hashicorp' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{
    "env_variables": {
        "VAULT_ADDR": "https://10.119.132.40:8200"
    },
    "login_command_args":
        [ "write", "auth/approle/login", "role_id=1", "secret_id=123"]
}'
```

A response should be received similar to the lines below:

```
{
    "id": 2,
    "env_variables": {
        "VAULT_TOKEN": "<your token>"
        "VAULT_ADDR": "https://10.119.132.40:8200"
    }
}
```

## 5.5.5 TLS certificates

The configuration of mutual TLS authentication requires an additional step. This feature currently is NOT supported for Kubernetes deployment of DCT. This will be covered in later releases.

## 5.5.5.1 Retrieving engine credentials

Once DCT can authenticate with the vault, it needs to know how to fetch the relevant engine credentials. When registering an engine, the user will need to provide the HashiCorp CLI commands through the hashicorp\_vault\_username\_command\_args and hashicorp\_vault\_password\_command\_args parameters.

The relevant part of the engine registration payload will look like the following:

```
'{
    "hashicorp_vault_id": 1
    "hashicorp_vault_username_command_args": ["kv", "get", "-field=username", "kv-
v2/delphix-engine-secrets/engineUser"]
,
    "hashicorp_vault_password_command_args": ["kv", "get", "-field=password", "kv-
v2/delphix-engine-secrets/engineUser"]
}'
```

The hashicorp\_vault\_id will be the ID that was returned as part of the previous step. Note that the exact paths to fetch the username and password will vary depending on the exact configuration of the vault.

# 5.6 Accounts: connecting/authenticating

There are 5 supported methods for authentication; **API keys**, **Username/Password**, **LDAP/Active Directory**, **SAML/SSO**, and **OpenID Connect**. These authentication methods are detailed on the corresponding pages in this section.

DCT uses Nginx/OpenResty<sup>107</sup> as an HTTP server and a reverse proxy for the application. Using the default configuration, all connections to DCT are over HTTPS and require the user to authenticate. The Nginx/OpenResty configuration files can be edited via /etc/config bind mounts, for the proxy container to customize the HTTP server and change options (such as TLS versions).

- API keys (see page 129)
- Username/password (see page 132)
- LDAP/Active Directory (see page 136)
- SAML/SSO (see page 143)

<sup>107</sup> https://openresty.org/en/

### 5.6.1 API keys

8

API keys are the default method to authenticate with DCT. This is done by including the key in the HTTP Authorization request header<sup>108</sup> with type apk.

API keys are long-live tokens and as a result, do not automatically expire in the future. They remain valid until they are deleted or destroyed from DCT.

Assume the following is a sample key:

1.0p9PMkZO4Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWajuKcBT3

The cURL command example would appear as:

curl --header 'Authorization: apk
1.0p9PMkZ04Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWajuKcBT3'

cURL (like web browsers and other HTTP clients) will not connect to DCT over HTTPS unless a valid TLS certificate has been configured for the Nginx server. If this configuration step (see page 148) has not been performed yet and the risk is comprehended, you may disable the check in the HTTP client. For instance, this can be done with cURL using the --insecure flag.

The cURL version must be 7.43 or higher.

### 5.6.1.1 Create and manage API Keys

The initial API key created should be used to create a new admin secure key. This is done by creating a new Account entity and setting the generate\_api\_key. The "username" attribute should be the desired name to uniquely identify the account.

```
curl --location --request POST 'https://<hostname>/docs/v2/management/accounts' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk
1.0p9PMkZ04Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWajuKcBT3' \
```

<sup>108</sup> https://developer.mozilla.org/en-US/docs/Web/HTTP/Headers/Authorization

```
--data-raw '{
    "username": "secure-key",
    "generate_api_key": true
}'
```

E

If the cURL version being used is below 7.43, replace the --data-raw option with --data.

A response should be received similar to the lines below:



Now that the new and secure API key is created, the old one must be deleted for security reasons since the key appeared in the logs. To do this make the following request:

```
curl --location --request DELETE 'https://<hostname>/dct/v2/management/api-clients/
<id>' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk
2.vCfC0MnpySYZLshuxap2aZ7xqBKAnQvV7hFnobe7xuNlHS9AF2NQnV9XXw4UyET6'
```

The ID referenced above is the numeric ID of the Account. It is the integer before the period in the token. For example, the ID of 1.0p9PMkZ04... is 1.

Finally, to list all of the current Accounts, make the following request:

```
curl --location --request GET 'https://<hostname>/dct/v2/management/accounts/' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>'
```

### 5.6.1.2 API key regeneration

Non-admin user accounts now have support for regenerating the API key in DCT version 23.0.0. This can be accessed after clicking your account name in the top-right corner of the application.

DATA CONTROL TOWER	Home         Data         Compliance         Insights         Admin           Infrastructure Connections         An overview of your connected infrastructure.	Change Password + Infrastue Regenerate API Key Sign Out
	Search	Search (All) V Refresh (0 Selected)
	Name Hosts DBMS (Version) Config Engine ID Tag	s i
	No permission [ENVIRONMENT]/READ defined for this account	
		0 to 0 of 0 < Page 0 of 0 >

The following API endpoints can be utilized for this feature:

#### Regenerate

- API Endpoint: /management/accounts/api-key-regenerate
- Inputs: Old API Key
- Outputs: New API Key

## 5.6.1.3 API key expiration

Support has been implemented to rotate the API key for another user account. This action is only allowed if the user has the necessary permissions to rotate/regenerate the API key for other accounts. A running DCT instance with VDBs is required.

The following API endpoints can be utilized for this feature:

#### Regenerate

- **API Endpoint**: /management/accounts/{id}/api-key-reset
- Inputs: User account ID
- Outputs: New API key

#### **Delete API Key**

- **API Endpoint**: /management/accounts/{id}/api-key-delete
- Inputs: User account ID

DCT version 23.0.0 introduces the capability to view and edit security settings for API Key **Expiry** and **Inactive Session Timeout**. This is accessible under Admin  $\rightarrow$  Authentication tab. The following API additions are included.

The following API endpoints can be utilized for this feature:

#### **Update Properties**

- API Endpoint: /management/properties/
- · Input: Object of properties with value in seconds
- Output: Properties with updated value

#### **Get Properties**

=

- API Endpoint: /management/properties/
- Output: Properties

#### 5.6.2 Username/password

When creating an account, a username and password combination can be associated with the account (whether an API Key was generated for the account or not). To do so, specify the "username" and "password" properties in the API request, for example:

```
curl -k --location --request POST 'https://<hostname>/v2/management/accounts' \
    --header 'Content-Type: application/json' \
    --header 'Accept: application/json' \
    --header 'Authorization: apk
1.0p9PMkZ04Hgy0ezwjhX0Fi4lEKrD4pflejgqjd0pfKtywlSWR9G0fIaWajuKcBT3' \
    --data-raw '{
        "username": "some-username",
        "password": "some-password",
        "generate_api_key": false
        "is_admin": true
}'
```

The **is\_admin** property will create the account with admin privileges. Remove this property to create an account without admin privileges.

The username and password combination can then be used to login via the UI, or to fetch a temporary access token valid for 24 hours. To do so, call the 'login' API endpoint:

```
curl -k --location --request POST 'https://<hostname>/v2/login' \
    --header 'Content-Type: application/json' \
    --header 'Accept: application/json' \
    --data-raw '{
        "username": "some-username",
        "password": "some-password"
}'
```

A response should be received similar to the lines below:

```
{
    "access_token":"eyJhbGci0iJIUzI1NiJ9.eyJpc3Mi0iJhcGlndy1zZXJ2aWNlcy1hcHAiLCJzdWIi
0iI4IiwiZXhwIjoxNjYyNTUyMzI3LCJpYXQi0jE2NjI0NjU5MjcsInVzZXJuYW1lIjoic29tZS11c2VybmFtZ
SJ9.Cx_hGU9noyWS6mtK6gjsA85FTgJRQgyJizR5t_akNps",
```

```
"token_type":"Bearer",
    "expires_in":86400
}
```

T

The access token can be used as HTTP Authorization request header<sup>109</sup> with type **Bearer**.

This access token should not be confused with ApiKeys. These tokens are short lived tokens and expire at the end of 24 hours.

A cURL example using the access token retrieved above would appear as:

```
curl --header 'Authorization: Bearer
eyJhbGci0iJIUzI1NiJ9.eyJpc3Mi0iJhcGlndy1zZXJ2aWNlcy1hcHAiLCJzdWIi0iI4IiwiZXhwIjoxNjYy
NTUyMzI3LCJpYXQi0jE2NjI0NjU5MjcsInVzZXJuYW1lIjoic29tZS11c2VybmFtZSJ9.Cx_hGU9noyWS6mtK
6gjsA85FTgJRQgyJizR5t_akNps'
```

The password for an account can be updated with the **change\_password** API endpoint, passing in both the old and new passwords, such as in this example:

```
curl -k --location --request POST '<hostname>/v2/management/accounts/3/
change_password \
    --header 'Content-Type: application/json' \
    --header 'Accept: application/json' \
    --header 'Authorization: Bearer
eyJhbGci0iJIUzI1NiJ9.eyJpc3Mi0iJhcGlndy1zZXJ2aWNlcy1hcHAiLCJzdWIi0iI4IiwiZXhwIjoxNjYy
NTUyMzI3LCJpYXQi0jE2NjI0NjU5MjcsInVzZXJuYW1lIjoic29tZS11c2VybmFtZSJ9.Cx_hGU9noyWS6mtK
6gjsA85FTgJRQgyJizR5t_akNps' \
    --data-raw '{
        "old_password": "some-password",
        "new_password": "new-password"
}'
```

Following security best practices, the password is not stored on DCT and cannot be retrieved. If the password has been lost, an account with admin privilege can reset the password for a particular account. It is recommended to change the password reset by an admin account on the first login, or with the **change\_password** API, as described above.

```
curl -k --location --request POST '<hostname>/v2/management/accounts/2/
password_reset' \
    --header 'Content-Type: application/json' \
    --header 'Accept: application/json' \
    --header 'Authorization: Bearer
eyJhbGci0iJIUzI1NiJ9.eyJpc3Mi0iJhcGlndy1zZXJ2aWNlcy1hcHAiLCJzdWIi0iI4IiwiZXhwIjoxNjYy
```

<sup>109</sup> https://developer.mozilla.org/en-US/docs/Web/HTTP/Headers/Authorization

```
NTUyMzI3LCJpYXQi0jE2NjI0NjU5MjcsInVzZXJuYW1lIjoic29tZS11c2VybmFtZSJ9.Cx_hGU9noyWS6mtK
6gjsA85FTgJRQgyJizR5t_akNps' \
    --data-raw '{
        "new_password": "new-password"
}'
```

In the above example, the admin is resetting the password of an account with id 2 to "new-password".

## 5.6.2.1 Password policies

The password policy feature allows users to enable and customize the password policy enforced for local username/password authentication (does not apply to LDAP/Active Directory or SAML/SSO based authentication).

## 5.6.2.2 Understanding password policies

The password policy is a set of requirements that local passwords must satisfy:

Property	Default value	Description
min_length	15	A password must be longer than this length.
reuse_disallow_limit	2	The user should not reuse old passwords. This tells the number of last used passwords disallowed to be reused as the new passwords.
uppercase_letter	true	A password must have at least one capital letter.
lowercase_letter	true	A password must have at least one lower case letter.
digit	true	A password must have at least one digit
special_character	true	A password must have at least one special character, such as #, \$, !
disallow_username_as_password	true	A password should not be the same as the user name.

Property	Default value	Description
maximum_password_attempts	5	The number of allowed attempts for incorrect password, after which the account gets locked.

## 5.6.2.3 Changing the password policy

To change the current password policy, call the password policy API endpoint, as shown in the example below:

```
curl --location --request PATCH 'https://<hostname>/v2/management/accounts/password-
policies' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{
    "enabled": true,
    "maximum_password_attempts": 2,
    "min_length": 5,
    "reuse_disallow_limit": 3,
    "digit": true,
    "uppercase_letter": true,
    "lowercase_letter": true,
    "special_character": true,
    "disallow_username_as_password": true
}'
```

Changing the password policy does not affect existing passwords.

## 5.6.2.4 Disabling local username/password authentication

Username/password authentication (with passwords locally in DCT) can be disabled for individual accounts by not setting or unsetting their password property, or across the DCT instance using the global properties API. Disable username/password authentication to force authentication to use an alternate authentication method (LDAP/Active Directory, SAML/SSO, etc.) as shown in this example:

```
curl --location --request PATCH 'https://<hostname>/v2/management/properties' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{"disable_username_password": true}'
```

## 5.6.3 LDAP/Active Directory

## 5.6.3.1 Configuration

LDAP/Active directory can be used to authenticate login requests, and optionally to retrieve additional information about accounts, thereafter referred to as LDAP Search.

### 5.6.3.1.1 Configuring authentication

The following attributes must be set to configure LDAP/Active Directory authentication.

Property Name	Description
enabled	Whether the LDAP/Active Directory feature is enabled.
auto_create_users	Whether DCT must automatically create account records for successful authentication attempts using a username which does not match any accounts.
	If this is disabled, an administrator must create a DCT account with an Idap_principal attribute matching the value from the LDAP/Active Directory server prior to the first login attempt.
	If this is enabled, any user with valid credentials in the LDAP/Active Directory server can authenticate to DCT, by default with an empty authorization set (i.e not being able to view any data or perform any action).
hostname	The host name or IP address of the LDAP/Active Directory server.
port	Port of the LDAP/Active Directory server. This is usually 389 for non SSL, and 636 for SSL.
enable_ssl	Whether the connection to the LDAP/Active Directory server must be performed over SSL. It is highly advised to use SSL. Without SSL, communication between DCT and the LDAP/Active server can be intercepted.

Property Name	Description	
insecure_ssl, unsafe_ssl_hostname_check, truststore_filename, truststore_password	The SSL protocol requires the LDAP/Active Directory server to expose a certificate signed by a Certificate Authority (CA) trusted by the JDK which is running DCT. Refer to the dedicated section below to see how to configure an Active Directory/ LDAP server of which certificate is not recognized.	
[domains].msad_domain_name	Microsoft Active Directory only: The DNS name of a domain in the same forest as the accounts which login. DCT will append the msad_domain_name to the username provided at login to form a user principal name (UPN).	
	Example: if the msad_domain_name is http:// mycompany.co and a user logs in with username john, DCT will perform an LDAP request to the Active Directory server to authenticate john@mycompany.co <sup>110</sup> .	
[domains].username_pattern	If the LDAP server is not Microsoft Active Directory, the username_pattern is used to create a DN string for user authentication. The pattern argument {0} is replaced with the username at runtime.	
	Example: If the username_pattern is <b>uid={0},ou=People</b> and a user logs in with username john, DCT will perform an LDAP request with DN <b>uid=john,ou=People</b> .	

The LDAP/Active Directory Integration can be configured both via DCT UI and API. The below image shows an example of how the configuration can be set in the UI as a way to Authenticate users, auto create new users, as well as map group attributes for authorization within the DCT Access Control system.

<sup>110</sup> mailto:john@mycompany.co

Edit LDAP Settings		
Z Enabled		
Auto-create Users		
Hostname activedirectory.acme.com		
Port		
636		
Domains		
MSAD Domain Name		+
acme.com		
Username Pattern		
Search Base CN=Users,DC=acme,DC=com		
Group Attribute		
department		
Email Attribute mail		+ 1
First Name Attribute		
givenName		
Last Name Attribute		
sn		
Object Class Attribute		
person		
Search Attribute SAMAccountName		
	ancel	Save

The following example requests enable LDAP authentication over SSL with an Active Directory server at address **activedirectory.company.co** using the **us.company.co** domain:

curl --location --request PUT 'https://<hostname>/v2/management/ldap-config' \

```
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{
  "enabled": true,
  "auto_create_users": true,
  "hostname": "activedirectory.company.co",
  "enable_ssl": true,
  "port": 636,
  "domains":[{
    "msad_domain_name":"us.company.co"
}]
}'
```

#### 5.6.3.1.2 Validating the configuration

=

Updating the LDAP/Active Directory configuration does not guarantee that the provided values are correct, as validating those requires a user to authenticate to DCT. This can be achieved with the ldap-config/validate API endpoints, using the credentials valid for the LDAP/Active Directory server. When provided with a username/password combination, the ldap-config/validate API endpoint will authenticate with the LDAP server. If the response status code is 200, the configuration is correct. Otherwise, the response code will be 400, and the response body will provide information to resolve the configuration problems. For example:

```
curl --location --request POST 'https://<hostname>/v2/management/ldap-config/
validate' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{
"username": "<ldap-username>",
"password": "<ldap-password>"
}'
```

Because of a defect in version 3.0.0 of DCT, the above request might fail with a response similar to:

```
search failed for john.doe with search base null' ,search attribute
'null'
```

This indicates that authentication works, and search (see below) is not configured.

#### 5.6.3.1.3 Login

Once the configuration has been updated, accounts can login (via the UI or API) using the same UI form/API endpoint they would be using for the local username/password authentication feature. For example:

```
curl -k --location --request POST 'https://<hostname>/v2/login' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--data-raw '{
    "username": "<ldap-username>",
    "password": "<ldap-password>"
}'
```

When LDAP/Active directory is enabled, DCT first attempts to validate passwords with the LDAP/Active Directory server, and falls back to local password authentication in case of failure. Enabling LDAP/Active directory is thus a non disruptive operation for existing accounts.

In order to force a transition to LDAP/Active Directory only password authentication, the DCT administrator must either update the account records to remove the password, or disable local password authentication entirely.

### 5.6.3.2 Configure LDAP/Active Directory groups

In addition to being an authentication method, the LDAP/Active Directory integration can optionally also be used to retrieve additional attributes about the accounts authenticating: first name, last name, email address and group membership.

DCT only supports retrieving groups which are exposed as an attribute of the LDAP/Active Directory user record. DCT can not fetch groups membership from group records at the LDAP/Active Directory, and thus also does not support nested groups.

Group memberships are retrieved at authentication time, using the account credentials. DCT does not need credentials of an LDAP/Active Directory administrator, but will only be able to retrieve group memberships if LDAP/Active Directory users have the right to read the corresponding attribute.

This can be enabled by setting additional arguments to the domain API object.

	1
search_base	The Context name in which to search. Being specific enables faster LDAP search.
	To construct the search_base DN string according to your LDAP/Active Directory server, using an LDAP browser, navigate to a user, and then construct the search_base DN in reverse order from the User, up the folder hierarchy. For example:
	If a User DN is:
	CN=some-user- id,CN=Users,DC=mycompany,DC=co
	The corresponding search base might be:
	CN=Users,DC=mycompany,DC=co
email_attr	Name of the attribute in the LDAP/Active Directory server containing email addresses. Example: <b>mail</b>
last_name_attr	Name of the attribute in the LDAP/Active Directory server containing last names Example: <b>sn</b>
first_name_attr	Name of the attribute in the LDAP/Active Directory server containing first names Example: <b>givenName</b>
group_attr	Name of the attribute in the LDAP/Active Directory server containing group(s) membership. This can be a multi-valued attribute. Example: <b>memberOf</b>
	· · · · · · · · · · · · · · · · · · ·
search_attr	Name of the attribute in the LDAP/Active Directory server of which value corresponds to the username provided to the DCT login requests.
	For Active Directory, this is usually <b>sAMAccountName</b> .
	Example: If the search base is <b>CN=Users,DC=mycompany,DC=co</b> and the search_attr is <b>principalName</b> , DCT will search for a record with a principalName matching the username provided to the login request under the <b>CN=Users,DC=mycompany,DC=co</b> sub tree.

object_class_attr	Restricts search to records with an objectClass matching this value.
	Example: <b>person</b>

#### 5.6.3.2.1 Active Directory example

The following requests enable LDAP authentication over SSL with an Active Directory server at address **activedirectory.company.co**, using the **us.company.co** domain, and configures optional attributes to retrieve first name, last name, email address, and group membership from the users sub-tree.

```
curl --location --request PUT 'https://<hostname>/v2/management/ldap-config' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{
"enabled": true,
"auto_create_users": true,
"hostname": "activedirectory.mycompany.co",
"enable_ssl": true,
"port": 636,
"domains":[{
   "msad_domain_name":"mycompany.co",
  "search_base":"CN=Users,DC=mycompany,DC=co",
  "email_attr": "mail",
   "first_name_attr": "givenName",
  "last_name_attr": "sn",
  "group_attr": "memberOf",
  "object_class_attr":"person",
  "search_attr": "sAMAccountName"
}]
}'
```

With the above config, when a user logs in with username John, DCT will:

- 1. Authenticate with the Active Directory server using the user principal name john@mycompany.co<sup>111</sup> and supplied password.
- 2. Search in the CN=Users,DC=mycompany,DC=co sub tree a record with objectClass=person and sAMAccountName=john.
- 3. Create or update a DCT Account record with the attributes extracted from the Active Directory server.
- 4. For each group membership found in the memberOf of the Active Directory server, an account tag is created with **key=login\_groups** and value is the group name. These tags are protected (i.e cannot be modified within DCT) and can be securely used to control access groups membership.

<sup>111</sup> mailto:john@mycompany.co

As explained above, the **ldap-config/validate** API endpoint can be used to validate that each of the attributes corresponding to LDAP/Active Directory attributes.

## 5.6.4 SAML/SSO

## 5.6.4.1 General points

- The SAML 2.0 protocol allows DCT to delegate authentication to a SAML 2.0 compatible Identity Provider (Active Directory Federation Services, Azure Active Directory, PingFederate, Okta, OneLogin, etc.) and only applies to web browser-based interaction. It cannot be used for API access (scripting, integration).
- Setting up SAML/SSO requires configuration changes both in the Identity Provider and DCT for trust to be established across both products.
- When using SAML/SSO, DCT will uniquely identify accounts by email address. With that, make sure records at the identity provider are configured with a unique email address.
- DCT supports automatic account creation (or "just in time" account provisioning) when using SAML/ SSO. When automatic account creation is enabled, accounts are created automatically when users login for the first time.
- DCT allows group membership to be retrieved from the Identity Provider, which can be used to control access control authorization within DCT via DCT Access Groups. Using Identity Provider group membership allows DCT authorization to be managed per account group and guarantees that authorizations in DCT reflect the organization structure, which is expressed by group membership of the identity provider.
- SAML/SSO is not mutually exclusive with other authentication methods, so enabling SAML/SSO is not disruptive (accounts configured with local password or LDAP/Active Directory authentication can still authenticate).
  - In order to switch to SAML/SSO exclusively as an authentication method for web browser interaction, perform the SAML/SSO configuration steps below and disable LDAP/Active Directory and Username/Password authentication. API Key-based authentication cannot be entirely disabled and only administrators can create accounts with API keys.

## 5.6.4.2 Identity provider setup

Require that an administrator of the Identity provider used by your organization sets up a SAML 2.0 integration with DCT (an integration is sometimes called a Relying party trust, or an application).

The exact instructions are product specific, but the following input values must be provided:

Name	Alternate names (depending on the product)	Value
Single Sign-on URL	<ul> <li>SAML Assertion Consumer Service</li> <li>ACS</li> <li>Recipient URL</li> <li>Destination URL</li> <li>Relying party SAML 2.0 SSO</li> <li>Service URL</li> <li>Reply URL</li> </ul>	<ul> <li>Container-based installs: https://<dct-hostname>/v2/saml/SSO</dct-hostname></li> <li>Engine-based installs: https://<dct-hostname>/dct/v2/saml/SSO</dct-hostname></li> </ul>
Audience URI	<ul> <li>SP Entity ID</li> <li>Relying Party trust identifier</li> </ul>	Any value can be selected, as long as the same value is set in the Identify Provider configuration and DCT configuration. We recommend: https:// <dct-hostname></dct-hostname>
Binding	• POST	
Protocol		SAML 2.0 WebSSO protocol

The identity provider must be configured to include the email address as NameId attribute, and DCT will use the email attribute as a unique identifier for users when connecting via SAML/SSO.

## 5.6.4.3 DCT SAML/SSO setup

Once the configuration has been performed at the Identity provider, use the saml-config API endpoint to configure DCT accordingly. Copy the metadata from the Identity Provider using a web browser and provide it directly to DCT.

The Identity provider (IDP) metadata is a standardized XML document providing the SAML Service Provider (DCT) with the necessary information to verify the validity of incoming login requests and initiate a SAML/SSO login flow.

If auto\_create\_users is enabled, DCT will create accounts automatically when they login with SAML/ SSO for the first time. If this is disabled, an administrator must create a DCT account with an email attribute matching the value from the SAML/SSO Identity provider before they can login. When

auto\_create\_users is enabled, any user configured to authenticate via the Identity provider can authenticate to DCT, by default with an empty authorization set (i.e not being able to view any data or perform any action).

Without network access, provide the IDP metadata directly:

```
curl --location --request PUT 'https://<hostname>/v2/management/saml-config' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{
    "enabled": true,
    "auto_create_users": true,
    "metadata": "<json-escaped-idp-metata-xml-blob>",
}'
```

The IDP metadata must be JSON escaped. On a terminal with ./jq<sup>112</sup> installed, this can be achieved with the following command: jq --slurp --raw-input <<< 'xml-metadata-here'</p>

## 5.6.4.4 Login

The SAML 2.0 protocol defines two login procedures: The Service Provider initiated flow starts by having users point their web browser to https://<dct-hostname>/v2/saml/login to login, while the Identity provider-initiated flow starts at the Identity provider (details specific to Identity provider vendor). DCT supports both flows. The SAML/SSO authentication method is not intended for API interaction and cannot be used with the Swagger UI.

After successful authentication, the web browser is redirected to the UI landing page. Use the navigation bar at the top to go to the desired page. The session expires 24 hours after login.

## 5.6.4.5 Troubleshooting

#### There was an issue in SAML authentication: The assertion cannot be used before <timestamp>.

The above error message, which is accompanied by com.coveo.saml.SamlException: The assertion
cannot be used before <timestamp> error in the application logs, indicates that DCT was not able to
validate the timestamp of the authentication provided by the Identity Provider. This is usually due to
the system clock of the machine running DCT being incorrectly configured. Consider using NTP to
maintain the machine's clock up to date.

#### There was an error fetching data.

 The above error message indicates that the current account does not have permission to view the data displayed on the page. Remember that, while DCT creates accounts automatically upon login when auto\_create\_users is enabled, by default accounts are created without any authorization and thus cannot see any data. Review the section below to see how SAML/SSO group membership can be assigned automatically at account creation.

<sup>112</sup> https://stedolan.github.io/jq/

## 5.6.4.6 Attributes mapping

As explained above, the only required attribute in the SAML Response (the message sent by the Identity Provider to DCT during login) is the NameId attribute which must be configured to a unique email address.

In addition to this, DCT allows for first name, last name, and group membership attributes to be included. The first and last names attributes will be stored as properties of the account object. For each group membership found in the SAML response attribute, an account tag is created with key=login\_groups and value is the group name. These tags are protected (i.e cannot be modified within DCT) and can be securely used to control access groups membership.

In other to enable these optional attributes, update the Identity provider configuration to include them in the SAML response, and use the **saml-config** API endpoint to configure DCT with the name of the attributes configured in the Identity provider:

```
curl --location --request PUT 'https://<hostname>/v2/management/saml-config' \
--header 'Content-Type: application/json' \
--header 'Accept: application/json' \
--header 'Authorization: apk <your API key>' \
--data-raw '{
    "enabled": true,
    "auto_create_users": true,
    "metadata": "<json-escaped-idp-metata-xml-blob>",
    "first_name_attr": "http://schemas.xmlsoap.org/ws/2005/05/identity/claims/
givenname",
    "last_name_attr": "http://schemas.xmlsoap.org/ws/2005/05/identity/claims/
surname",
    "group_attr": "http://schemas.xmlsoap.org/claims/Group"
}'
```

With the above configuration, and a SAML Response as the following produced by the Identity Provider during login:

```
<?xml version="1.0" encoding="UTF-8"?>
<saml2:Assertion ID="id97923983167603821157180516" IssueInstant="2022-12-01T10:07:</pre>
12.856Z" Version="2.0"
    xmlns:saml2="urn:oasis:names:tc:SAML:2.0:assertion">
    <saml2:Issuer Format="urn:oasis:names:tc:SAML:2.0:nameid-format:entity">http:/
/www.idp-demo.com/exk1fupjwz1YcMo290h8</saml2:Issuer>
    <saml2:Subject>
        <saml2:NameID Format="urn:oasis:names:tc:SAML:1.1:nameid-</pre>
format:unspecified">john.doe@company.co</saml2:NameID>
        <saml2:SubjectConfirmation Method="urn:oasis:names:tc:SAML:2.0:cm:bearer">
            <saml2:SubjectConfirmationData NotOnOrAfter="2022-12-01T10:12:12.857Z"</pre>
 Recipient="https://localhost/v2/saml/SSO"/>
        </saml2:SubjectConfirmation>
    </saml2:Subject>
    <saml2:Conditions NotBefore="2022-12-01T10:02:12.857Z" NotOnOrAfter="2022-12-0</pre>
1T10:12:12.857Z">
        <saml2:AudienceRestriction>
            <saml2:Audience>https://dct-demo.delphix.com</saml2:Audience>
        </saml2:AudienceRestriction>
    </saml2:Conditions>
    <saml2:AuthnStatement AuthnInstant="2022-12-01T10:05:07.916Z" SessionIndex="id</pre>
1669889232855.2084756273">
        <saml2:AuthnContext>
            <saml2:AuthnContextClassRef>urn:oasis:names:tc:SAML:2.0:ac:classes:Pas
swordProtectedTransport</saml2:AuthnContextClassRef>
        </saml2:AuthnContext>
    </saml2:AuthnStatement>
    <saml2:AttributeStatement>
        <saml2:Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/
claims/givenname" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-
format:unspecified">
            <saml2:AttributeValue
                xmlns:xs="http://www.w3.org/2001/XMLSchema"
                xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs
:string">John
            </saml2:AttributeValue>
        </saml2:Attribute>
        <saml2:Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/</pre>
claims/surname" NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-
format:unspecified">
            <saml2:AttributeValue
                xmlns:xs="http://www.w3.org/2001/XMLSchema"
                xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs
:string">Doe
            </saml2:AttributeValue>
        </saml2:Attribute>
        <saml2:Attribute Name="http://schemas.xmlsoap.org/claims/Group"</pre>
 NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:unspecified">
            <saml2:AttributeValue
```

Would automatically create or update a DCT account with the following properties:

```
{
     "id": 94,
     "username": "john.doe@company.co",
     "firstName": "John",
     "lastName": "Doe",
     "email": "john.doe@company.co",
     "tags": [
         {
             "key": "login_groups",
             "value": "Dev-Team"
         },
         {
             "key": "login_groups",
             "value": "QA"
         }
     ]
    }
```

## 5.7 Replace HTTPS certificate for DCT

For DCT Appliance (OVA) deployments, use the setup UI for network settings and the pages in the Configuring network settings<sup>113</sup> section.

To enable HTTPS for all other deployment methods, DCT creates a unique self-signed certificate when starting for the first time. This certificate and private key are configured in the values.yaml file under:

```
proxy:
    crt:<certificate_value>
```

<sup>113</sup> https://cd.delphix.com/docs/latest/configuring-network-settings

key:<private\_key\_value>

To use your own certificates, these default values need to be replaced. They are Base64 encoded values of the certificate and key, respectively.

- To generate the Base64 encoded value of the certificate:
  - cat my\_cert\_file.pem | base64 -w 0
- To generate the Base64 encoded value of the key:
   cat my\_private\_key.key | base64 -w 0

Generating a new TLS certificate and private key could require the assistance of your Security or IT departments. A new key pair (public and private key) will need to be created, in addition to a certificate signing request (CSR) for that key pair. Your IT department should be able to determine the correct certificate authority (CA) to sign the CSR and produce the new certificate. The common name of the certificate should match the fully qualified domain name (FQDN) of the host, as well as the FQDN as a Subject Alternative Name (SAN).

• After changing the crt and key values in values.yaml file. Run the HELM upgrade command:

helm upgrade -f values.yaml dct-services delphix-dct

• After upgrading the helm chart, restart the proxy pod to pick the new certificates:

kubectl rollout restart deployment proxy -n dct-services

## 5.8 External database support

## 5.8.1 Overview

This feature is not available for DCT Appliance (OVA) deployments.

DCT uses a PostgreSQL database to store all the persistent data powering the application (engines, VDBS, compliance jobs, accounts, permissions, etc.). By default, a PostgreSQL container image is packaged along with the DCT application and deployed along other pods onto the Kubernetes cluster, storing its persistent data into the gwdatabase-data persistent volume.

Alternatively, DCT can be configured to use an external PostgreSQL database instead, to which DCT connects over TCP and can then run anywhere (typically outside of the Kubernetes cluster).

External database support is only available for Kubernetes and OpenShift deployments. Docker Compose installations are not eligible.

## 5.8.2 Requirements

- Database type: PostgreSQL
- Min supported version: 12.16
- Max supported version: 14.10

## 5.8.3 Setup

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## 5.8.3.1 PostgreSQL database setup

The following databases must be created prior to connecting DCT: **app, jobs, data-library, bookmarks, masking, and virtualization**.

**masking** is a newly added database for the masking service and is applicable only for release 12.0.0 and above.

**virtualization** is a newly added database for virtualization-app service and is applicable only for release 15.0.0 and above

The max\_connections setting for database server must be greater than or equal to 200.

Quotes must be used to create or connect to the **data-library** databases, since its name contains a hyphen (-). Creating the database with a different name (such as **data\_library**) will NOT work.

A PostgreSQL user must be created for DCT, with either the admin privilege or ALL privilege on the above databases. The following SQL script exemplifies the creation of required databases, granting privileges to a pre-existing dct\_user (role) user.

```
CREATE DATABASE "bookmarks";
GRANT ALL PRIVILEGES ON DATABASE "bookmarks" TO dct_user;
```

```
CREATE DATABASE "data-library";

GRANT ALL PRIVILEGES ON DATABASE "data-library" TO dct_user;

CREATE DATABASE "jobs";

GRANT ALL PRIVILEGES ON DATABASE "jobs" TO dct_user;

CREATE DATABASE "app";

GRANT ALL PRIVILEGES ON DATABASE "app" TO dct_user;

CREATE DATABASE "masking";

GRANT ALL PRIVILEGES ON DATABASE "masking" TO dct_user;

CREATE DATABASE "virtualization";

GRANT ALL PRIVILEGES ON DATABASE "virtualization" TO dct_user;
```

## 5.8.3.2 DCT setup

Edit the **values.yaml** file to set useExternalDatabase to true and also provide the dbHost, dbPort, dbUser, and dbPassword, then run the following.

helm upgrade -f values.yaml dct-services delphix-dct

Previous versions of DCT required the aforementioned properties to be base64 encoded, but the values must be plain text values, as shown in the following excerpt:

```
useExternalDatabase: true
dbHost: "database-host.company.co"
dbPort: 5432
dbUser: "dct_user"
dbPassword: "dct_user_password"
```

If the password is stored as exemplified above in the values.yaml file, make sure to store this file in a secure location. Alternatively, set the value using the --set option flag in the HELM upgrade command, as shown in the following excerpt:

helm upgrade -f values.yaml --set dbPassword=dct\_user\_password dct-services
delphix-dct

· After upgrading the HELM chart, restart the pods to pick the changes:

```
kubectl rollout restart deployment data-library -n dct-services
kubectl rollout restart deployment data-bookmarks -n dct-services
kubectl rollout restart deployment jobs -n dct-services
kubectl rollout restart deployment gateway -n dct-services
kubectl rollout restart deployment masking -n dct-services
kubectl rollout restart deployment virtualization-app -n dct-services
```

## 5.8.4 Backup and recovery

When using an external database, the gwdatabase-data persistent volume (created at default by DCT) to store database data is not used. Backing up and restoring the external database is not managed by DCT. Frequent or continuous backups are required, otherwise, DCT data will be lost.

The gateway-data, masking-data, and virtualization-app-data persistent volume must still be backed up, because it contains an encryption key, which is used to encrypt sensitive data at the application-level before being sent to the database.

A backup of the external database cannot be restored successfully without a corresponding backup of gateway-data, masking-data, and virtualization-app-data, as DCT would not be able to decrypt some of the data in the database.

The encryption key in gateway-data, masking-data, and virtualization-app-data does not change after having been initially created, so backups of it do not need to be scheduled at the same time as database backups.

### 5.8.5 External database migration or upgrade

The external database can be migrated to a different host and/or upgraded to a different version at any time, as long as the version requirements above are met. If the database is unavailable for a period of time, the DCT application will temporarily fail (internal server errors on all API calls), but will recover automatically without the need for a restart. However, in case of planned maintenance, upgrade, or migration, the following procedure should be followed:

- 1. Stop (shutdown) the DCT application.
- 2. Upgrade or migrate the database.
- 3. If necessary, set the updated database properties in values.yaml, and run helm upgrade.
- 4. Start the DCT application.

## 5.8.6 DCT upgrade

Before upgrading to a new DCT version, review the documentation to identify if the external database version is compatible. If the external database version is unknown, call the metadata-database API endpoint to get the information.

```
curl -k --location --request GET 'https://<dct-server>/v3/management/metadata-
database' \
--header 'Accept: application/json' \
--header 'Authorization: apk <api-key>'
{
  "external": false,
  "version": "14.9",
  "database_product_name": "PostgreSQL",
  "major_version": 14,
  "minor_version": 9,
 "min_supported_major_version": 12,
 "min_supported_minor_version": 16,
  "max_supported_major_version": 14,
  "max_supported_minor_version": 9,
  "compatible": true
}
```

If the version of the external database is not compatible with the requirements of the DCT version being upgraded to, follow the instructions in the **External database migration or upgrade** section above before upgrading.

The selected PostgreSQL version to upgrade to must be compatible with both the currently running DCT version and the upgrade version.

After the upgrade, verify if the external database is compatible with DCT by inspecting the compatible property of the metadata-database API endpoint (as shown above).

# 5.9 DCT data backup, recovery, and migration

This method is only applicable for Kubernetes and OpenShift.

- For Kubernetes, use the kubectl command prefix.
- For OpenShift, use the **oc** command prefix.

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For DCT Appliance (OVA) deployments, these instructions do not apply. Instead, use Hypervisorprovided compatibilities for these actions, as discussed further in the Backup solution implementation<sup>114</sup> page.

The following directions will guide you through a Data Control Tower (DCT) backup, recovery, and migration. They can be used for a "lift and shift" or a "blue-green" deployment. However, the backup and recovery steps are standardized, and can be applied in one-off scenarios as well.

This page refers to the two DCT servers as initial (source) and destination (target).

## 5.9.1 Example deployment scenarios

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An example of a "lift and shift" deployment could be:

- 1. Backup the running *initial* server pre-upgrade.
- 2. Upgrade the *initial* server to the desired version and confirm functionality.
- 3. Backup the *initial* server post-upgrade.
- 4. Install a new destination server as the same initial server's post-upgrade version.
- 5. Restore the *initial* post-upgrade backup to the *destination* server.
- 6. Restart the destination services and confirm functionality.
- 7. Shutdown the initial server or maintain it for further testing.

An example of a "blue-green" deployment could be:

- 1. Backup the running *initial* server.
- 2. Install a new destination server with the same initial server's version.
- 3. Restore the *initial* backup to the *destination* server.
- 4. Restart the destination services and confirm functionality.
- 5. Upgrade the *destination* server to the newer version and confirm functionality.
- 6. Redirect traffic to the destination server.
- 7. Shutdown the *initial* server or maintain it for a future blue-green deployment.

## 5.9.2 Prerequisites

- 1. The initial (source) DCT server is up and running.
  - a. Referred to as svr\_source in any CLI commands.
- 2. The destination (target) DCT server is installed in a separate Kubernetes cluster.

<sup>114</sup> https://cd.delphix.com/docs/latest/backup-solution-implementation

- a. It is the same version as the *initial* DCT server when the backup is taken.
- b. Referred to as svr\_target in any CLI commands.
- 3. Ability to share backup files from *initial* to *destination* environments.
- 4. Sufficient access to perform various kubectl commands on both the initial and destination clusters.

## 5.9.3 Backup instructions

Ensure the *initial* DCT server is running, to take a successful backup. Then, run the following commands:

```
kubectl cp <srv_source-gateway-pod>:/data gateway_data --namespace <srv_source-
namespace>
```

```
kubectl cp <srv_source-masking-pod>:/data masking_data --namespace <srv_source-
namespace>
```

kubectl cp <srv\_source-virtualization-app-pod>:/data virtualization\_app\_data -namespace <srv\_source-namespace>

```
kubectl exec -it <srv_source-database-pod> --namespace <srv_source-namespace> --
pg_dumpall -U postgres > postgres_db_all.sql
```

This will create four files: gateway\_data, masking\_data, virtualization\_app\_data, and postgres\_db\_all.sql:

- gateway\_data is the gateway pod's persistent volume containing encryption keys and various other configuration information.
- masking\_data is the masking pod's persistent volume containing various configuration information.
- virtualization\_app\_data is the virtualization-app pod's persistent volume containing various configuration information.
- postgres\_db\_all.sql is a complete database backup.

## 5.9.4 Restore instructions

Ensure the *destination* DCT server is running to restore successfully. In addition, make the postgres\_db\_all.sql, gateway\_data, masking\_data, and virtualization\_app\_data files available to the *destination* cluster in the subsequent steps.

Then, run the following commands:

kubectl cp gateway\_data <srv\_target-namespace>/<srv\_target-gateway-pod>:/data

kubectl cp masking\_data <srv\_target-namespace>/<srv\_target-masking-pod>:/data

kubectl cp virtualization\_app\_data <srv\_target-namespace>/<srv\_target-virtualizationapp-pod>:/data

kubectl cp postgres\_db\_all.sql <srv\_target-namespace>/<srv\_target-database-pod>:/tmp

```
for i in app bookmarks data-library jobs masking virtualization
{
    kubectl exec -it <srv_target-database-pod> --namespace <srv_target-namespace> --
psql -U postgres -c "drop database \"$i\" with (FORCE)"
}
```

```
kubectl exec -it <srv_target-database-pod> --namespace <srv_target-namespace> -- psql
-U postgres -f /tmp/postgres_db_all.sql
```

Finally, delete and restart the DCT pods:

Ξ

```
for i in `kubectl get pods --namespace <srv_target-namespace> | awk '{print $1}' |
grep -v jobs-cleaner | egrep "gateway|data-library|jobs|data-bookmarks|masking|
virtualization-app"`
{
    kubectl delete pod $i -n <srv_target-namespace>
}
```

After deleting the pods, Kubernetes will automatically recreate them and absorb the new database backup, and gateway volume data.

#### 5.9.5 Additional environment configuration

The HELM chart's values.yaml contains information specific to your environment, such as certificates, hostname, or resource limits. You can update this information before or after the migration process. The standard installation and configuration process can be followed to update these values.

# 5.10 Exporting DCT logs to Splunk

## 5.10.1 Overview

This feature is not available for DCT Appliance (OVA) deployments.

This article provides some tips for configuring DCT (running on Kubernetes) to send logs to Splunk and extract useful information in Splunk.

## 5.10.2 Setting up a Splunk instance

Authenticate with Splunk via the web portal and install the third-party Monitoring Kubernetes<sup>115</sup> app directly via the Splunk UI, then enable HTTP Event Collector in Splunk and save the HTTP Event Collector token for future use.

## 5.10.3 Enable Splunk log forwarding

Once the Splunk instance is setup, follow the instructions to install Splunk logic in the Kubernetes cluster to forward logs to Splunk. This blog post<sup>116</sup> is a useful resources to understand the log collection and configuration options.

```
git clone https://github.com/splunk/splunk-connect-for-kubernetes.git
cd splunk-connect-for-kubernetes/helm-chart/splunk-connect-for-kubernetes
edit values.yaml
```

Edit values.yaml, at the minimum the host property (hostname of the Splunk collector) and token (of the HTTP Even Collector) must be set.

```
global:
logLevel: info
splunk:
hec:
    # host is required and should be provided by user
    host: <insert-splunk-http-event-collector-hostname-here>
    # port to HEC, optional, default 8088
    port:
    # token is required and should be provided by user
```

115 https://splunkbase.splunk.com/app/3743

<sup>116</sup> https://faun.pub/logging-in-kubernetes-using-splunk-c2785948fdc0

token: <insert-token-here>

Install the helm chart and and after a few minutes DCT logs will be visible in Splunk.

```
helm install splunk-connect-for-kubernetes . -f values.yaml --set splunk-kubernetes-
logging.fullnameOverride=splunk-logging
```

## 5.10.4 Search for events in Splunk

In the Splunk Cloud UI, via the "Monitoring Kubernetes" App, you can "search" for data sent by Kubernetes, as exemplified in the screenshot below. The bootstrap API key can be found as shown.

$\leftarrow \rightarrow \mathbb{C}$ () $\triangle$ https://prd-p-h6jvj.splunkcloud.com/en-US/app/monitoringkubernetes/se $\bigtriangleup$ () $\checkmark$ ()	ເ ຍ ກ ≡
splunk>cloud Apps - Messages - Settings - Activity - 🔍 Find 🥥 👤 E	yal Kaspi 🔹 🛛 🖓 🕶
Overview Workloads - Monitoring - Top - Events Logs Cluster - Review - Security - 闷 Monito	ring Kubernetes
Setup ▼ Search Alerts Dashboards	
New Search Save As  Create Table	View Close
NEWLY Last 24	4 hours 🔻 🔍
✓ 1 event (2/5/23 9:00:00.000 AM to 2/6/23 9:46:47.000 AM)       Job ▼ □	Smart Mode ▼
Events (1) Patterns Statistics Visualization	
Format Timeline  - Zoom Out + Zoom to Selection × Deselect	1 hour per column
> Show Fields         List ▼         ✓ Format         20 Per Page ▼	
i Time Event	
> 2/6/23       NEWLY       GENERATED API KEY: 1.r2hSuye1RLY86GF1q7nPH9ngQNo20rQLzVKzPZmsVTbbdBt44qpDz1c13N8XSW0f         9:38:33.646 AM       host = docker-desktop       source = /var/log/containers/gateway-77bdbd85bc-8htfh_apigw-services_gateway-640fb         sourcetype = kube:container:gateway	

The example screenshot below shows a search for \"nginx\", with use of the "extract new fields" wizard on the bottom left, which has Splunk parse the Nginx access logs. A regexp is used to name some of the fields like ipaddress, endpoint, accountid, etc. The example runs a search to return API requests associated with accountid.

sp	lunk>cloud	Apps 🔻	Messages 🖣	Settings	Activit	y <b>-</b> Q	Find					0	👤 Eya	al Kaspi 🔻	3
0\	verview Wo	rkloads 🔻	Monitoring •	Тор 🔻	Events	Logs	Cluster 🕶	Review <del>•</del>	Security	/ -	(	Арр	Monitor	ing Kuberne	etes
Se	tup <del>-</del> Search	n Alerts	Dashboar	ds											
N	lew Searc	h								Save	e As 🔻	Crea	te Table V	/iew Clos	se
i	ndex=_* <mark>OR</mark> inde ?limit=50≻		type=kube:cor ame HTTP/1.1\		AND accour	nt!="[:]"	AND endpoint	!="\"POST /v	2/manageme	nt/account	s/search		Last 24	hours 🔻 🕻	۹
~	<b>27 events</b> (2/5/23 No Event Sampli		00 AM to 2/6/2	23 10:09:16.000	0 AM)		Job 🔻	II →	•	standard_ default) ▼	_perf (sea	rch		Smart Mod	e
F	ormat Timeline 🔻	- Zoo	m Out + 2	oom to Select	ion × [	Deselect								1 hour per col	lum
_	Show Fields	Table ▼	✓ Format	20 Per Paç								< Pre	ev 1	2 Next	>
	Show Fields _time 2/6/23 9:51:49.353 AM	Table • host \$ docker-des	enc		ge 🔻		HTTP/1.1*201					< Pre	₩ 1	2 Next account \$ [4:admin-us	>
i •	_time 2/6/23 9:51:49.353	host ≑	enc sktop "POS	20 Per Paç point ≎	ge ▼ ment/accou	unts/5/tags						< Pre	v 1	account \$	> ser
•	_time 2/6/23 9:51:49.353 AM 2/6/23 9:51:42.976	host \$	sktop "POS	20 Per Pag point \$ ST /v2/manage	ge ▼ ment/accou ment/accou	unts/5/tags unts HTTP/1	.1"201	ort/search?lim	it=15&sort=	-used_perci	entage H			account \$	> ser
> ii >	_time 2/6/23 9:51:49.353 AM 2/6/23 9:51:42.976 AM 2/6/23 9:51:35.547	host \$ docker-de: docker-de:	sktop "POS	20 Per Pag point \$ ST /v2/manage	ge ▼ ment/accou ment/accou	unts/5/tags unts HTTP/1 ion-storage	.1"201 summary-rep					TTP/1.1	"200	account ‡ [4:admin-us [4:admin-us	> ser- ser-

# 5.11 Generating a support bundle

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For DCT Appliance (OVA) deployments, use the setup UI for support logs in the Creating support logs<sup>117</sup> page.

## 5.11.1 Find the collect\_bundle.sh script

• The support bundle tar file is available on the downloads site<sup>118</sup>.

<sup>117</sup> https://cd.delphix.com/docs/latest/creating-support-logs

<sup>118</sup> https://download.delphix.com/folder/1144/Delphix%20Product%20Releases/DCT

• Once the file is downloaded, untar the file to find the script.

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```
dlpxuser@delphix:~/test$ tar -xzvf dct-support-bundle-1.0.1.tar.gz
x ./
x ./collect_bundle.sh
x ./README
x ./VERSION
```

# 5.11.2 Execute the collect\_bundle.sh script when DCT is running in Kubernetes

• Transfer the collect\_bundle.sh script to the machine where you have permissions to execute kubectl commands against the DCT pods.

You must install the bash shell to generate a DCT support bundle, if it is not already.

- Execute the collect\_bundle.sh script, which assumes a Kubernetes deployment by default. The script may need to run with sudo if root permissions are needed to run the kubectl commands.
- If the namespace is not the default "dct-services", use the -n flag and pass the correct namespace.

```
dlpxuser@delphix:~/test/tools/support-scripts/$ ./collect_bundle.sh -n
<custom_namespace>
....
DCT support bundle collection started at Thu Jun 22 12:35:05 EDT 2023
Collecting logs from all DCT containers...
....
```

## 5.11.3 Execute the collect\_bundle.sh script when DCT is running in Docker-Compose

• Transfer the collect\_bundle.sh script to the machine where you have permissions to execute docker commands against the DCT Docker-Compose application.

You must install the bash shell to generate a DCT support bundle, if it is not already.

• Execute the collect\_bundle.sh script with the -d parameter. The script may need to run with sudo if root permissions are needed to run the docker commands.

```
dlpxuser@delphix:~/test/tools/support-scripts/$ ./collect_bundle.sh -d
...
DCT support bundle collection started at Thu Jun 22 12:35:05 EDT 2023
Collecting logs from all DCT containers...
....
```

## 5.11.4 Find the generated support bundle tar file

The resulting support bundle will be located at dct-support-\*\*\*.tar.gz , inside the current directory.

```
dlpxuser@delphix:~/test$ ls -ltr
total 316
-rw-r--r-- 1 65436 staff 104189 Feb 17 08:52 dct-support-<current_timestamp>.tar.gz
```

The support bundle tar file contains the following information:

DCT logs for all of the containers.

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- A java heap dump, .hprof, if one exists.
- A java thread dump and memory stats.
- The output of **docker stats**, if running in Docker-Compose.
- The output of **cpuinfo**, **meminfo**, and **mpstat** for each container, if running in Kubernetes.
- The output of kubectl get pods -o json for each container, if running in Kubernetes.
  - The collect\_bundle.sh generates a support bundle from a DCT engine running in Docker or Kubernetes.
    - The resulting support bundle will be at ./dct-support-\*\*\*.tar.gz inside the container.
    - The user must have privileges or permission to execute the **docker** or **kubectl**, commands in order to generate the support bundle.

# 6 Data management

- DCT administration (see page 162)
- Central management workflows (see page 198)
- Insight reports (see page 233)
- Tabular data in DCT (see page 243)
- Faults, alerts, and actions in DCT (see page 244)

# 6.1 DCT administration

DCT delivers a management layer on top of all connected Delphix engines through surfacing object inventories, instrumenting all common Delphix operations, delivering a business metadata layer with tagging, and using those tags to drive attribute-based access control. This provides the ability for administrators to deliver a highly curated and secure Delphix experience for automation and end-users.

latabase	Action	Data Tags	Engineering Team Alpha
eCommerce_Customers	Provision	Network Non-Prod	
eCommerce_Payments	Refresh	Engineering Team Alpha	Central Permission
warehouse_Inventory	Teardown	Priority High	Create 🔒 Update
warehouse_catalog	Environment	Data Center West	Delete View
ERP_logistics	SRE_Environment	VDB Profile Gold Copy	Refresh Rewind
ERP_Accounts	Test_Environment	Primary Owner John Smith	
	Analytic_Environment		

This section contains configurations handled under the Admin page in the DCT interface.

## 6.1.1 Operations in DCT

The Operations page is available under the **Admin** menu, showing a comprehensive list of all the DCT Jobs across Delphix infrastructures. It only shows operations that the user has access to.

The Operations Monitoring feature allows users, such as Database Administrators (DBA), Developers, CISOs, and Database Managers, to monitor system operations related to data virtualization and masking. Users can view all operations and their statuses (completed, in progress, or error) on the Operations page.

This page will display operations based on the user's **read permission** on the associated object. Click on a specific operation to view additional details, including the related object name, the operation type, the current status, a progress indicator (if in progress), and any additional metadata related to the operation.

The Operations page is accessible from **Administration** > **Operations** or the **View All** button on the Operations Monitor Bar, which is described below.

Relevant details for the operation are shown, such as status with a graphical progress bar for running jobs, type of job, target id (refers to the id of the object on which the operation has been performed), start time, last updated time, etc. In versions 10.0.0 and above, a column shows the initiator of the operation.

Operations								
-								
Operations shows you all	the various operations and	their status across Delphi	vinfractructure					
operations shows you air	ule various operations and	their status across Deiphi	x minastructure.					
							Search	
Search							(All)	~
Status	ID	Start Time	Last Updated Time	Target Name	Туре	Initiator		
Started	9759fc6affe84e4cb3d	Jan 18, 2024 4:32 PM	Jan 18, 2024 4:33 PM	as-win-src-si	Environment Refresh		Actions	1
Completed	1660496c86f247fcb1_	Jan 18, 2024 4:24 PM	Jan 18, 2024 4:29 PM	bwtgt1	Environment Refresh		View	>
Completed	214a7ab8f5d9420f99	Jan 18, 2024 4:24 PM	Jan 18, 2024 4:25 PM	as-win-src-si	Environment Refresh		View	>
Completed	e322dd537d1640958f	Jan 18, 2024 4:20 PM	Jan 18, 2024 4:20 PM	DBOMSRB331B3	dSource Disable		View	>
Completed	8c34a9878e3a41839	Jan 18, 2024 4:13 PM	Jan 18, 2024 4:16 PM	VVSourceDB2019_UZ	VDB Provision	Account-1	View	>
Completed	79632346f15b499ea1	Jan 18, 2024 4:12 PM	Jan 18, 2024 4:12 PM	CDOMLOSR6004PDB	VDB Delete	Account-1	View	>
Failed	fa60dc504b7d4dc5b5	Jan 18, 2024 4:11 PM	Jan 18, 2024 4:11 PM	CDOMLOSR6004PDB	VDB Provision	Account-1	View	>
Failed	c7c17c123cd449298	Jan 18, 2024 4:07 PM	Jan 18, 2024 4:07 PM	DBOM_UMW	VDB Provision	Account-1	View	>
Pending	0a789ea40dec4f0e85	Jan 18, 2024 3:37 PM		Book makr 2	Bookmark Create	Account-1	Actions	i i
	<ul> <li>Started</li> <li>Completed</li> <li>Completed</li> <li>Completed</li> <li>Completed</li> <li>Completed</li> <li>Failed</li> </ul>	Status         ID           Started         9759fc6affe844cb3d           Completed         1660496c86f247fcb1           Completed         214a7ab8f5d9420f99           Completed         2322dd537d1640958f           Completed         8232dd537d1640958f           Completed         8234987863A1839           Completed         79532346f15b499ea1           Failed         fa60dc504b7d4dc5b5           Failed         fa60dc504b7d4dc5b5	Status         ID         Start Time           Image: Started         9759fc6aff684e4cb3d         Jan 18, 2024 4.32 PM           Image: Started         9759fc6aff684e4cb3d         Jan 18, 2024 4.32 PM           Image: Started         1660496c86f247fcb1         Jan 18, 2024 4.24 PM           Image: Started         214a7ab8f5694201P9         Jan 18, 2024 4.24 PM           Image: Started         214a7ab8f5694201P9         Jan 18, 2024 4.24 PM           Image: Started         632a987be3a41889         Jan 18, 2024 4.20 PM           Image: Started         8c34a987be3a41889         Jan 18, 2024 4.21 PM           Image: Started         79632346f15b499ea1         Jan 18, 2024 4.11 PM           Image: Started         fa60dc504b7d4dc8b5         Jan 18, 2024 4.11 PM           Image: Started         fa60dc504b7d4dc8b5         Jan 18, 2024 4.01 PM           Image: Started         fa60dc504b7d4dc8b5         Jan 18, 2024 4.01 PM	Status         ID         Start Time         Last Updated Time <ul></ul>	Status         ID         Start Time         Last Updated Time         Target Name                ✓ Started          9759fc6affe84e4cb3d         Jan 18, 2024 4.32 PM         Jan 18, 2024 4.33 PM         as-win-src-si                ✓ Completed          1660496c86f247fcb1         Jan 18, 2024 4.23 PM         Jan 18, 2024 4.29 PM         bwfgt1                ✓ Completed          214a7ab8f5d9420f99         Jan 18, 2024 4.24 PM         Jan 18, 2024 4.29 PM         bwfgt1                ✓ Completed          214a7ab8f5d9420f99         Jan 18, 2024 4.29 PM         Jan 18, 2024 4.20 PM         D80MSRB331B3                ✓ Completed          es32ad6537d1640958f         Jan 18, 2024 4.13 PM         Jan 18, 2024 4.16 PM         VSourceU82019_UZ                ✓ Completed          8c34a987863a41839         Jan 18, 2024 4.13 PM         Jan 18, 2024 4.16 PM         VSourceU82019_UZ                ✓ Completed          79632346f15b499ea1         Jan 18, 2024 4.11 PM         Jan 18, 2024 4.11 PM         CDOMLOSR6004PDB                ☑ Failed          fa60dc504b7d4dc565	Status         ID         Start Time         Last Updated Time         Target Name         Type           Image: Started         9759fc6affe84e4cb3d         Jan 18, 2024 4.32 PM         Jan 18, 2024 4.33 PM         as-win-src-si         Environment Refresh           Image: Completed         1660496c86f247fcb1         Jan 18, 2024 4.23 PM         Jan 18, 2024 4.29 PM         bwtg11         Environment Refresh           Image: Completed         214a7ab8fd9420f99         Jan 18, 2024 4.29 PM         Jan 18, 2024 4.29 PM         bwtg1         Environment Refresh           Image: Completed         214a7ab8fd9420f99         Jan 18, 2024 4.20 PM         Jan 18, 2024 4.20 PM         BB0MSRB331B3         dSource Disable           Image: Completed         e322dd537d1640958f         Jan 18, 2024 4.20 PM         Jan 18, 2024 4.10 PM         VSourceDB2019.UZ         VDB Provision           Image: Completed         8c34a9878c3a1839         Jan 18, 2024 4.12 PM         Jan 18, 2024 4.12 PM         VSourceDB2019.UZ         VDB Provision           Image: Completed         7e32346f15b499ea1         Jan 18, 2024 4.12 PM         Jan 18, 2024 4.11 PM         VSourceDB2019.UZ         VDB Provision           Image: Completed         fa60dc504b7d4dc5b5         Jan 18, 2024 4.11 PM         Jan 18, 2024 4.11 PM         VDB Provision	Status       ID       Start Time       Last Updated Time       Target Name       Type       Initiator         Image: Started       9759fc6aff684e4cb3d       Jan 18, 2024 4.32 PM       Jan 18, 2024 4.33 PM       as-win-src-si       Environment Refresh       Image: Name       Environment Refresh         Image: Completed       1660496c86f247fcb1L       Jan 18, 2024 4.24 PM       Jan 18, 2024 4.25 PM       se-win-src-si       Environment Refresh       Image: Name         Image: Completed       214a7ab3f5d942099       Jan 18, 2024 4.25 PM       Jan 18, 2024 4.25 PM       se-win-src-si       Environment Refresh       Image: Name         Image: Completed       214a7ab3f5d942099       Jan 18, 2024 4.25 PM       Jan 18, 2024 4.25 PM       Source Disable       Image: Name       Image:	Status       ID       Start Time       Last Updated Time       Target Name       Type       Intilator         Image: Started       9759fc6aff684e4cb3d       Jan 18, 2024 432 PM       Jan 18, 2024 433 PM       as-win-src-si       Environment Refresh       Accions         Image: Completed       1660496c88ft247fcb1       Jan 18, 2024 424 PM       Jan 18, 2024 425 PM       bwrg11       Environment Refresh       View         Image: Completed       214a7ab8f5d9420f99       Jan 18, 2024 426 PM       Jan 18, 2024 425 PM       BeoMxR831B3       dSource Diable       View         Image: Completed       6322d537d1640958ft       Jan 18, 2024 426 PM       Jan 18, 2024 426 PM       DBOMSR831B3       dSource Diable       View         Image: Completed       6322d537d1640958ft       Jan 18, 2024 413 PM       Jan 18, 2024 416 PM       View       View       View       View         Image: Completed       795523d6f15b499ea1       Jan 18, 2024 412 PM       Jan 18, 2024 412 PM       View       Vi

The capture **above** represents an **admin user** view of the Operations page.

The capture **below** represents a **non-admin user** view of the same page.

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DATA CONTRO TOWER	L Home Data Con	npliance Insights Adm	in				standard-user-1
Accounts	Operations						
Access Groups	Operations shows you all the	e various operations and their s	status across Delphix infrastru	icture.			
Roles	Search						Search (All) V
Authentication	Status	ID	Start Time	Last Updated Time	Target ID	Туре	
Operations	Completed	6c74f12010d74c2f99c63c	Jul 25, 2023 11:49 AM (As	Jul 25, 2023 11:55 AM (As	1-WINDOWS_HOST_EN	Environment Enable	View >
	Completed	7aaf617b8a1b45ae892ed	Jul 25, 2023 11:48 AM (As	Jul 25, 2023 11:49 AM (As	1-WINDOWS_HOST_EN	Environment Disable	View >
						1 to 2 of 2	< Page 1 of 1 >

Selecting a job will navigate to the Operations details page, which shows further details for that job, in addition to a progress bar. The details include target id, error, and warning logs. Continuous Data operations are the jobs initiated by the engine, as shown in the action sidebar.

The system will execute operations either manually by users or by automated tasks. If an operation encounters an error, the error details can be viewed on the Operation Details page. Notifications based on operation status changes will be covered in future brief and are not in the scope of this product brief.

CONTROL Home Data Compliance Insights Add TOWER	nin		<b>@</b>	8
Coperations > Environment Refresh   jk-target Environment Refresh   jk-target daecf743406f4ac49754363b76506903				
Job Status: STARTED			Start Time: 3:37	РМ
Total Progress: 0%				
<ul> <li>S Refresh and discover environment "jk-target".</li> </ul>		0%		
✓ ✓ Refresh environment "jk-target".		0%		•
Disable a list of datasets in environment "jk-target".				
> 🤣 Refresh hosts in environment "jk-target".		40%		
Details	Errors	Warnings		
Status Started	No error logs available.	No warning logs available.		
Type Environment Refresh				
<b>Start Time</b> Jan 17, 2024 3:37 PM GMT+5:30				
Last Updated Jan 17, 2024 3:37 PM GMT+5:30				

## 6.1.1.1 Operations Monitor Bar

The Operations Monitor Bar appears at the bottom of pages to display user-initiated operations, with those completed being auto-dismissed. Operations with errors or in progress remain until the user dismisses them from the bar. In-progress operations display the operation type and object name. By default, the Operations Monitoring Bar toggle button will be available on all pages of the application.

When logging into the application, the Operations Monitoring Bar will be hidden by default. There will be two triggers for showing it:

- Click on the icon (Operations Monitor Bar toggle button) in the top right.
- Initiate an action like VDB refresh or compliance operation execution.

The bar has a **View All** button that navigates to the full Operations page and an actions menu, represented by a vertical "more" icon, that displays available actions for that operation. Visibility of the bar can be toggled on from the "memory" icon in the top right corner.

The Operations Monitoring Bar will show the following:

- Operations initiated by the user.
- Operations initiated during the current session.
  - Initially the Operations Monitoring Bar will always be empty upon login.
- Operations marked as Monitor by the user in the full Operations page.
- Operations currently running and failed.

## 6.1.1.1.1 Additional notes

- Close and reopen the Operations Monitoring Bar as needed by using the toggle button located in the top right corner (within the top banner).
- The successfully completed operations will auto dismiss. In other words, when any operation completes, the status changes from RUNNING to COMPLETED and it will be auto-dismissed/auto-removed from the Operations Monitor Bar. For any other status, such as CANCELED, ABANDONED, FAILED, SUSPENDED, TIMEOUT etc., auto dismiss will not occur.
- Click the three-dot menu icon on any operation in the Operations Monitor Bar to **dismiss** and remove any operation from the Operations Monitor Bar by selecting this action from the
- When logging out and logging in again, the Operations Monitoring Bar will revert to being empty. The application will not retain the state of the Operations Monitoring Bar between user sessions.
- The **View All** button will navigate users to the Operations page.
- The **View Details** button will navigate users to the Details page of the specific operation.

## 6.1.2 Engine details page

This page describes the many tabs available with different insights and configurations pertaining to the connected engines in DCT. Each sub-section is the name of a corresponding tab in the Engine details page.

## 6.1.2.1 Overview

Individual engine details can be seen and acted upon by clicking down on a particular engine detailed view. Once clicked, users will be sent to an Overview tab that provides relevant metadata related to the engine. From the Actions menu, you can also Deregister an engine.

Deregistering or deleting an engine can also be done via the API with: curl --location --request DELETE '<https://<DCT Host Name>:<Port>/v3/ management/engines/<ID or Name of the Engine to be deleted>' \ --header 'Authorization: apk <api key for authentication>'

	ITROL Home Data Compliance Insi	ights Admin		© 8
< Data Engines Overview	Data Engines > Test Engine a0074d56-37b2-2d2e-3dd5-8e4b11040550 Environments dSources VE	Bs Access		Actions -
	31.8% Used Remaining Storage	6.93GB 9 14.86GB		
Details			Tags	Edit
Type Version	Data Engine 14.0.0.0			No tags added
No operations to show				View All >

## 6.1.2.2 Environments

The Environments tab presents all environment connections to that particular engine.

		Compliance Insights	Admin						8
< Infrastructure	Data Engine Test Engine 42366308-1323-71ff-e258-9c643	2ad8a2ae							
Overview	Environments	dSources	VDBs	Access					
Search								Search (All)	~
Name 个		Hosts IP (Port)		DBMS (Version)	Config	Engine ID	Tags		
Oracle_Source		10.160.1.21 10.160.1.21 10.160.1.21		Unstructured Files mysql-plugin Oracle (19.3.0.0.0)	Standalone	3	Add Tags >		
Oracle_Target		10.160.1.61 10.160.1.61 10.160.1.61		Unstructured Files mysql-plugin Oracle (19.3.0.0.0)	Standalone	3	Add Tags >		
Postgres_Source		10.160.1.20 10.160.1.20		Unstructured Files postgres-vsdk	Standalone	3	Add Tags >		
Postgres_Target		10.160.1.60 10.160.1.60		Unstructured Files postgres-vsdk	Standalone	3	Add Tags >		
Sqlserver_Source		10.160.1.22		MSSql (14.0.2027.2)	Standalone	3	Add Tags >		
Sqlserver_Target		10.160.1.62 10.160.1.62		Unstructured Files MSSql (14.0.2027.2)	Standalone	3	Add Tags >		

## 6.1.2.3 dSources

The dSources tab presents all dSources associated with the selected engine. Clicking the "View" button will link the user directly to the associated dSource page.

CONTROL Data Compliant	ce Insights Admin			Θ
Data Engine C Infrastructure Test Engine 42365306-1323-71ff-e256-9c642ad8a2ae				
Overview Environments dSour	VDBs Access			
Search				Search (All) V
Status	Name 个	Туре	Tags	
UNKNOWN	AppFS_cust_master	Unstructured Files	Add Tags >	View >
UNKNOWN	AppFS_master	Unstructured Files	Add Tags >	View >
UNKNOWN	Mysql_master	mysql-plugin	Add Tags >	View >
UNKNOWN	Oracle_master	Oracle	Add Tags >	View >
UNKNOWN	Postgres_cust_master	postgres-vsdk	Add Tags >	View >

## 6.1.2.4 VDBs

The VDBs tab presents all VDBs associated with the selected engine. Clicking the "View" button will link the user directly to the associated VDB page to take action.

CONTROL Data	Compliance Insights Admin		θ
Data Engine C Infrastructure Test Engine 42365308-1323-71ff-e258-96	042x35x2xe		
Overview Environments	dSources VDBs Access		
Search			Search (All) 🗸 🗸
Status	Name 个	Туре	Tags
RUNNING	AppFS_DEV	Unstructured Files	Add Tags > View >
UNKNOWN	AppFS_MASK	Unstructured Files	Add Tags > View >
UNKNOWN	AppFS_QA	Unstructured Files	Add Tags > View >
UNKNOWN	AppFS_cust_DEV	Unstructured Files	Add Tags > View >
UNKNOWN	AppFS_cust_MASK	Unstructured Files	Add Tags > View >

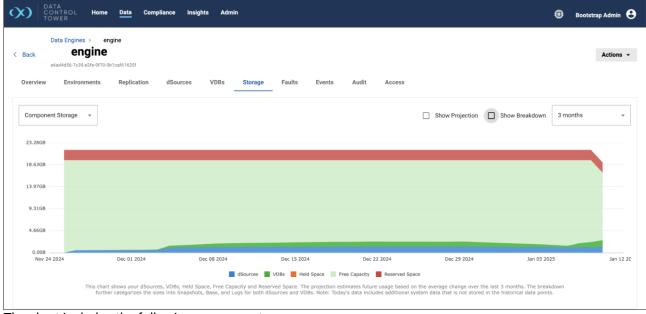
## 6.1.2.5 Storage

The Storage tab on the engine details page to provide detailed information about the space occupied by datasets on the engine. This data can be visualized using an interactive graph.

There are two ways to view this information on the graph:

#### 6.1.2.5.1 Component Storage

This option visualizes storage data using a stacked area series chart, offering a detailed breakdown of storage components on the engine. By default, the chart displays data for the last 3 months, with an option to extend the view to the last 6 months using a dropdown. This provides a comprehensive understanding of space allocation and utilization over time.



The chart includes the following components:

1. **dSources**: Represents the storage used by data sources on the engine.

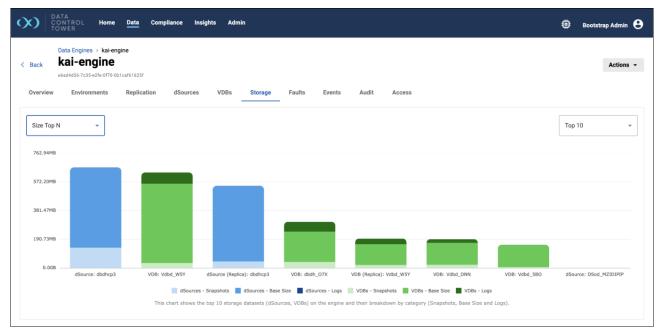
- 2. VDBs (Virtual Databases): Shows the storage utilized by virtual databases.
- 3. Held Space: Denotes space reserved or held for specific operations or recovery purposes.
- 4. Free Capacity: Indicates the remaining available storage on the engine.
- 5. **Reserved Space**: Displays the space allocated for future use or reserved for system operations.

Additionally, the chart includes the following features:

- **Show Breakdown**: A checkbox that enables further segmentation of dSources and VDBs storage into logs, base, and snapshot sizes, offering a more granular view of storage usage.
- Show Projection: A checkbox that allows users to view projected storage trends, helping in future capacity planning.

#### 6.1.2.5.2 Size Top N

This option visualizes storage data for dSources and VDBs using a stacked bar series chart. The chart displays the top 10 dSources and VDBs by default, with an option to view the top 15 datasets using a dropdown. The visualization provides a detailed breakdown of storage components, including logs, base, and snapshot sizes, allowing users to analyze and compare storage usage effectively.



#### 6.1.2.5.3 Access

Users are able to audit which users have operations access to this particular engine, what access group they belong to, and the associated permissions that each user has on this engine. Admins are able to click on the View button to access further details under the access control screen related to that specific user.

		Compliance Ins	sights Admin			e
< Infrastructure	Data Engine <b>Test Engine</b> 42366308-1323-71ff-e258-9c642	ad8a2ae				Engines
Overview	Environments	dSources	VDBs	Access		Ore         Create         Ore         Create Environment         Ore         Delete         Ore         Manage Tags           Ore         Read         Ore         Set Tags at Object Creation         Ore         Update
User			Access Groups		Permissions	74
			1 >			View >
John Smith johnsmith@compan	ıy.com		John Smith >			View >

## 6.1.3 Tags

## 6.1.3.1 Tags management

DCT powers data governance with tags. These key-value pairs can be used to associate any business-level data with any Delphix object, to drive greater intelligence in automation, administrative workflows, data access, and reporting. Advanced search for tags is available.

Tags are individual attributes on every object exposed in DCT; from VDBs, to compliance jobs, and even users. There are no limits on tag count per object and character limits are set for flexibility to enable robust grouping.

## 6.1.3.2 Administrative tagging

Tags can be managed from the UI by selecting "View Tags" for a particular object on its global list page. The below example shows the tag configuration screen for a dSource "AGDatabaseSQL2016" and multiple tags have been added to characterize that particular object:

App Team: Alpha 🚷	)	î Remove
Application: Finance	8	Remove
Data Center: West Co	past 😒	Remove
Primary Owner: John	a Smith 😮	Remove
Secondary Owner: Ja	ane Doe 🛞	î Remove
Enter Tag Key	Enter Tag Value	+ Tag

DCT tags enable complex searching to enable intelligent reports. A demonstration using the above example dSource and using expression-based search to filter dSources with the {App Team: Alpha} tag.

d	Sources		ſ	View Tags for "AGDatabaseSQL20	016". ×		
F	Search kags CONTAINS (key EQ Expression Searc	as across your Delphix infrastructure. 'App Team' AND value EQ 'Alpha'} ch ession-based searching. See below for ex	amples of the sea	App Team: Alpha Application: Financo Data Center: West Coast Primary Owner: John Smith Secondary Owner: Jane Doe		Expression Search	*
_	Status	Name 个	Туре	Engine	Edit Tags OK		
	UNKNOWN	AGDatabaseSQL2016	MSSql	amit-engine	View tags (5) >	View >	
	UNKNOWN	AppFS_cust_master	Unstructured File	es Test Engine	View tags (1) >	View >	
	UNKNOWN	AppFS_master	Unstructured File	es Test Engine	View tags (1) >	View >	
						© 2022 Delphix. All Rights Reserved. Priv	vate and Co

## 6.1.3.3 Tags powering attribute-based Access Control

Tags also power the DCT permissions system for both Accounts (users) and Role Scopes (object entitlements). The below example shows an Access Group (Alpha Team) with the Accounts tab on display. Notice that the accounts tab has {App Team: Alpha} under "tag mapping", which automatically attributes any users with the {App Team: Alpha} tag.

$\langle \mathbf{X} \rangle$	DATA CONTROL TOWER	Data	Compliance	Insights	Admin						9
< Access Gro	e35a45ad-4c19	41fb-a6c0-b	8a0df9e68e9 Access								
Tag Map	ping			Edit	Associa	ted Accounts				+ Manually Add Ad	ccounts
App Team	n: Alpha				Search					Search (All)	~
					ID	Username 个	Name	Email	Addition		
					4	John Smith	John Smith	johnsmith@company.com	App Team: Alpha	View >	

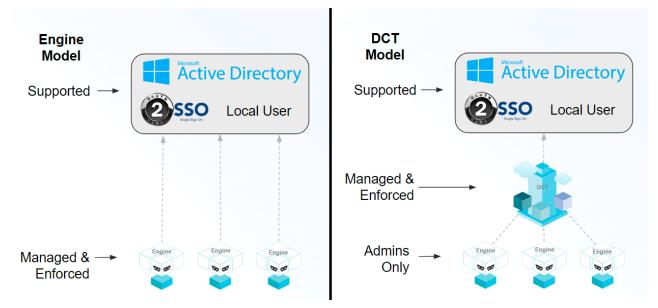
The same goes for Scoped Roles under the "Roles" tab. The Alpha Team role has been mapped to the {App Team: Alpha} tag and all dSources with that same tag are automatically attributed.

CONTROL Data Compli TOWER	iance Insights	Admin		8
Access Group Alpha Team adSa45ad-4c19-41fb-a6c0-b8a0d99e68e9 Accounts Roles A Roles Apha Team >	Edit		Vew Select dSources	

## 6.1.4 Access Control

Data Control Tower (DCT) fundamentally changes how application teams are governed across the Delphix Platform to ease expansion and management burden. Previously, Delphix administrators were focused on managing individual user-level access on each engine. This made it difficult as teams increased their data set requirements. This inevitably led to more time managing engine access and not rolling out test data management (TDM) practices. Now with DCT, all users are managed and access their data sets through a centralized server. This makes it easier for administrators to manage the Delphix Platform and application teams to utilize the self-service capabilities. To take advantage of DCT's new capabilities, Delphix administrators will implement a centralized Attribute Based Access Control (ABAC) model. This is performed by consolidating permission management from the engines to DCT, implementing Access Group policies, and assigning Object tags. The flexibility of this approach ensures your company's required security model can be maintained or even further refined.

The below picture attempts to show the shift in access models. In the original Engine Model, the engines were isolated from one another. No access control mechanisms were shared between Engines. In the DCT Model, Delphix administrators will manage applications teams directly through DCT. Those application teams will log directly into DCT. Only administrators will log into the Engines for advanced usage.



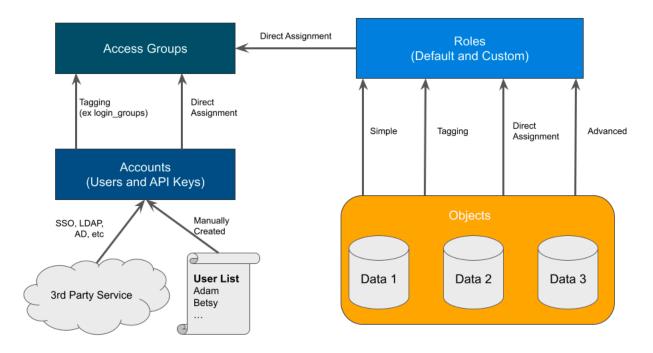
## 6.1.4.1 Access model overview

Data Control Tower implements a model that you might find in other types of software called Attribute Based Access Control (ABAC). This model is incredibly flexible but requires detailed configuration to perfect your use cases. In our model, there are four entity types which are defined below. Understand each entity as they are the foundational blocks of DCT's ABAC model.

Entity	Description	Managed By
Accounts (aka Users)	A single or shared user who can authenticate with DCT (UI or API).	Create manually or via Identity Provider (IdP), such as SSO or LDAP. Accounts are independent of Delphix Engines.
Access Groups	A collection of accounts that share one or more characteristics, such as a Team or Permission set. Equivalent to an Active Directory group.	Manually created. Populated manually or via the 'login_groups' tag.

Entity	Description	Managed By
Roles and Permissions	The collection of read, write, and delete permissions forms a reusable, named role.	Some roles are provided out of the box, but Admins can build their own from the available permissions. Individual permissions are immutable.
Objects	Units, such as VDBs, Bookmarks, and Environments, that are managed across the Delphix Platform.	Automatically identified by DCT from the connected engines. Assigned to Roles via various models. The CD and CC Engines supply these objects.

Each entity is linked to another through manual or automated assignment. A manual (or direct) assignment is a good approach for early implementations. However, it can be challenging to maintain as teams grow. As an alternative, Tagging is suggested as it performs automatic assignments based on your custom configuration. The below diagram shows how each entity is linked together. The directions below start with Accounts creation to Access Groups with Role assignments and finish with Object mappings.

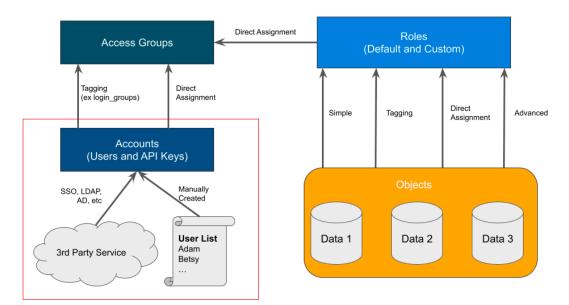


Understanding your team structure is imperative to identify the best access model. Usually, organizations have existing groupings defined in their Identify Provider (IdP). These groups are typically organized in one of two ways (a) a team dedicated towards a central goal (such as a product development team) or (b) a group of individuals with similar permissions (such as Security Administrators). Understanding the purpose of each group should be a guide in how the Roles and Permissions are designed. For example, the Alpha product development team might have full permission to manage existing VDBs and create new bookmarks for their team's "Alpha" objects. On the other hand, Security Admins might have sweeping read and disable access

across the entire platform to ensure compliancy. Iterating through each Access Group and designing custom, but re-useable roles, based on the Principle of Least Privilege<sup>119</sup>, will produce a streamlined rollout.

## 6.1.4.2 Accounts: Manual, LDAP/AD, or SSO/SAML

Goal: Import or create user accounts. Complete either the Manual or LDAP/SOO configuration.



#### Manual (User List)

Navigate to Admin > Accounts, click the "+ Account" button, and complete the form.

$\infty$	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin		secure-key	• 🔒
Accounts		Account	ts					+ Account	
Access Group	s	Manage acco	unts that c	an access Data Co	ntrol Tower.				
Roles		Search					Sea	rch (All) 🗸 🗸	
Authentication	1	ID U	sername	Name 个	Email	Tags			

Manual accounts are great for testing user access or providing a service account. Take note of the checkboxes by which you want this user to access DCT.

<sup>119</sup> https://en.wikipedia.org/wiki/Principle\_of\_least\_privilege

CONTR TOWE	ROL	≡
Accounts	Create Account	+ Account
Access Groups	Create an account and specify the authentication method.	
Roles	Username	Search (All) 🗸 🗸
Authentication	First Name   Last Name	
	Email	View >
	<ul> <li>Add "admin" role to account access group</li> <li>Enable Authentication with username and password</li> </ul>	View >
	Generate API Key Add Account Tags Account tags help you group and organize DCT accounts	
	Enter Tag Key Enter Tag Value + Tag	
	Cancel Create Account	

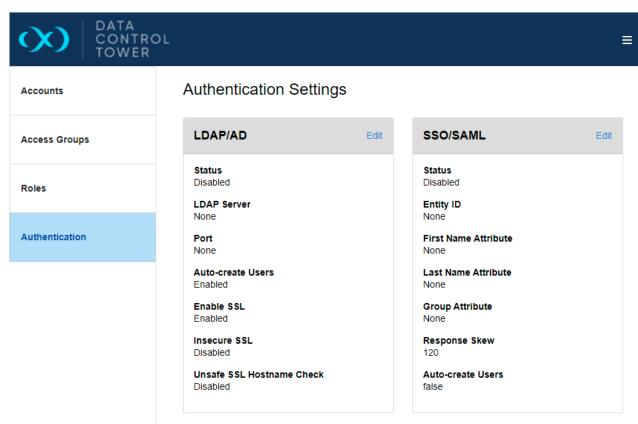
When you have specified all required values, select the "Create Account" button. By default, this user will have no permissions.

#### LDAP/Active Directory or SSO/SAML (3rd Party Service)

Navigate to **Admin > Authentication**, click "Edit" for either LDAP/AD or SSO/SAML, and complete the form. Ensure "Auto-create Users` is enabled. It can be disabled at any time.

If you need guidance on how to configure, follow the directions here:

- LDAP/AD Directions (see page 136)
- SSO/SAML Directions (see page 143)



Once configured, Accounts will be automatically created when a user successfully logs in.

This is functionally different from the old Engine model. Previously, the Account was created manually before they could log in.

#### **Recommended: LDAP/Active Directory Domains**

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It is highly recommended that we also configure group membership during this stage. By defining the metadata attributes in the option Domain fields, DCT can automatically assign users to Access Groups. If configured correctly, you will see an automatically generated login\_groups tag on recently logged-in accounts. If an Account does not have the tag, then (a) the Domain configuration is invalid, or (b) they should re-login. The login\_groups tag is the only tag that cannot be specified on an Account manually.

LDAP/Active Directory Domain Groups Directions (see page 140)

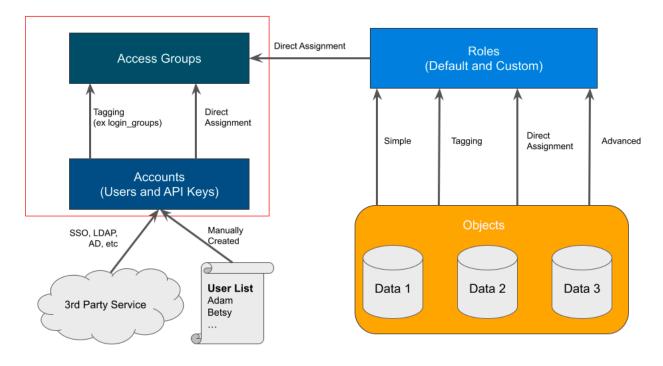
(X) C	ATA ONTROL OWER			≡
	Account Test User Access			
Details	Edit	Access Groups	Tags	Edit
Email Username First Name Last Name	user@test.com test Test User	Team Alpha test	login_groups: A	lpha

#### Example Account with the login\_groups tag.

Please test these new accounts out by logging in on another browser. By default, these accounts will not have any permissions and not see anything. In the following steps, we will give them access. In addition, if configured, we'll take advantage of login\_groups or a custom tag.

## 6.1.4.3 Access Groups: Creation and account assignment

#### 6.1.4.3.1 Goal: Create an Access Group and assign Accounts directly or through Tags.



#### **Access Group Creation**

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Next, navigate to the **Admin > Access** Groups tab, select the "+ Access Group" button, and complete the presented form. As described previously, these groups are based on existing teams or users with similar access. If you successfully configured the Active Directory's Domain Groups, you can specify the login\_groups tag and value here. Or specify a custom Tag, such as "Team: Alpha".

You can also select Roles if you already know which should be applied. Otherwise, ignore it.

Submit the form once you are happy with your new group.

CONTR TOWE	OL		≡
Accounts	Create Access Group X	+ Access Group	
Access Groups	Access Group Name Team Alpha		
Roles	Select Role(s) Select the roles for the access group which determine the permissions and objects the group can access.	Search (All) 🗸 🗸	
Authentication	Select Roles 🔹		
	Select Account Tags Select account tags that will automatically add corresponding accounts to this Access Group.		
	login_groups: Alpha 😵		
	Enter Tag Key Enter Tag Value + Tag		
	Cancel Create Access Group		

Unlike an Account, you can specify the `login\_groups` tag on an Access Group shown in the picture above.

On completion, you will be presented with a page similar to the one below. Unfortunately, it's empty. Let's add some associated Accounts now.

	TA NTROL VER						≡
< Access Groups	Access Group Team Alpha 0144e806-1146-4a11-a929-	f520fa503052					
Accounts	Roles	Access					
Tag Mapping	Edit	Associate	d Accounts			+ Manually Add Ad	ccounts
		Search				Search (All)	~
		ID	Username 个	Name	Email	Addition	
				No items			

#### Manual (Direct) Assignment

Select the "+ Manually Add Accounts" button, select the desired Account, and then "Add Account". Immediately, you'll see it presented in the Associated Accounts list.

DATA CONTROL TOWER	Home Data Compliance Insights Admin	secure-key 😫
Access Gi	Add Account to Access Group	
Access Groups     Tean     0144e806     Accounts	Account Selection user 39: test (Test User)	
Tags	43: user1 (User One) 44: user2 (User Two)	+ Manually Add Accounts
login_groups: Alpha	46: user3 (User Three)	Search (All)
Team: Alpha	ID Username 🛧 Name Email Addition	

This is a good solution for quick management. However, it can be cumbersome as usage grows. Therefore, we recommend tags!

#### **Tag Assignment**

First, navigate to the **Admin** > **Accounts** tab and select an existing Account. (Feel free to create another one!) Once selected, add a custom Tag such as 'Team: Alpha". If one already exists on the Account, such as "login\_groups", remember it.

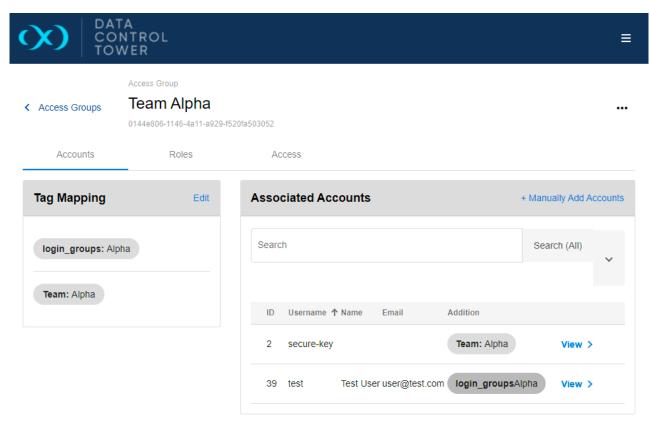
CONTR TOWE	OL	≡
Accounts	Add Tags for "test".	+ Account
Access Groups	login_groups: Alpha 😒	
Roles	Team Enter Tag Value + Tag	Search (All) 🗸
Authentication		
		View >
		) View >
	Cancel Save	View >
	44 userz Oser two userz@userz.com Add tags >	View >
	46 test Test User user@test.com Add Tags >	View >

Next, navigate back to the Access Group, select the Tag Mapping's "Edit" button, and specify that same Key: Value pair. It might look similar to the below picture.

CONTR TOWE	OL		≡
Ac Access Groups	Add Tags for "AccessGroup-0144e8 4a11-a929-f520fa503052".	06-1146-	
01 Accounts	login_groups: Alpha 😵	Remove	
Tag Mapping	Team: Alpha 👔	Remove	+ Manually Add Accounts
	Enter Tag Key Enter Tag Value	+ Tag	Search (All)
			Addition
	Са	ncel Add Tags	

In this example, the "Team: Alpha" and "login\_groups: Alpha" were added through the Access Group's Tag Mapping widget. If configured successfully, your Access Group might look similar to the below picture. If you remove the Access Group or Account's tag, you will see Account automatically removed from this listing.

The "login\_groups" tag functions identically to a custom tag within the Access Group. Again, the only difference is that it's automatically assigned to the Account.



This section taught us how to organize Accounts into different groups. This allows us to keep permission sets separated. Feel free to experiment with new Access Groups, Tags, and Accounts. If you still need additional pointers, review our Access Groups Documentation (see page 178).

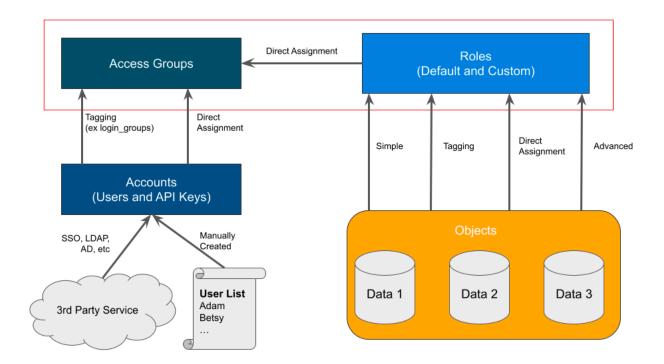
# 6.1.4.4 Roles: Creation and assignment

## 6.1.4.4.1 Latest changes

- Version 2025.1.0
  - UI profiles have been added to Roles. At this time, UI profiles are 1:1 with roles and can be assigned at creation or with an update to a role. The built-in roles are given their own profiles at the start.
  - The navigation links for most list pages will be shown or hidden according to the UI profiles a user has. As an example, a user with the "devops" role and UI profile will be able to see the Data top menu and all submenus, a few of the data-related reports, and the Operations page, but would not be able to see any Compliance pages without additional UI profiles.

## 6.1.4.4.2 Getting started

The illustration below shows that user accounts get grouped into Access Groups, which are then assigned various Roles that ultimately control which data objects each group can see or work with—a high-level snapshot of how user provisioning and permissions flow.



# 6.1.4.4.3 Viewing roles

Navigate to the **Admin** > **Roles** tab to see a list of DCT's default roles. Each role has its selection of permissions, such as Read VDB, Delete Bookmarks, Modify dSources, etc. Select **View** on any role to see its permissions.

CONTRO TOWER	L Home Da	ata Compliance Insights <u>Admin</u>		secure-key 🧲
Accounts	Roles		missions.       search (AI)          cription       included Object Types          cription       included Object Types          nts unrestricted access to all operations.       AI Objects       View >         nts unrestricted access to all operations.       CDBs, VCDBs, VIRTUALIZATION_POLICY, VDB Goups, Environments, Dataset Groups, Engines, Product Info, Database Templates, dSources, VDBs, View >          nts permission to provision, manage and delete VDBs and Codes, Legines, Masking Jobs, Product Info, Jobs, MASKING_ENVIRONMENT, Connectors       View >         nts permission to manage masking objects.       Masking Jobs Sets, Engines, Masking Jobs, Product Info, Jobs, MASKING_ENVIRONMENT, Connectors       View >         nts permission to manage masking objects.       Objects, VUB Inventory Report, VCDBs, VIRTUALIZATION, POLICY, VDB Goups, difformed to the port Engines, dBource Consumption, Masking Jobs Sets, Engines, Masking Jobs, Product Info, Jobs, MASKING_ENVIRONMENT, Connectors       View >	+ Role
Access Groups	Roles contain a lis	st of permissions.		
Roles	Search			Search (All)
Authentication	Name 🛧	Description	Included Object Types	
	admin	Grants unrestricted access to all operations.	All Objects	View >
	admin         Grants unrestricted access to all operations.         All Objects           devops         Grants permission to provision, manage and delete VDBs and their infrastructure.         CDBs, VICTUALIZATION_POLICY, VDB Groups, Environments, Dataset Groups, Engines, Product Info, Database Templates, dSources, Sources, Bookmarks, Jobs           masking         Grants permission to manage masking objects.         Masking Job Sets, Engines, Masking Jobs, Product Info, Jobs, MASKING_ENVIRONMENT, Connectors		, View >	
		View >		
	monitoring	Grants read access to engines, environments, sources, dsources, vdbs, and cdbs as well as access to all reporting APIs.	CDBs, VDB Inventory Report, VCDBs, VIRTUALIZATION, POLICY, Environments, VDB Groups, dSource Usage Report, Engines, dSource Consumption Report, Product Into, API Usage Report, Storage Summary Report, dSources, VDBs, Sources, SMITP Config, Bookmans, Joos, Report Schedules	n View >
	owner	Grants access to all operations on selected target objects.	CDBs, VCDBs, VDB Groups, Environments, Vaults, Engines, Database Templates, Accounts, dSources, Masking Job Sets, VDBs, Access Groups, Sources, Masking Jobs, Bookmarks, Report Schedules, Connectors	View >

On the left-hand side is a description, the Access Groups the role is currently a part of, and any assigned tags. On the right-hand side is the complete list of permissions. For example, view the "devops" role to see Manage Tags and Read permissions on the CDBs objects. These various permissions make up the role's identity.

DCT's default roles are immutable.

## 6.1.4.4.4 Creating a role

To create a role, navigate back to the Admin > Roles tab and select the **+Role** button. Give the role a custom name, sample description, and add all the permissions desired. In the example below, the VDBs section is expanded with the arrow and the Read, Refresh, and Manage Tags permissions are selected. If you want to select the entire section, use the checkbox for the section instead of expanding it with the arrow.

Confirm your selection and click Create. You can modify your permissions further on the next page.

CONTR TOWE	CL	≡
Accounts	Create Role	+ Role
Access Groups	Limited Monitoring	ĺ.
Roles	Simple Blog Post Role	All) 🗸
Authentication	✓ ☐ Access Groups	
		iew >
	∧	
	✓ Read	iew >
	Provision	
	Stop v	iew >
	Start	
	Disable	iew >
		iew >
	✓ Refresh	
	Manage Tags	iew >
	· · · · · · · · · · · · · · · · · · ·	
	Cancel Create	

## 6.1.4.4.5 Role assignment

Roles, by themselves, provide no access. You must first assign them to an Access Group and a set of objects before their permissions are applied to an account.

Navigate back to the **Admin > Access Groups** tab and view your previously created Access Group. Select the Roles subtab and then click to Edit.

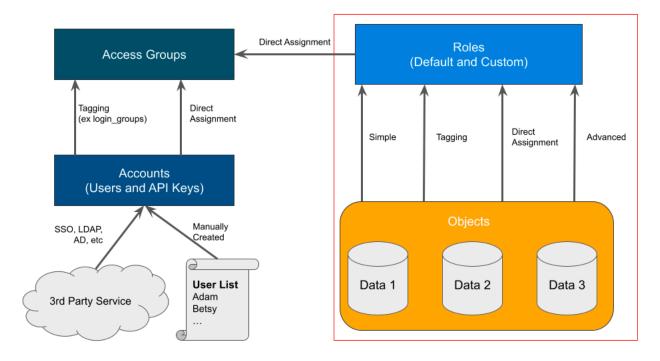
< Access Groups	Access Group Team Alpha 0144e806-1146-4a11-a929-f52	0fa503052	
Accounts	Roles	Access	
Roles			Edit

Now you can assign default Roles, such as "devops", or a newly created one. Role assignment is also possible during Access Group creation. On Save, your Access Group might look like the following.

	TA NTROL WER			≡
Access Groups	Access Group Team Alpha 0144e806-1146-4a11-a929-	1520fa503052		
Accounts	Roles	Access		
Roles	Edit	devops Role Scope	SIMPLE	Actions :
Limited Monitoring	g >	Limited Monitoring Role Scope Limited Monitoring	SCOPED	Actions :

Immediately on assignment, all users within the Access Group will now have the permissions assigned to them through these roles. If you are logged in as an admin, you must log in as a test account user to see the effects. Admin users have full access to every object on DCT.

# 6.1.4.5 Objects: Refine permission to targeted objects

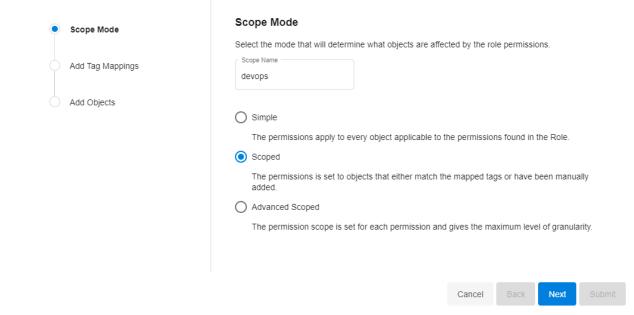


Every Access Group's Role has its own set of Objects to which the permissions are applied. In the previous section, we defined the permissions, and now we select the Objects. Objects are assigned in three different modes. They are listed below with their method of application:

- 1. Simple All Objects within DCT.
- 2. Scoped
  - a. Tags Objects with matching Tags.
  - b. Direct Objects manually assigned.
- 3. Advanced Scoped Objects are assigned directly on the permission action (such as Read Bookmark, Edit Bookmark, or Delete Bookmark) using Tags or Direct Assignment.

#### Edit devops Role Scope

Х



We will work through the first two in this post, Simple and Scoped. Advanced is easier to comprehend afterward and a solid self-lead challenge. Before diving into this section, we recommend that your DCT server has a handful of objects, such as Bookmarks or VDBs.

#### Simple

If you have been following the post steadily, you should have two Roles assigned to your Access Group. In my example I have "devops" and "Limited Monitoring". Both are given the "Simple" mode by default. We can see the breadth at which this Role governs by selecting anywhere on its row and then the "Preview" button on the right-hand side.

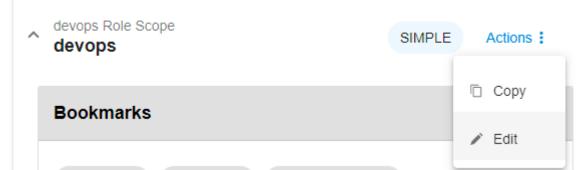
	TA NTROL WER			≡	\	/iew Select Bookmar	ks
Access Groups	Access Group Team Alpha 0144e806-1146-4a11-a929-	4520fa503052			[	Search	
Accounts	Roles	Access			/	Name 1	Addition Method
Roles	Edit	devops Role Scope devops	SIMPLE	Actions :		CRIT-BUG-2	All Bookmarks
Limited Monitoria	ng >	Bookmarks		Preview		CRIT-BUG-4	All Bookmarks
						CRIT-BUG-5	All Bookmarks

In this example, we select the "Preview" list for Bookmarks. It displays every Bookmark this role has access to and the method to which they are applied. If we wanted to validate, we could log in as a user on this Access Group and verify the permissions are applied. However, this is an easier way for Administrators to confirm without switching logins. Because this is a "Simple" scope, every object is available, so this view is not particularly intriguing. In the next part, we'll refine our Role.

If you do not see any objects listed in the "Preview" widget, that object might not be available to DCT. This could be because (a) engines are not connected, (b) the DCT-only object (such as Bookmarks or VDB Groups) is not created, or (c) permissions are being enforced correctly.

#### **Scoped - Direct**

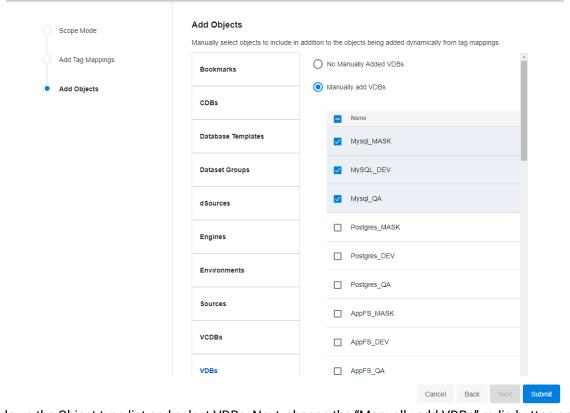
Let's change the mode to "Scoped" and target a subset of VDBs. On the Access Group > Roles tab, select the **Action** > **Edit** button of your chosen Role.



A new wizard will appear with the Simple, Scoped, and Advanced Scoped options. Change the Role's mode from "Simple" to "Scoped". Skip the "Add Tag Mappings" for now and select "Next" to move to "Add Objects". You will be presented with a long list of the objects available to DCT. This is where you can manually assign specific DCT objects.

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#### Edit devops Role Scope



Scroll down the Object type list and select VDBs. Next, choose the "Manually add VDBs" radio button and, on the right-hand list, select a couple of VDBs. Feel free to add other available Objects too. When happy with your selection, press the "Submit" button. This set of actions should change the Role's "Simple" mode to "Scoped" mode. Let's verify by, again, opening the Role's row, scrolling to your chosen Object Type, and selecting the VDBs' "Preview" button.

(X)   C	ATA ONTROL OWER	Home Data Co	mpliance Insights	Admin		secure-k	ey 😝
	Access Grou	View Select VD	Bs				
< Access Groups	Team , 0144e806-11	Search					
Accounts	F						
		Name 个	Addition Method				-
		MySQL_DEV	Manual		View >		
		Mysql_MASK	Manual		View >		
		Mysql_QA	Manual		View >	Preview	
			Iten	ns per page: 50 🔻 1 – 3 of 3	< >		
					Close	Preview	
				Or Manage Tags Or F	Read		
				VDBs		Preview	
				Or Create Or Create	Bookmark Or C	create VDB Group	

In my example, the same three VDBs I selected during permission configuration are shown here. If you want to verify manually, log in as your other test user and confirm.

Any other Roles or Access Groups assigned to this user might affect its visibility. So if you do this test, ensure it's not accidentally pulling in another permission set.

#### Scoped - Tags

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Direct Assignment is a solid strategy for early onboarding and one-off requirements. However, as we expand our consumption of Delphix, I suggest leveraging the Tagging mechanism to assign permissions quickly. Similar to the Account & Access Group's "login\_groups" tag, we can assign tags to Objects and Roles to immediately grant or restrict access. This is the recommended approach for a robust production implementation.

Before jumping back into a Role, navigate to the top-level Data >VDBs tab. (If you don't have any VDBs, select another tab with available objects.) Here identify a test object and select the "Add Tags" button.

CONTROL TOWER	Home <u>Data</u> Compliance Insights Admin	secure-key 😝
dSources	Add Tags for "AppFS_cust_QA".	Provision VDB
VDBs	Team: Alpha 😒	
Bookmarks	Environment Environment Environment Environment	Search (All) 🗸
Infrastructure		
VDB Config Templates		View >
		View >
	Cancel Save	View >
	RUNNING Appro_cusi_Dev Unstructured Files CDET Add rags >	View >
	RUNNING AppFS_cust_MASK Unstructured Files CDE1 Add Tags >	View >
	RUNNING AppFS_cust_QA Unstructured Files CDE1 Add Tags >	View >

In this form, we assign a simple Key-Value pair. This pair helps govern access and maintain the organization of the Delphix Platform. I've selected the "Team: Alpha" and "Environment-Dev" pairs in my example. Repeat the process for a couple of other objects using similar or different Key-Value pairs. As I explained earlier in this post, we can define and create an organizational structure in many ways. If you prefer other pairings, please experiment, such as with Geography, Age, DB Type, or Importance.

Next, let's take advantage of the created tags in the Access Model. Navigate back to your test Access Group, select the Roles tab, and edit the Role we modified previously. Because "Scoped" is already chosen, press the "Next" button, but this time stop on the "Add Tag Mappings" view. Similar to your Object's tag assignment, specify one or two of the same Key-Value pairs here.

# Edit devops Role Scope

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Scope Mode     Add Tag Mappings		, - amically add objects that are a gs for each permission include	ped tag. Ir	n Advanced	
Add lag mappings	Team: Alpha 😢			🔋 Remove	3
	Enter Tag Key	Enter Tag Value		+ T	ag

In my example, this process will assign the Objects with the chosen "Team: Alpha" tag to this "devops" Role. Thus, granting the set of permissions defined by "devops". Finally, we can verify again by completing the form and previewing the Role.

Compliance li	nsights <u>Admin</u>		
	View Select VDBs		
	Search		-
ess			
	Name 个	Addition Method	
	AppFS_cust_DEV	Team: Alpha	View >
	AppFS_cust_MASK	Team: Alpha	View >
	AppFS_cust_QA	Team: Alpha	View >
	MySQL_DEV	Manual	View >
	Mysql_MASK	Manual	View >
	Mysql_QA	Manual	View >
	OracleDEV_CHT	Team: Alpha	View > -
		Items per page: 50 💌	1 – 9 of 9 < 📏
			Close
		Orr Set Tags at Object	Creation Or Snapshot Or Snapshot

In my example, we can see a mix of objects assigned to this role through Tags and Manual (direct) assignments.

At this point, challenge yourself by adding and removing tags to different Roles and Objects to understand the flexibility of the ABAC model. If you need a deeper dive into Tags, read our documentation here. (see page 170)

# 6.1.5 VDB templates

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For additional detail on VDB templates, visit the "Configuration Settings for Oracle VDBs" article in the Continuous Data Engine documentation.

DCT has implemented a global VDB template system to centrally manage and apply VDB templates for any and all VDB provisioning workloads. This feature works as an extension of the local VDB template system on Continuous Data Engines as a means of enforcing VDB configuration standards and policies uniformly.

DCT Admins have the choice of either importing pre-existing VDB templates from a local engine or creating net-new templates from within DCT.

# 6.1.5.1 Creating templates

Users can create Database Templates directly via DCT, which can then be used on VDBs across their engines. The DCT API interface for creating templates is equivalent to that of on-engines, requiring a name and sourceType, and optionally taking in a description and the list of config parameters. Here's a sample CURL command:

```
curl -X 'POST' \
 '<https://<APPLIANCE_ADDRESS>/v2/database-templates'> \
 -H 'accept: application/json' \
 -H 'Authorization: <API_KEY>' \
 -H 'Content-Type: application/json' \
 -d '{
    "name": "vdb-config-template-1",
    "source_type": "OracleVirtualSource"
    "parameters": {"config1": "value1", "config2": "value2"}'}
```

This will result in a new DCT **DatabaseTemplate** object, which can then be viewed using the **List/Get/Search** APIs.

# 6.1.5.2 Importing templates

Unlike many other Delphix objects, DCT is not automatically pulling in all the Database Templates from registered engines and creating DCT objects out of them. It is often the case that users have already made arrangements and have copies of their templates across their engines. DCT does not blindly import the templates to avoid generating duplicates, leading users to consolidating and clean up. Instead, DCT provides an import API that can be used to selectively choose which engines they wish to import their templates from, along with an API to undo imports. The import workflow has a couple of things to be aware of:

- The user cannot be selective of which individual templates to import from an engine. The import API will pull ALL templates from that engine.
- Import is allowed only one time per Engine. After an initial import, subsequent imports will be blocked, and it is assumed that a user will use the DCT APIs to create more templates.
- In the event that an import was done on accident or no longer desired, the undo import API can be called to delete all the imported templates from the selected engine. This will result in the removal of all DCT Database Templates that were created as a result of the import.
- If an imported template is later used on a VDB running on a different engine than where it was originally imported from, then the undo import flow is also prohibited, as DCT can no longer safely delete a template that is in use elsewhere.

Import templates from the engine:

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v2/database-templates/import' \
    -H 'accept: */*' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "engine_id": "3"
}'
```

Undo the imported templates from engine:

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v2/database-templates/undo-import' \
    -H 'accept: */*' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "engine_id": "3"
}'
```

## 6.1.5.3 Using templates

DCT Database Templates can be used by specifying the template\_id property at VDB provisioning time, or by updating the template\_id on an existing VDB. In either case, DCT will deploy the template to the respective engine and bind the template with the VDB. When a DCT Database Template currently in use is updated or deleted, those changes are propagated to the respective VDBs and engines.

If a VDB has the same parameter called out in both VDB template and individual setting, the value specified in the template will take precedence. The individual parameter value will only be used if the VDB template is removed.

Updating a VDB to use template\_id:

```
curl -X 'PATCH' \
    'https://<APPLIANCE_ADDRESS>/v2/vdbs/1-ORACLE_DB_CONTAINER-1' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "template_id": "319db966-961c-4977-a444-14d337aa3276"
}'
```

Updates to a VDB template will propagate to all associated VDBs.

# 6.1.6 Client telemetry

DCT provides complete flexibility to clients on how to attribute their API calls. DCT captures the value provided in an optional HTTP header (X-Dct-Client-Name) and standard, mandatory HTTP header (User-Agent) for the purpose of attributing an API call. These values are stored as client\_name and user\_agent in the backend, and can be queried in the report. Below are some examples of how this can be used.

#### Example one

Clients can view the report grouped on the basis of client name and API classification by providing a group\_by query parameter.

```
curl --location 'https://[Inser_DCT_Server]/v3/reporting/api-usage-report?
group_by=client_name%2Ckind' \
--header 'Authorization: <api_key>' \
--header 'Accept: text/csv'
api_endpoint,api_method,api_count,kind,client_name,user_agent,dct_version
,,2,management,client-1,,
,,5,management,client-2,,
,,20,management,client-3,,
```

The group\_by parameter supports any combination of properties from api\_endpoint, api\_method, kind, client\_name, user\_agent, and dct\_version. All properties function as their name describes, where kind corresponds to API classification.

#### Example two

Clients filter the records for a list of particular client names, DCT versions, user agents, or classifications, by providing corresponding query parameters.

1. Filter the API calls by client names.

```
curl --location 'https://[Inser_DCT_Server]/v3/reporting/api-usage-report?
group_by=client_name%2Ckind&client_name=client1%2Cclient2' \
--header 'Authorization: <api_key>' \
--header 'Authorization: apk <api key>
```

2. Filter the API calls by API classification.

```
curl --location 'https://[Inser_DCT_Server]/v3/reporting/api-usage-report?
group_by=client_name%2Ckind&api_metric_kind=automation' \
--header 'Authorization: <api_key>' \
--header 'Authorization: apk <api key>'
```

The API query parameters for this report are dynamic; depending on the number of records in the backend and the granularity of the response requested, API response can be too large to be handled by DCT. DCT can run out of memory and eventually crash if that is the case. To prevent this from happening, this report has the maximum limit set to 10,000 records in the API response. Thus, it is strongly recommended to always 'limit' the scope of the usage response by filtering records on the basis of start\_date and end\_date query parameters, or on the basis of client names and/or user agents.

# 6.2 Central management workflows

Data Control Tower delivers the management layer for all connected Delphix engines by virtue of its converged architecture. As such, DCT has the ability to simplify everyday administration of common engine admin tasks. This section will go over various how DCT exposes object relationships and reports on meaningful use patterns under insights.

- Managing environments (Continuous Data) (see page 198)
- Managing dSources (see page 200)
- Managing VDBs (see page 204)
- Managing replications (see page 208)
- Managing policies (see page 230)
- Managing bookmarks (see page 233)

# 6.2.1 Managing environments (Continuous Data)

# 6.2.1.1 Global environments list

DCT provides the ability to view, search, sort, and filter all Continuous Data environments within a connected Delphix ecosystem. This page can be found under the **Data** section and is used to find and act upon all environment connections.

CONTRC TOWER	DL <u>Data</u> Compliance Insights Admin							
dSources	Environments							
VDBs	An overview of environments across your Delphix infrastructure.	n overview of environments across your Delphitx infrastructure.						
Bookmarks	Search						Search (All)	~
Environments	Name 个	Hosts IP (Port)	DBMS (Version)	Config	Engine ID	Tags		
nfrastructure	bhavik-src	bhavik-src.dlpxdc.co bhavik-src.dlpxdc.co	Unstructured Files Oracle (19.3.0.0.0)	Standalone	2	Add Tags >	View >	
/DB Config Templates	bhavik-tgt	bhavik-tgt.dlpxdc.co bhavik-tgt.dlpxdc.co	Unstructured Files Oracle (19.3.0.0.0)	Standalone	2	Add Tags >	View >	
	rhel-790agg-qar-74961-27a4593a.dcol1.delphix.com	rhel-79Dagg-qar-74961-27a4593a.dcol1.delphix.com rhel-79Dagg-qar-74961-27a4593a.dcol1.delphix.com	Oracle (12.1.0.2.0) Unstructured Files	Standalone	1	Add Tags >	View >	
	rhel-79e3ub-qar-74961-27a4593a.dcol1.delphix.com	rhel-79e3ub-qar-74961-27a4593a.dcol1.delphix.com rhel-79e3ub-qar-74961-27a4593a.dcol1.delphix.com	Unstructured Files Oracle (12.1.0.2.0)	Standalone	1	Add Tags >	View >	
					Items p	er page: 50 👻 1	- 4 of 4 🛛 🔍	>

# 6.2.1.2 Manage environments

Selecting a standalone environment in the **Data** page shows an ellipsis in the top right corner. When the button is selected, the option to Enable/Disable, Refresh, or Delete the environment appears.

CONTROL Data Compliance Insights Admin	e
Environment Environment bhavik-src US-2-UNCL-HOST_ENVIRONMENT-1	
Environment Users	Listeners Delete
Username	
* oracle Actions -	
Host Details Edit Host	Tags Edit

# 6.2.1.3 Edit host details

Selecting a standalone environment in the **Data** page shows an **Edit Host** option; it is not yet available for cluster environments. When the button is selected, the host details window will open, showing the input fields that can be edited. Select 'Save' to confirm the changes and close the window.

DATA CONTROL Data TOWER	Compliance Insights	Admin	9
C Environment Win ID: 3-WINDOWS			
Overview Access		Edit Host	
Environment Users		Host Address	
* \delphix		OS Windows Wersion Windows Server 2019 Standard Java Development Kit None	
Host Details		Edit Host Timezone America/Los, Angeles, PST-0800	Edit
Host Address .delphix.com		Total RAM 4.0058 Processor Type AMD64	
Windows		DSP KeyStore Alias	
Version Windows Server 2019 Standard		DSP KøyStore Path	
Java Development Kit None		DSP TrustStore Path	
Timezone America/Los_Angeles,PST-0800		Cancel Save	
Total RAM 4 00GB			

# 6.2.2 Managing dSources

# 6.2.2.1 Managing dSources

DCT provides the ability to view, search, sort, and filter all dSources within a connected Delphix ecosystem. This page can be found under the **Data** section and is used to find and act upon all dSources, if they have the appropriate access.

CONTRC TOWER	L <u>Data</u> Complia	ance Insights Admin				
dSources	dSources					
VDBs	An overview of data sou	irces across your Delphix Infrastructure.				
Bookmarks	Search					Search (All) v
Environments	Status	Name 个	Тура	Engine	Tags	
Infrastructure	UNKNOWN	AppFS_cust_master	Unstructure	d Files Test Engine	Add Tags >	View >
	UNKNOWN	AppFS_master	Unstructure	d Files Test Engine	Add Tags >	View >
VDB Config Templates	UNKNOWN	CDOMLOSR421FPDB1	Oracle	bhavik-engine	Add Tags >	View >
	UNKNOWN	CDOMLOTG5813PDB1	Oracle	bhavik-engine	Add Tags >	View >
	RUNNING	CDOMSHSRASEEPDB2-rhei-79-e3ub-qar-74961-27a4593a.dcol1.delphix.com	Oracle	amaresh-engine1	Add Tags >	View >
	UNKNOWN	DBOMSR8A1718	Oracle	bhavik-engine	Add Tags >	View >
	UNKNOWN	Mysql_master	mysql-plugii	n Test Engine	Add Tags >	View >
	UNKNOWN	Oracle_master	Oracle	Test Engine	Add Tags >	View >
	UNKNOWN	Postgres_cust_master	postgres-vs	dk Test Engine	Add Tags >	View >
	UNKNOWN	Postgres_master	postgres-vs	dk Test Engine	Add Tags >	View >
	UNKNOWN	Suitecrm_master	MSSql	Test Engine	Add Tags >	View >
	UNKNOWN	flaskapp	MSSql	Test Engine	Add Tags >	View >

# 6.2.2.2 dSource details page tabs

## 6.2.2.2.1 Overview

In the list of dSources, select the **View** button on the right side of one, which will redirect to the dSource's details page. This will bring the user to a new screen, where several tabs are located at the top of the page, including the name of the dSource that was selected. The name of the dSource, breadcrumbs back to all dSources, the UUID of the dSource, and the Actions menu are static throughout each tab. The action menu contains different operations available for the dSource, depending on the type of data it sources from.

CONTROL Home Data Compliance Insights A TOWER	dmin		🔅 Bootstrap Admin 😫
dSources > Ferrari C Back Ferrari UUID: 7d536cc21dda90194d7999becfd108cf Overview Timeline Bookmarks Policies Data Manag	ement Hooks Access	x	Actions - Create Snapshot X Disable
Platform MSSqI		status RUNNING	<ul> <li>Enable</li> <li>Detach</li> <li>Attach</li> <li>Delete</li> </ul>
Details Type dSource Platform MSSql Version 13.2.5233.0 Enabled True Detached	Tags No tags added	✓ Edit Environment Details Environment Name Window src Type Single Instance OS Windows	

## 6.2.2.2.2 Timeline

Users are able to view snapshot information by tabbing over to the Timeline section, which lists all available snapshots via a vertical timeline. Users are able to modify snapshot retention periods by clicking on the ellipsis located to the right of the relevant snapshot.

## 6.2.2.2.3 Hooks

The Hooks section is for managing user-defined scripts that run at specific points (available for MSSQL dSources). With the 2025.1.0 release, users can create, edit, delete, and reorder these hooks directly from this section, allowing for greater flexibility and customization of automation workflows in DCT.

• **Create**: Allows the user to create a new hook. Clicking the Add hook button opens a window where name, type, and script can be configured. Once details are entered, click the button again to initiate an *update hook* operation.

- Edit: Allows the user to edit an existing hook. Clicking the Edit button will show the same window that appears when a hook is created, allowing the name, type, and script to be modified. Once details are edited, click the button again to initiate an *update hook* operation.
- **Delete**: Allows the user to delete an existing hook. When the Remove button is selected on any hook, a confirmation window will appear. Once confirmed, a job is initiated to delete the hook.
- **Reorder**: Allows the user to re-order hooks. The Reorder button is enabled when there is more than one (1) hook. Reorder the hooks by dragging the hook cards in the right sequence. Confirm or cancel the selection.

CONTROL Home Data Complian	nce Insights Admin	تَ∯ jk-admin
dSources > McLaren KCLaren UUID: c7/28068946564659c600052095f332		Actions -
Overview Timeline Bookmarks Polic	es Data Management Hooks Access	
Hook Points Select hook point to add hooks on the right.	Hooks Hooks run in order from top to bottom, drag hook cards to re-order.	Gill Reorder + Add Hook
Pre Sync >	Pre-H2	🔋 Remove 🧪 Edit
Past Sync	Type: Run PowerShell Command (with default version) Script echo 'Pre-H2'	

# 6.2.2.2.4 Access

Users are able to audit what other users have access to with a particular dSource, what access group they belong to, and the associated permissions that each user has on that dSource.

# 6.2.2.3 dSource operations

New dSource operations have been added for MSSQL, ASE, and AppData sources.

## 6.2.2.3.1 MSSQL operations

• Hooks

The Hooks section is for managing user-defined scripts that run at specific points. With the 2025.1.0 release, users can create, edit, delete, and reorder these hooks directly from this section, allowing for greater flexibility and customization of automation workflows in DCT.

## Attaching (linking) and Detaching (unlinking) dSource

From a dSource detail page, the Actions menu now contains an Attach/Detach action for MSSQL databases. This was previously available via backend APIs, before the UI implementation. Attaching a dSource requires you to configure the source environment and source installation, the database, and the staging environment and staging installation related to where the dSource will attach.

Once these selections are made, authenticate the database using one of the following options:

a. Database username/password: Provide a valid username and password.

- b. Environment users: Select valid users from the dropdown.
- c. Domain user with password credential: Provide a valid domain username and password.
- d. **Domain user with vault credential**: Set up vaults on the engine to enable authentication with this option.

# 6.2.2.3.2 MSSQL, ASE, and AppData operations

## Manual snapshot

From a dSource detail page, the Actions menu now contains a Create Snapshot action. This feature allows users to take manual snapshots of a dSource, which was previously only available to certain dSources types.

# Delete and Force delete

From a dSource detail page, the Actions menu now contains a Delete action. Engaging this action prompts the user to confirm deletion. In addition, a checkbox is available to Force delete the dSource, if needed. This action is not available for dSource replicas and will appear disabled for dSources with dependent VDBs.

# 6.2.2.4 dSource linking

DCT 10.0.0 introduces the feature to link a dSource using DCT APIs. With the new API parameters exposed from DCT, you can get the dSource linking defaults and use them to connect the dSource. The API parameters are available in the API references<sup>120</sup> article under:

- BaseDSourceLinkSourceParameters
- OracleDSourceLinkSourceParameters
- OracleStagingPushDSourceLinkSourceParameters
- AppDataDSourceLinkSourceParameters
- ASEDSourceLinkSourceParameters
- LinkDSourceResponse
- LinkDSourceDefaultRequest
- MSSQLDSourceLinkSourceParameters
- MSSQLDSourceStagingPushLinkSourceParameters

DCT supports APIs for linking all types of databases. DCT does not have a GUI flow for these APIs yet, which is why they are API only.

As a prerequisite, Continuous Data Engines should be registered in DCT and should have non-linked sources to be linked as a dSource.

<sup>120</sup> https://dct.delphix.com/docs/latest/api-references

# 6.2.3 Managing VDBs

DCT provides the ability to view, search, sort, and filter all VDBs within a connected Delphix ecosystem. This page can be found under the **Data** section and is used to find and act upon all VDB if they have the appropriate access.

CONTRO TOWER	L <u>Data</u> Complianc	e Insights Admin				(
dSources	VDBs					
VDBs	An overview of VDBs across	your Delphix infrastructure.				
Bookmarks	Search					Search (All) 🗸 🗸
Environments	Status	Name 个	Туре	Engine	Tags	
Infrastructure	RUNNING	AppFS_DEV	Unstructured Files	Test Engine	Add Tags >	View >
	UNKNOWN	AppFS_MASK	Unstructured Files	Test Engine	Add Tags >	View >
VDB Config Templates	UNKNOWN	AppFS_QA	Unstructured Files	Test Engine	Add Tags >	View >
	UNKNOWN	AppFS_cust_DEV	Unstructured Files	Test Engine	Add Tags >	View >
	UNKNOWN	AppFS_cust_MASK	Unstructured Files	Test Engine	Add Tags >	View >
	UNKNOWN	AppFS_cust_QA	Unstructured Files	Test Engine	Add Tags >	View >
	UNKNOWN	CDOMLOSR421FPDB1_93T	Oracle	bhavik-engine	Add Tags >	View >
	RUNNING	CDOMSHSR-GCGXEX-1679919625365	Oracle	amaresh-engine1	Add Tags >	View >

# 6.2.3.1 VDB overview

Individual VDB details can be seen and acted upon by clicking down on a particular VDB detailed view. Once clicked, users will be sent to an "overview" tab that provides relevant metadata related to the VDB.

CONTROL TOWER	Data Compliance Insights Admin					9
VDB VDBs AppFS_DEV DD 3-APPDATA_CONTAINE Overview Active T		Access				
Platorm Unstructured Files					NG	
Details		Tags	Edit	Environment Details		
Type Platform Version Size Engine	VDB Unstructured Files 30.23MB Test Engine			Environment Name Type OS	Postgres_Target Single Instance Linux	

# 6.2.3.2 VDB active timeline

Actionable snapshots are listed on the Active Timeflow tab. From this page, users can refresh, enable, disable, start, stop, delete, and create bookmarks on the VDB.

These actions are available for vCDBs as well. When performing disable or delete actions on a vCDB, it is important to stop all vPDBs first.

DATA CONTROL <u>Data</u> Compliance Insights Admin TOWER	e
< VDBs AppFS_DEV	-
ID: 3-APPDATA_CONTAINER-278 Overview Active Timeflow Timeflow History Bookmarks Access	Refresh
	Enable
<b>Today</b> Mar 27, 2023	Disable
Snapshot     11-22 AM	Start
	Delete
	Delete

# 6.2.3.3 VDB timeline history

A chronological history of all non-active timelines (commonly referred to as **timeflows**) is shown under the Timeflow History tab. From this page, developers can curate their QA or Development work by renaming timeflows to match their testing history. Developers also have the ability to access old timeflow data by making a particular timeflow active. Navigate to the **Continuous Data workflows** section, then **VDB operations in the UI**. See Timeline history UI<sup>121</sup> for more details.

The VDB Details Timeline History tab now shows bookmarks along with the snapshots. The bookmark details will include **Name**, **Data Timestamp** or **Location**, **Log Delta**, and **Expiration**. An operation to delete the bookmark is available with the action button on the right of a bookmark line item.

vDBs > vN1C_23F vN1C_23F		Action
ID: 1-ORACLE_DB_CONTAINER-51 rerview Timeline History Bookmarks Hooks Access		
rch	Search (All)	Sort By     Timeline Activation
igin Source 0         Origin Timeline Location 0         Parent Source 0         Parent Timeline           CD0381EPDB2         Jun 15, 2024 9:57 PM GMT+5:30         VN1C_23F         Jun 15, 2024 10:		
Jul 9, 2024		1
• 2 Days Ago Jul 8, 2024		2
Snapshot 6:21 PM		Actions :
Bookmark 8July-BM-Action-6079281 - 6079282	Log Delta Expiration 1 Jul 31, 2024 12:0	0 AM GMT+5:30 Actions i
Bookmark 4PM-BM-1 - 4:00 PM	Log Delta Expiration +00:00:00 Jul 31, 2024 12:00	Delet
Snapshot 4:00 PM		Actions :

121 https://portal.document360.io/docs/timeline-history

Data Timestamp is only shown when available for the bookmark. Data Location is only shown when the bookmark is created using a location.

Log Delta is the delta between a bookmark's data timestamp and a snapshot's timestamp when the bookmark's data timestamp is available. It can also be the delta between a bookmark's location and a snapshot's location when the bookmark is created using a location.

# 6.2.3.4 VDB bookmarks

A list of all bookmarks generated on the selected VDB can be found under the "Bookmarks" tab. This page provides a list of all bookmarks allowing for general organization and actions (developers can use bookmarks as a refresh or provision point from the API).

DATA CONTROL <u>Data</u> Compliance Insigh TOWER	ts Admin		θ
VDB     AppFS_DEV     ID: 3-APPDATA_CONTAINER-276			
Overview Active Timeflow Timeflow History	Bookmarks Access		
Bookmark	Creation Date	Tags	Actions
Finance-App-1.0.3.2	Mar 27, 2023 11:21 AM	View Tags (1) >	I

# 6.2.3.5 VDB access

Users are able to audit which users have access to this particular VDB, what access group they belong to, and the associated permissions that each user has on that VDB. Admins are able to click on the "View" button to access further details under the access control screen related to that specific user.

DATA CONTROL <u>Data</u> Compliance Insig TOWER	hts Admin		
VDB			VDBs
< VDBs AppFS_DEV ID: 3-APPD/RA_CONTRINEP-276			De Destri De Castricaturat De Destrictions De Destri De Diciti, Indicitoti De Destri Killing De Destri De Diciti, Indicitoti De Destri De Stange logi De Anastan De India De Antoni De India por Sectore Destri De India
Overview Active Timeflow Timeflow History	Bookmarks Access		De SMARHUTTHELLE Ce SIMULOUTHER Ce SIM
User	Access Groups	Permissions	On 2013 On SMITCH, TARPELOW On LONGE On LIPCORE, TARPELOW
	1 >		
John Smith johnsmith@company.com	John Smith >	← CREATE_BOOKMARK ← CREATE_VDBGROUP View >	

# 6.2.3.6 VDB templates

Importing and removing imported VDB templates from connected engines is an available action from the **VDB Config Templates** page.

CONTROL TOWER	Home <u>Data</u> Compliance Insights Admin		admin 🔒
dSources	VDB Config Templates		
VDBs	An overview of VDB Config Templates across your Delphix infrastructure.		Create Template
Bookmarks	Search		Remove Imported Templates
Infrastructure	Name 1	Template Type Notes	
VDB Config Templates	Sample Template	Oracle Virtual Source	View >
	dj0404 template 2-	Oracle Virtual Source	View >
	dj0404 template-	Oracle Virtual Source	View >
		Items per page: 50 🔻	1 – 3 of 3 < >

# 6.2.3.6.1 Import templates

To import a template, select the engines from the list in the import dialog.

CONTRO TOWER	L Home <u>Data</u> Compliance Insight	a Admin		admin 😫
dSources	VDB Config Templates	Import VDB Config Templates		
VDBs	An overview of VDB Config Templates across your De	dj0404-1, dj1104-stage		
Bookmarks	Search			Search (All) V
Infrastructure	Name 个	Cancel Import	Template Type Notes	
VDB Config Templates	Sample Template		Oracle Virtual Source	View >
	dj0404 template 2-		Oracle Virtual Source	View >
	dj0404 template-		Oracle Virtual Source	View >
			Items per page: 50 👻	1-3 of 3 < >

# 6.2.3.6.2 Remove imported templates

To remove a template, select the engines from the list in the remove dialog.

CONTRO TOWER	DL Home <u>Data</u> Compliance Insight	s Admin		admin 🔒
dSources	VDB Config Templates	Remove Imported VDB Config Templates		
VDBs	An overview of VDB Config Templates across your De	Source Engine dj0404-1, dj1104-stage		
Bookmarks	Search			Search (All) 🗸 🗸
Infrastructure	Name 1	Cancel Remove	Template Type Notes	
VDB Config Templates	Sample Template		Oracle Virtual Source	View >
	dj0404 template 2-		Oracle Virtual Source	View >
	dj0404 template-		Oracle Virtual Source	View >
			Items per page: 50 *	1-3 of 3 < >

# 6.2.4 Managing replications

# 6.2.4.1 Introduction

DCT 9.0.0 introduces the feature to differentiate between the replicated objects and original objects in case of a parent and replicated engines, both are registered with DCT.

# 6.2.4.2 Prerequisites

One parent and one replicated engine is required with few replicated dSources and VDBs.

# 6.2.4.3 User interface

Convenient separation between the replicated objects(VDB/dSource/environments) and original objects.

ources	VDBs					Provision VDB
Bs	An overview of VDBs a	cross your Delphix infrastructure.				
okmarks	Search					Search (All) V
rastructure	Status	Name ↑	Туре	Engine	Tags	
B Config Templates	RUNNING	CDOMLOSR421FPDB1_MCD	Oracle	amit-engine	Add Tags >	View >
	N/A	CDOMLOSR421FPDB1_MCD Replica	Oracle	replicated-engine	Add Tags >	View >
	RUNNING	CDOMLOSR421FPDB2_BAF	Oracle	amit-engine	Add Tags >	View >
	N/A	CDOMLOSR421FPDB2_BAF Replica	Oracle	replicated-engine	Add Tags >	View >
	RUNNING	DBOMSR8A1718_LJS	Oracle	amit-engine	Add Tags >	View >
	N/A	DBOMSR8A1718_LJS Replica	Oracle	replicated-engine	Add Tags >	View >

• Users can filter the replicated object using the advanced filter.

CONTROI TOWER	Home Data	Compliance Insights Admin				
Sources	VDBs					Provision VDB
DBs	An overview of VDBs a	across your Delphix infrastructure.				
ookmarks	Search (is_replica EQ true)					Advanced Search ~
frastructure	Advanced Sea	rch				^
DB Config Templates	Delphix supports a	dvanced-based searching. See below to use the que	ery builder.			
	€ Is R	eplica • EQUAL TO •	True	•		
	Status	Name 1	Туре	Engine	Tags	
	N/A	CDOMLOSR421FPDB1_MCD Replica	Oracle	replicated-engine	Add Tags >	View >
	N/A	CDOMLOSR421FPDB2_BAF Replica	Oracle	replicated-engine	Add Tags >	View >
	N/A	DBOMSR8A1718_LJS Reolica	Oracle	replicated-engine	Add Tags >	View >

• All the actions on the replicated objects are disabled.

$\infty$	DATA CONTROL Home Da TOWER	ata Compliance	Insights Admin					θ
< VDBs Overvi	VDBs > CDOMLOSR421FPDB1_M CDOMLOSR421FPDB1 iD:2-ORACLE_DB_CONTAINER-37 ew Active Timeflow		Bookmarks	Access				Actions -
		Platform Oracle				Status N/A		Enable Disable Start Stop Delete Create Bookmark
Details Type Platform Version Size Engine	VDB Oracle 19.3.0.00 0.008 replicated		Tags	No tags ad	Edit	onment Details Iment Name	oracle-tgt Single Instance Linux	

- The status of the replicated objects are N/A.
- On the VDB provisioning wizard, replicated objects(VDB/dSources) are marked as replicated.

ision V	/DB		
Sou	Irce	Source Select an available Source or VDB from which to provision to your VDB.	
O Prov	vision Point	dSources VDBs	
Targ	et Environment	Search	
Targ	et Configuration	CDOMLOSR421FPDB1	
Polic	cies	CDOMLOSR421FPDB1 Replica	
Sum	nmary	CDOMLOSR421FPDB2	
		CDOMLOSR421FPDB2 Replica	
		DBOMSR8A1718	
		DBOMSR8A1718 Replica	
		Rems per page: 25 👻 1 – 6 of 6 <	
			Cancel Back Next St

# 6.2.4.4 API

Expand the section below to show search APIs that are updated to return three additional fields: is\_replica, namespace\_id, and namespace\_name. These fields are described below.

# Search APIs

1. Sources

GET: /sources

GET: /sources/{sourceId}
POST: /sources/search

#### 2. VDBs

GET: /vdbs
GET: /vdbs/{vdbId}
POST: /vdbs/search

#### 3. dSources

GET: /dsources
GET: /dsources/{dsourceId}
POST: /dsources/search

## 4. CDBs

GET: /cdbs
GET: /cdbs/{cdbId}
POST: /cdbs/search

#### 5. VCDBs

GET: /vcdbs
GET: /vcdbs/{vcdbId}
POST: /vcdbs/search

#### 6. Environments

GET: /environments
GET: /environments/{environmentId}
POST: /environments/search

#### 7. Dataset-groups

GET: /groups
GET: /groups/{groupId}
POST: /groups/search

# 8. Timeflows

GET: /timeflows
GET: /timeflows/{timeflowId}
POST: /timeflows/search

#### 9. Policies

GET: /virtualization-policies

GET: /virtualization-policies/{policyId}

POST: /virtualization-policies/search

## 10. Snapshots

GET: /snapshots

GET: /snapshots/{snapshotId}
POST: /snapshots/search

- 1. is\_replica : Boolean telling that this object id replicated or not.
- 2. namespace\_id : This field will only come for replicated objects and is essentially the namespace id of the replicated object.
- 3. namespace\_name : This field will only come for replicated objects and is essentially the namespace name of the replicated object.

# 6.2.4.5 Managing replication profiles

# 6.2.4.5.1 Overview

Data Control Tower (DCT) version 16.0.0 and above offers comprehensive CRUD (Create, Read, Update, Delete) functionalities for replication specifications directly within the Delphix Engines registered with DCT. This enhances the management and efficiency of replication processes.

# 6.2.4.5.2 Prerequisites

To leverage the new replication functionalities, you need:

- A running instance of DCT.
- At least one registered Delphix Engine.
- One or more dSources or VDBs on the engine.

# 6.2.4.5.3 Features

## 6.2.4.5.3.1 GUI access

- **Replication profiles Summary page**: View all known replication profiles, including details like name, source, target host, and mode.
- **Profile Creation Wizard**: Create new profiles using the guided wizard, initiated via the *+Replication Profile* button, available in the upper right corner of the page.

## 6.2.4.5.3.2 API support

- Endpoints: Create, update, delete, and execute replication profiles directly through API calls.
- **Replication Spec Parameters**: Greater visibility and control with the inclusion of previously absent parameters in the APIs.

#### 6.2.4.5.3.3 Profile creation in SDD mode

- Selective Data Distribution (SDD) mode (DCT 18.0.0 and up): Allows the creation of profiles where
  only masked VDBs can be selected.
- VDB selection rules:
  - Only one masked VDB per parent dSource.
  - No multiple sibling masked VDBs from the same unmasked dSource.
  - Parent dSource or VDB (and its lineage) not automatically included, except for some data for disk space optimization.
  - Environments containing database instances used in a replicated VDB are included.
  - Only necessary database instances and repositories for replicated VDBs are included.

CONTROL Home Data Compliance Insights	Admin	🌐 admin 😫
<pre>Profiles &gt; Spec-1 Spec-1 Source Engine. km-engine.dcol1.delphix.com Overview Source Objects</pre>		Actions -
Details 🗸 Edit	Target  Edit	Replication Parameters
Replication Mode Engine Data Replication     Replication Profile Tags       Name Spec-1     tag1: tag2       Description Spec-Desc-1	Target sj-2004	Automated Replication Enabled Frequency Every 30 minutes Encryption Enabled Maximum Bandwidth 2 MB Maximum Network Connections 2 Include existing source tags on replicas No

#### 6.2.4.5.4 Getting Started

Access the Replication Profiles page by navigating to Data > Replication in the DCT GUI.

CONTROL TOWER	Home Data Compliance	Insights Admin		<b>@</b>
dSources	Replication Pr	ofiles		+ Replication Profile
VDBs	View and manage replication			
Bookmarks	view and manage replication	i promes.		
Data Engines				Search
VDB Config Templates	Search			Search (All)
Replication				
	Name	Source	Target	Mode
	sdd-profile	nq-repl	nq-repl-tgt	MASKED_DATA_DISTRIBUTION
	test-profile	nq-repl	nq-repl-tgt	Engine Data Replication
	vault-profile	nq-repl	nq-repl-tgt	CONTINUOUS_VAULT

# 6.2.4.5.4.1 Creating and Setting Up Replication Profiles

Use the GUI wizard or API calls to set up new replication profiles by specifying parameters such as source, target, and replication mode.

#### Wizard sections

 Mode: Engine Data replication, Selective Data Distribution (SDD), and Continuous Vault are available options as of the latest version, DCT 20.0.0.

•	Mode	Mode Specify the purp	pose of replicating this data.				
	Details	C Replic	cate Engine Data	<	Selective Data Distribution	Secure in Continuous Vault	<ul> <li></li> </ul>
	Target Engines	objects on prer	ate some or all of a Delphix engine's s to another Delphix engine either mise or in the cloud. This is on for data migration and disaster		Replicate only the masked data to non- production target delphix engines with the same configuration.	This disaster recovery and ransomware solution frequently refreshes a secure virtual database (dSource) with production data from which to rapidly	
	Replication Objects		ry replication.			recover application data to any valid point in time prior to a disaster or attack.	
	Parameters						
	Summary						

**Details**: Includes Name, Description, and Tags (used in the DCT profile).

# **Create Replication Profile**

	Specify a name and optional description and tags for this replicatio
<ul> <li>Details</li> </ul>	
	Name
Target Engines	
Replication Objects	Description
Parameters	<b>Replication Profile Tags</b> Apply tags to this replication policy to enhance filtering and grant
	users and access groups to utilize this profile.

• Target Engines: Only target engines registered with DCT can be selected.

# **Create Replication Profile**

	Mode	Target Engine Select a target engin	e destination for replicas	created by this repicatio	n profile.			
	Details	Search					Search (All)	~
۲	Target Engines							
	Replication Objects	Status		Name/UUID	Туре	Host	Tags	
	Parameters	□ <b>∳</b> ∘	Inline	nq-repl ec2c9c0a-bf9d-a40	Virtualization 21.0.0.0	nq-repl.dlpxdc.co	Add Tags	>
	Summary	□ <b>∳</b> ○	Inline	nq-repl-tgt ec2df672-50e7-205	Virtualization 21.0.0.0	nq-repl-tgt.dlpxdc	Add Tags	>

- **Replication Objects**: Chosen relative to the source engine selected from the dropdown menu.
  - **Display Options**: View only selected or unselected objects.
  - Filtering: Filter the replication objects tree nodes using the search input.

 $\times$ 

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 $\times$ 

# **Create Replication Profile**

Mode	Replication Objects Select the objects to replicate.
Details	Source Engine     Display Option       km-engine     Show All
Target Engines	km-engine
Replication Objects	<ul> <li>Image: Second sec</li></ul>
Parameters	CDOMLOSRCA1D
Summary	□
	D DB0_7SY
	CDOMLOSRCA1DPDB1
	) DBOMSR3A85E9
	Testing DCT

- Parameters: Includes automated replication and traffic options similar to the Delphix Engine.
  - Tags: Existing source object tags can be incorporated onto replicas.

## **Create Replication Profile**

	Mode	Parameters
		Configure replication traffic parameters and optionally specify tags to be added to the replicas created from this replication profile.
	Details	Automated Replication
		Enable Automated Replication
	Target Engines	Every 1 Day(s) - at 12 * : 00 * AM *
	Replication Objects	
		Show Cron String Format
۲	Parameters	Traffic Options
		Enable Encryption
	Summary	Limit Bandwidth
		Maximum Bandwidth (MB)
		Maximum Network Connections
		1
		Replica Tags Automatically apply tags to replicas created by this replication profile.
		Include existing source tags on replicas
		Cancel Back Next Save Profile

• Summary: Review all configured details before saving the profile.

 $\times$ 

#### **Create Replication Profile**

Q M	Mode	Summary					
0	Details	Review the configuration for this replication profile.	Replication Parameters				
0 1	Target Engines	Replication Mode Replication Profile Tags Engine Data Replication No tags added	Automated Replication				
O F	Replication Objects	Name None	Encryption Disabled				
O F	Parameters	Description None	Maximum Network Connections 1				
• 5	Summary		Include existing source tags on replicas No				
		Source Objects					
		V 🖿 Oracle RAC					
		CDOMLOSRCA1D					
		⊜ =(1+1)					
		UDB0_7SY					
				Cancel	Back	Next	Save Profile

#### 6.2.4.5.5 Additional GUI Details

### 6.2.4.5.5.1 Replication profile List page

• View Button: Allows users to view and edit replication profile details directly from the list page. This is where existing replication profiles live.

CONTROL TOWER	Home Data Compliance	Insights Admin			🔅 admin 😫
dSources	<b>Replication Pro</b>	ofiles			+ Replication Profile
VDBs	View and manage replication				
Bookmarks	view and manage replication	promes.			
Data Engines					Search
VDB Config Templates	Search				(All)
Replication					
	Name	Source	Target	Mode	
	JK-test-1	km-engine	km-engine	Engine Data Replication	View >
	Profile 2	km-engine	km-engine	Engine Data Replication	View >
					1 to 36 of 36 < Page 1 of 1 >

### 6.2.4.5.5.2 Replication profile Details page

- Actions menu: Lists actions that can be performed on the replication profile.
  - Delete: Deletes the replication profile, redirecting users back to the list page.
  - Replicate Now: Initiates the replication process immediately, displaying operations in the monitoring bar.

 Start Failover (DCT 19.0.0 and up): Initiate a failover directly from the UI via Data > Replication > Replication Profile Details View > Actions > Start Failover. This helps minimize downtime during failover events.

DATA CONTROL Home <u>Data</u> Compliance TOWER	Insights	Admin	٥	admin 😫
Profiles > Spec-1         Source Engine: km-engine.dcol1.delphix.com         Overview       Source Objects         Details         Replication Mode         Engine Data Replication         Name         Spec-1         Description         Spec-Desc-1	✓ Edit	Target       Edit         Target       Automated Replication         sj-2004       Enabled         Frequency       Every 30 minutes         Encryption       Enabled         Maximum Bandwidth       2 MB         Maximum Network Connections       2         Include existing source tags on replicas       1		Actions  Replicate Now Delete  Edit
		2 Include existing source tags on		

- Overview tab: Organized into four informative tiles:
  - Details tile: Displays replication mode, name, and description.
  - Target tile: Shows the target host name.
  - **Replication Parameters tile**: Contains settings like Automated Replication, Frequency, Encryption, Bandwidth, Connections, and Tag Inclusion.
- Received Replicas list (DCT 19.0.0 and up): Access the Received Replicas list via Data > Data Engines > Engine Details View > Replication tab, which provides a comprehensive list of all received replicas.
- Execution History tab: Shows the history of executions, including:
  - · Last execution status and timestamp.
  - Start Time, End Time, Duration, Data Lag.
  - Edit options in each tile, accessible via the top-right corner.

#### 6.2.4.5.5.3 API endpoints

Create Replication Profile

POST /v3/replication-profiles

Update Replication Profile

PATCH /v3/replication-profiles/{replicationProfileId}

#### Delete Replication Profile

DELETE /v3/replication-profiles/{replicationProfileId}

Execute Replication Profile

POST /v3/replication-profiles/{replicationProfileId}/execute

#### 6.2.4.5.5.4 Key Parameters

- replication\_mode : Profile's replication mode.
- description : Brief description.
- schedule : Replication schedule.
- targetEngineId, targetHost, targetPort: Target engine's ID, hostname, and port.
- vdb\_ids , dsource\_ids : Lists of VDBs and dSources to replicate.
- tags : Key-value pairs for categorizing profiles.

### 6.2.4.5.5.5 Example API Calls

Create Replication Profile

```
curl -X 'POST' \
 'https://localhost/v3/replication-profiles' \
 -H 'accept: application/json' \
 -H 'Authorization: apk
1.4rJrWuVbB54W53ufEn6f5k8zDM9RUtOH4ciJtLGeVZNO0N6HnFt30WHMyj9WynKD' \
  -H 'Content-Type: application/json' \
  -d '{
  "name": "replication-profile-name",
 "replication_mode": "ENGINE_DATA_REPLICATION",
 "engine_id": 1,
  "target_engine_id": 2,
  "target_port": 8415,
  "description": "description",
  "schedule": "0 0 0 * * ?",
  "tags": [
    {
     "key": "key1",
      "value": "value1"
    },
    {
```

```
"key": "key2",
    "value": "value2"
    }
],
"enable_tag_replication": true,
"bandwidth_limit": 0,
"number_of_connections": 1,
"encrypted": false,
"automatic_replication": false,
"use_system_socks_setting": false,
"group_ids": [
    "1-GROUP-1"
]
}'
```

#### Update Replication Profile

```
curl -X 'PATCH' \
  'https://localhost/v3/replication-profiles/1-REPLICATION_SPEC-68' \
 -H 'accept: application/json' \
 -H 'Authorization: apk
1.4rJrWuVbB54W53ufEn6f5k8zDM9RUtOH4ciJtLGeVZNO0N6HnFt30WHMyj9WynKD' \
 -H 'Content-Type: application/json' \
 -d '{
 "name": "string",
 "description": "string",
  "target_engine_id": "string",
 "target_host": "string",
  "target_port": 65535,
  "schedule": "string",
  "vdb_ids": [
   "string"
 ],
  "dsource_ids": [
   "string"
  ],
  "cdb_ids": [
   "string"
  ],
  "vcdb_ids": [
   "string"
  ],
  "group_ids": [
   "string"
  ],
  "replicate_entire_engine": false,
  "bandwidth_limit": 0,
  "number_of_connections": 16,
  "encrypted": true,
  "automatic_replication": true,
  "use_system_socks_setting": true
```

}'

#### Delete Replication Profile

```
curl -X 'DELETE' \
    'https://localhost/v3/replication-profiles/1-REPLICATION_SPEC-68' \
    -H 'accept: application/json' \
    -H 'Authorization: apk
1.4rJrWuVbB54W53ufEn6f5k8zDM9RUtOH4ciJtLGeVZN00N6HnFt30WHMyj9WynKD'
```

#### 6.2.4.5.5.6 Other considerations

- Password Vaults: Not supported for replication operations.
- Profile IDs: Find IDs through the GET /v3/replication-profiles endpoint.

#### 6.2.4.5.5.7 Limitations

• **GUI operations**: Currently, only profile creation is supported through the GUI. Future updates will expand GUI functionalities to cover more operations.

### 6.2.4.6 Replication relationship

#### 6.2.4.6.1 Overview

DCT 11.0 release adds a functionality to get the primary and replica objects for a given object in DCT. Whenever DCT identifies that a replica object has been added to the engine, it creates a job to fetch the primary object information from its source engine. In addition, when replica objects are updated with primary object information, the primary objects are also updated with their children (replicas).

This feature requires that both source and target engines are registered in DCT.

#### 6.2.4.6.2 Prerequisites

A running instance of DCT, two instances of Delphix Engines, and some of the dSource and VDBs on one of those engines. A replication profile needs to be created from an engine that contains dSource and VDBs to replicate to another engine.

#### 6.2.4.6.3 Replication details

A replication details box will appear on the VDB or dSource tab showing the **Source Engine** and **Source VDB**/ **dSource** for replication.

Replication	
Source	
Source Engine:	mixed-engine
Source VDB:	VCDO_IF0
Replication	
<b>6</b>	
Source	
	mixed-engine
Source Engine: Source dSource:	CDOMLOSR421FPDB1

### 6.2.4.6.4 API changes

New fields have been added in the following APIs:

- GET /v3/dsources
- GET /v3/dsources/{dsourceId}
- POST /v3/dsources/search
- GET /v3/vdbs
- GET /v3/vdbs/{dsourceld}
- POST /v3/vdbs/search

The new fields are as follows:

- primary\_object\_id
- primary\_engine\_id
- primary\_engine\_name
- replicas
  - replica\_id
  - replica\_engine\_id
  - replica\_engine\_name
  - replica\_namespace\_id

6.2.4.6.4.1 VDB replica and primary object sample response:

```
curl --location 'http://localhost:8080/v3/vdbs' \
--header 'Authorization: apk {{authToken}}'
{
    "items": [
```

```
{
    "id": "1-ORACLE_DB_CONTAINER-11",
    "database_type": "Oracle",
    "name": "VCDO_IF0",
    "namespace_id": "1-NAMESPACE-2",
    "namespace_name": "ip-10-110-221-77-1",
    "is_replica": true,
    "is_locked": false,
    "database_version": "19.3.0.0.0",
    "size": 0,
    "storage_size": 2778624,
    "engine_id": "1",
    "masked": false,
    "content_type": "PDB",
    "parent_timeflow_timestamp": "2023-10-16T10:11:02Z",
    "parent_timeflow_timezone": "America/New_York,EDT-0400",
    "environment_id": "1-UNIX_HOST_ENVIRONMENT-3",
    "ip_address": "10.43.89.210",
    "fqdn": "ora-src.dcol1.delphix.com",
    "parent_id": "1-ORACLE_DB_CONTAINER-8",
    "parent_dsource_id": "1-ORACLE_DB_CONTAINER-8",
    "group_name": "Untitled",
    "engine_name": "e1",
    "cdb_id": "1-ORACLE_SINGLE_CONFIG-24",
    "creation_date": "2023-10-16T10:38:39.05Z",
    "hooks": {
        "pre_refresh": [],
        "post_refresh": [],
        "pre_self_refresh": [],
        "post_self_refresh": [],
        "pre_rollback": [],
        "post_rollback": [],
        "configure_clone": [],
        "pre_snapshot": [],
        "post_snapshot": [],
        "pre_start": [],
        "post_start": [],
        "pre_stop": [],
        "post_stop": []
    },
    "config_params": {
        "_cdb_disable_pdb_limit": "TRUE",
        "audit_file_dest": "'/u01/app/oracle/admin/CDOMLOSR421F/adump'",
        "audit_trail": "'DB'",
        "compatible": "'19.0.0'",
        "diagnostic_dest": "'/u01/app/oracle'",
        "dispatchers": "'(PROTOCOL=TCP) (SERVICE=CDOMLOSR421FXDB)'",
        "enable_pluggable_database": "TRUE",
        "log_archive_format": "'%t_%s_%r.dbf'",
        "max_pdbs": "4098",
        "memory_max_target": "1342177280",
        "memory_target": "1342177280",
```

```
"nls_language": "'AMERICAN'",
        "nls_territory": "'AMERICA'",
        "open_cursors": "300",
        "processes": "300",
        "remote_login_passwordfile": "'EXCLUSIVE'"
    },
    "mount_point": "/mnt/provision",
    "current_timeflow_id": "1-ORACLE_TIMEFLOW-11",
    "vdb_restart": false,
    "is_appdata": false,
    "primary_object_id": "1-ORACLE_DB_CONTAINER-6",
    "primary_engine_id": "1",
    "primary_engine_name": "e1"
},
    "id": "1-ORACLE_DB_CONTAINER-6",
    "database_type": "Oracle",
    "name": "VCDO_IF0",
    "is_replica": false,
    "is_locked": false,
    "database_version": "19.3.0.0.0",
    "size": 794755072,
    "storage_size": 32859648,
    "engine_id": "1",
    "status": "RUNNING",
    "masked": false,
    "content_type": "PDB",
    "parent_timeflow_timestamp": "2023-10-16T10:11:02Z",
    "parent_timeflow_timezone": "America/New_York,EDT-0400",
    "environment_id": "1-UNIX_HOST_ENVIRONMENT-1",
    "ip_address": "10.43.89.210",
    "fqdn": "ora-src.dcol1.delphix.com",
    "parent_id": "1-ORACLE_DB_CONTAINER-2",
    "parent_dsource_id": "1-ORACLE_DB_CONTAINER-2",
    "group_name": "Untitled",
    "engine_name": "e1",
    "cdb_id": "1-ORACLE_SINGLE_CONFIG-2",
    "creation_date": "2023-10-16T10:38:39.05Z",
    "hooks": {
        "pre_refresh": [],
        "post_refresh": [],
        "pre_self_refresh": [],
        "post_self_refresh": [],
        "pre_rollback": [],
        "post_rollback": [],
        "configure_clone": [],
        "pre_snapshot": [],
        "post_snapshot": [],
        "pre_start": [],
        "post_start": [],
        "pre_stop": [],
        "post_stop": []
```

{

```
},
            "config_params": {
                "_cdb_disable_pdb_limit": "TRUE",
                "audit_file_dest": "'/u01/app/oracle/admin/CDOMLOSR421F/adump'",
                "audit_trail": "'DB'",
                "compatible": "'19.0.0'",
                "diagnostic_dest": "'/u01/app/oracle'",
                "dispatchers": "'(PROTOCOL=TCP) (SERVICE=CDOMLOSR421FXDB)'",
                "enable_pluggable_database": "TRUE",
                "log_archive_format": "'%t_%s_%r.dbf'",
                "max_pdbs": "4098",
                "memory_max_target": "1342177280",
                "memory_target": "1342177280",
                "nls_language": "'AMERICAN'",
                "nls_territory": "'AMERICA'",
                "open_cursors": "300",
                "processes": "300",
                "remote_login_passwordfile": "'EXCLUSIVE'"
            },
            "mount_point": "/mnt/provision",
            "current_timeflow_id": "1-ORACLE_TIMEFLOW-6",
            "vdb_restart": false,
            "is_appdata": false,
            "replicas": [
                {
                    "replica_id": "1-ORACLE_DB_CONTAINER-11",
                    "replica_engine_id": "1",
                    "replica_engine_name": "e1",
                    "replica_namespace_id": "1-NAMESPACE-2"
                }
            ]
        }
    ],
    "response_metadata": {
        "total": 2
    }
}
```

## 6.2.4.6.4.2 Sample response for dSource change:

```
curl --location 'http://localhost:8080/v3/dsources/search' \
--header 'Content-Type: application/json' \
--header 'Authorization: apk {{authToken}}' \
--data '{
    "filter_expression" : "engine_id EQ '\''1'\'''
}'
{
```

```
"items": [
    {
        "id": "1-ORACLE_DB_CONTAINER-10",
        "database_type": "Oracle",
        "name": "CDOMSHSR6706PDB2-NO-CHILD",
        "namespace_id": "1-NAMESPACE-2",
        "namespace_name": "ip-10-110-221-77-1",
        "is_replica": true,
        "database_version": "19.3.0.0.0",
        "content_type": "PDB",
        "data_uuid": "46f1613b223b1dd5364bdc3ecfd2755d",
        "storage_size": 180355584,
        "creation_date": "2023-10-16T10:09:00.567Z",
        "group_name": "Untitled",
        "engine_id": "1",
        "source_id": "1-ORACLE_PDB_CONFIG-20",
        "engine_name": "e1",
        "cdb_id": "1-ORACLE_SINGLE_CONFIG-23",
        "current_timeflow_id": "1-ORACLE_TIMEFLOW-7",
        "is_appdata": false,
        "primary_object_id": "1-ORACLE_DB_CONTAINER-4",
        "primary_engine_id": "1",
        "primary_engine_name": "e1"
    },
    {
        "id": "1-ORACLE_DB_CONTAINER-12",
        "database_type": "Oracle",
        "name": "CDOMLOSR421FPDB2",
        "is_replica": false,
        "database_version": "19.3.0.0.0",
        "content_type": "PDB",
        "data_uuid": "837bbc258a479ff86dbce5656beeba2a",
        "storage_size": 236433920,
        "creation_date": "2023-10-17T10:19:19.496Z",
        "group_name": "Untitled",
        "enabled": true,
        "engine_id": "1",
        "source_id": "1-ORACLE_PDB_CONFIG-7",
        "status": "RUNNING",
        "engine_name": "e1",
        "cdb_id": "1-ORACLE_SINGLE_CONFIG-2",
        "current timeflow id": "1-ORACLE TIMEFLOW-12",
        "is_appdata": false
    },
    ł
        "id": "1-ORACLE_DB_CONTAINER-2",
        "database_type": "Oracle",
        "name": "CDOMLOSR421FPDB1",
        "is_replica": false,
        "database_version": "19.3.0.0.0",
        "content_type": "PDB",
        "data_uuid": "834a794e51ec096059922dc06625fb66",
```

```
"storage_size": 245758976,
    "creation_date": "2023-10-16T10:08:35.425Z",
    "group_name": "Untitled",
    "enabled": true,
    "engine_id": "1",
    "source_id": "1-ORACLE_PDB_CONFIG-6",
    "status": "RUNNING",
    "engine_name": "e1",
    "cdb_id": "1-ORACLE_SINGLE_CONFIG-2",
    "current_timeflow_id": "1-ORACLE_TIMEFLOW-2",
    "is_appdata": false,
    "replicas": [
        {
            "replica_id": "1-ORACLE_DB_CONTAINER-8",
            "replica_engine_id": "1",
            "replica_engine_name": "e1",
            "replica_namespace_id": "1-NAMESPACE-2"
        }
    ]
},
{
    "id": "1-ORACLE_DB_CONTAINER-21",
    "database_type": "Oracle",
    "name": "DSOURCE-WITH-CUSTOM-POLICY",
    "is_replica": false,
    "database_version": "19.3.0.0.0",
    "content_type": "PDB",
    "data_uuid": "dd4216e99ee17e8a7afa97cce012aa42",
    "storage_size": 181809664,
    "creation_date": "2023-10-18T13:09:30.299Z",
    "group_name": "Untitled",
    "enabled": true,
    "engine_id": "1",
    "source_id": "1-ORACLE_PDB_CONFIG-11",
    "status": "RUNNING",
    "engine_name": "e1",
    "cdb_id": "1-ORACLE_SINGLE_CONFIG-3",
    "current_timeflow_id": "1-ORACLE_TIMEFLOW-21",
    "is_appdata": false
},
{
    "id": "1-ORACLE DB CONTAINER-4",
    "database_type": "Oracle",
    "name": "CDOMSHSR6706PDB2-NO-CHILD",
    "is_replica": false,
    "database_version": "19.3.0.0.0",
    "content_type": "PDB",
    "data_uuid": "46f1613b223b1dd5364bdc3ecfd2755d",
    "storage_size": 190537728,
    "creation_date": "2023-10-16T10:09:00.567Z",
    "group_name": "Untitled",
    "enabled": true,
```

```
"engine_id": "1",
        "source_id": "1-ORACLE_PDB_CONFIG-10",
        "status": "RUNNING",
        "engine_name": "e1",
        "cdb_id": "1-ORACLE_SINGLE_CONFIG-3",
        "current_timeflow_id": "1-ORACLE_TIMEFLOW-4",
        "is_appdata": false,
        "replicas": [
            {
                "replica_id": "1-ORACLE_DB_CONTAINER-10",
                "replica_engine_id": "1",
                "replica_engine_name": "e1",
                "replica_namespace_id": "1-NAMESPACE-2"
            }
        ]
    },
    {
        "id": "1-ORACLE_DB_CONTAINER-8",
        "database_type": "Oracle",
        "name": "CDOMLOSR421FPDB1",
        "namespace_id": "1-NAMESPACE-2",
        "namespace_name": "ip-10-110-221-77-1",
        "is_replica": true,
        "database_version": "19.3.0.0.0",
        "content_type": "PDB",
        "data_uuid": "834a794e51ec096059922dc06625fb66",
        "storage_size": 226567680,
        "creation_date": "2023-10-16T10:08:35.425Z",
        "group_name": "Untitled",
        "engine_id": "1",
        "source_id": "1-ORACLE_PDB_CONFIG-22",
        "engine_name": "e1",
        "cdb_id": "1-ORACLE_SINGLE_CONFIG-24",
        "current_timeflow_id": "1-ORACLE_TIMEFLOW-9",
        "is_appdata": false,
        "primary_object_id": "1-ORACLE_DB_CONTAINER-2",
        "primary_engine_id": "1",
        "primary_engine_name": "e1"
    }
],
"response_metadata": {
    "total": 6
}
```

}

# 6.2.4.7 Replica insights

#### 6.2.4.7.1 Overview

DCT 20.0.0 introduces new replication insights, such as the replication policy list of an engine and a detailed view of a replica, in addition to failback support.

A source and target engine connected to DCT with one or more replication profiles.

#### Replication policy list of an engine

This feature allows users to view the list of replication policies associated with a particular engine, and is available by navigating to **Data > Data Engines > Engine Details View > Replication tab**.

DATA CONTROL Home TOWER	Data Compliand	ce Insights Admin				<b>e e</b>
Overview Environments	Deplication d	Sources VDBs Access				Actions -
Profiles	Replication d	Sources VDBS Access				
Last Replication Status		Profile Name	Target Location	Mode		
Jul 27, 2024 12:00 AM PDT				Continuous Vault	View >	
Jul 27, 2024 3:53 PM PDT				Engine Data Replication	View >	
Jul 27, 2024 3:14 PM PDT				Engine Data Replication	View >	
Jul 16, 2024 1:20 PM PDT				Engine Data Replication	View >	
					1 to 4 of 4	< Page 1 of 1 >
<b>Received Replicas</b>						
Last Replication Status		Replica Name	Source	Mode		
			No Rows To Show			

#### Replica detail view

This feature allows users to see detailed information about a received replica. Use the **View** button available for each replica in the received replica list under **Data > Data Engines > Engine Details View > Replication tab**.

• In the **Overview** tab, details of the replica and its corresponding replication policy's details are displayed. If the replication policy is not available on DCT, a banner is shown to indicate.

$\langle X \rangle$	DATA CONTROL <b>Home</b> TOWER	Data Compliance	Insights	Admin						٥	9
0	connected to the Data Con	le to connect to the replic	cation policy	that created t	this replica. Th	nerefore, some	e policy related i	d inform	mation is not available. Possible causes are that the policy has been deleted or the engine with the policy is not		×
Detail								F	Replication Parameters		
Replicati Unavailat	ion Mode ble		Replication No tags ad	n Profile Tag ded	s			ι	Unavailable		
Name Discriptio None Source Unavailat Target											

#### Failback support

This is a new checkbox option for creating a failback replica during failover that can be launched from the Failover window at **Data > Replication > Replication Policy or Replica Details View > Actions > Start Failover**.

CONTROL Home Data Complian	ice Insights Admin			٥	0
				Actions	•
Failover Successful     Consolidated UNIX_HOST "     Consolidated POLICY_REFRESH "None:Refres     Commit Failover Failback	.delphix.com" with " hPolicy" with "None:RefreshPolicy"	.delphix.com*			
Overview Replicated Objects Execution His	tory				
Details			<b>Replication Parameters</b>		
Replication Mode Engine Data Replication	Replication Profile Tags No tags added		Automated Replication Disabled		
Name			Maximum Bandwidth 0 MB/s		
Discription None			Maximum Network Connections 1		
Source			Encryption Disabled		
Target			Include existing source tags on replicas No		

# 6.2.5 Managing policies

The **Policies** section in Data Control Tower (DCT) provides an organized and centralized view of all policies, including Replication Retention, Retention, SnapSync, VDB Refresh, and VDB Snapshot policies. This guide explains how to navigate, view, and manage them.

## 6.2.5.1 DCT-Managed policies

DCT-managed policies are centrally managed within DCT for deployment on multiple Delphix Continuous Data or Compliance Engines. These policies are identified by a DCT\_Managed prefix in their name on the Delphix Engine itself, but the name in DCT will remain the same.

## 6.2.5.2 Accessing policies

To view policy data in DCT:

- 1. Navigate to **Data > Policies**.
- 2. Expand the Policies tab to see the list of all available policies by type with key column details:
  - DCT Managed: Indicates whether this is a DCT Managed policy.
  - Engine: Specifies which Delphix Engine the policy applies to.
    - Note, since DCT Managed policies can be applied to multiple engines, results for them are not shown in this column.
  - Tags: Lists any tags associated with the policy.
  - More Details: Provides additional policy information.

CONTROL TOWER	Home Data Compliance Insights Admi	n					😳 Bootstrap Admin	
Data Management >     H       Data Management >     Policies \       Policies \     Replication       Replica Retention Policies     Retention Policies       SnapSync Policies     VDB Refresh Policies       VDB Snapshot Policies >     Data Infrastructure >	Replication Policies							
Policies ~	View and manage replication policies.						+ Replication Policy	
Replication	view and manage replication policies.							
							Search	
Retention Policies	Search						(All)	
SnapSync Policies								
VDB Refresh Policies	Last Replication Status	Name	Source	Target	Mode			
	Nov 19, 2024 2:23 PM PST	test	nq-dev2	nq-dev2	Engine Data Replicatio	n	View >	
Data Infrastructure >								

## 6.2.5.3 Viewing policy details

Click on a policy to view its detailed information in the Overview tab, which includes:

- Created By: The user who created the policy.
  - · Engine-managed policies will only show the engine name.
  - DCT-managed policies will show the user who created it.
- Created At: A timestamp of when the policy was created.
- Configuration: Additional information about the policy's configuration.
- Tags: Lists any tags associated with the policy.

The **Policy Assignments** tab at the top lists the dSources and/or VDBs to which the policy is applied.

ShapSync Policies > snapsync-test2 C Back ShapSync-test2 1+Policy_ship-test Overview Policy Assignments Access		Actions - Convert to DCT Managed
Details Created By	Actions - Convert to DCT Managed	
ng dev2 Created At	At 03:48 PM, only on Monday (US/Pacific) At 03:48 PM, only on Tuesday (US/Pacific) At 03:48 PM, only on Wednesday (US/Pacific) At 03:48 PM, only on Thurady (US/Pacific) At 03:48 PM, only on Friday (US/Pacific)	

## 6.2.5.4 Converting a Delphix Engine policy to DCT Managed

To convert an existing Delphix Engine policy into a DCT Managed policy:

- 1. Navigate to the **Data > Policies** list.
- 2. Select the desired policy and click View.
- 3. Expand the **Actions** dropdown in the top-right corner and choose **Convert to DCT Managed** (shown in the image above).
- 4. A popup will confirm that converting the policy enables updates within DCT and allows application to objects across different engines.

## 6.2.5.5 dSource/VDB policy management

To access the details page of a dSource/VDB with a policy, click the aforementioned **Policy Assignments** tab of a policy and select an associated dSource/VDB where its assigned. The general dSource list can be found by navigating to **Data > Data Management > dSources [or] VDBs**.

In the dSource/VDB details page, a new **Policies** tab has been added likewise, which all policies associated with the selected dSource/VDB.

To apply or remove policies in the Policies tab on a dSource/VDB:

- 1. Select the **Change Policy** button on the desired policy.
- 2. Select or deselect policies in the list that appears to apply or unapply them from the dSource/VDB.

ONTROL Home Data Compliance Insights Admin TOWER			🕮 Bootstrap Admin 😫
dSources > DBOMSRDC200B C Back DBOMSRDC200B	Select SnapSync Policy	×	Actions +
Overview Timeline Bookmarks Policies Hooks Access	Search		
Retention Policy	Default SnapSync	~	
retention-test	None:SyncPolicy	~	✓ Change Policy
Snapshots will be removed after 1 day(s)	☑ snapsync-test	~	
Logs will be removed after 1 day(s)	snapsync-test2	v	
	Items per page. 25 👻 1 - 4 of 4		
		Cancel Confirm	

# 6.2.6 Managing bookmarks

# 6.2.6.1 Global Bookmarks List

DCT provides a near real-time list of all bookmarks across all VDBs and VDB-groups and their associated VDB(s). From the below screen, Delphix administrators can easily view and manage their bookmark estate.

CONTRO TOWER	DL <u>Data</u> Compliance Ins	ights Admin			θ
dSources	Bookmarks				
VDBs	An overview of Bookmarks across you	ur Delphix infrastructure.			
Bookmarks	Search			Search (All)	~
Environments	Bookmark	VDB	Creation Date	Tags	
Infractoriations	BM1	1-ORACLE_DB_CONTAINER-4	Mar 27, 2023 7:29 AM	View Tags (1) >	
Infrastructure	Finance-App-1.0.3.2	3-APPDATA_CONTAINER-276	Mar 27, 2023 11:21 AM	View Tags (1) >	
VDB Config Templates					

Support has been added for the creation of bookmarks for dSource snapshots, similar to VDB snapshots. These properties have been added:

- inherit\_parent\_tags is a new property added in the request payload. This indicates whether this bookmark should inherit tags from the parent dataset.
- dsource\_ids is a new property in the create bookmark response. This indicates the list of dSource IDs associated with this bookmark.

The Bookmarks list now has additional search capabilities on the dSource Details page. The VDB Details page also has search functionality and a list of bookmarks compatible with said VDB. Columns show the Source and Expiration Date of a bookmark.

In DCT 18.0.0, bookmarks are no longer deleted by the system when all its datasets are removed from DCT. These bookmarks will only be removed when they expire or are manually deleted. DCT will automatically delete all bookmarks linked to a VDB when the VDB does not exist anymore, the same is applied to VDB groups.

# 6.3 Insight reports

# 6.3.1 Activity Audit Log summary

The Activity Audit Log Summary provides a high-level audit log summary capturing the utilization of DCT by displaying user activity and the historical count of actions executed within the platform. This concise report enables stakeholders to quickly identify trends, monitor user engagement, and assess the overall effectiveness of data governance processes.

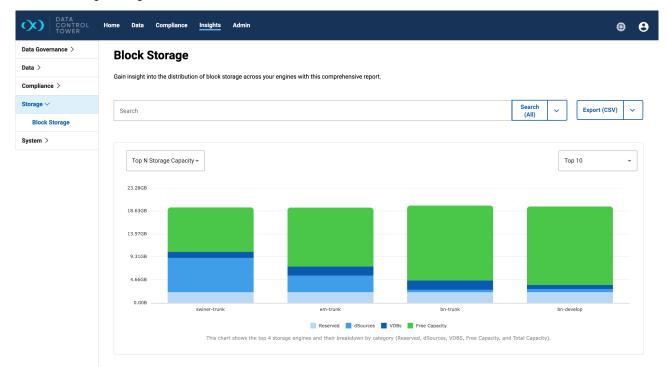
# 6.3.2 Block Storage report

A

This report provides users with a comprehensive view of storage usage across different engines. With this report, users can easily identify the engines that are utilizing the most storage and take necessary action to optimize storage usage.

In addition, there are three distinct charts to help better understand storage usage across engines. The search can be utilized in order to filter out engines. All three charts only include data for engines that match the search criteria. They are exemplified below.

• **Top N Storage Capacity chart**: Shows a breakdown of the current storage usage across the top 10 or 15 largest engines.



• **Capacity chart**: Shows the historical storage usage and free space across all engines. This chart shows data for the past 3 or 6 month and supports an optional projection of used capacity for that same timeframe.

Data for the current day (UTC time zone) includes additional system data that is not taken into account for the historical data points.

CONTROL TOWER	Home Data Compliance Insig	hts Admin							٥
Data Governance >	Block Storage								
Data >	Gain insight into the distribution of bl								
Compliance >	Gain insight into the distribution of bi	ock storage across your	engines with this comprehen	sive report.					
Storage 🗸	Search					Search	,	Export (CSV	
Block Storage						(All)			
System >									
	Capacity *					Show Projection	3 m	onths	Ŧ
	93.13GB		Today						
	74.51GB								
	55.88GB								
	37.25GB								
	18.63GB								
	0.00B February	March	April	Мау	June	July			Augu
		This chart shows your over the last 3 mo	current used and free storage	Free Capacity Used Capa space. The projection estimat es additional system data tha	city (Projected) res future usage based on the avera t is not stored in the historical data	ge change points.			

• **Top 5 Engines Storage Usage chart**: Shows the historical usage capacity for the 5 largest engines. This chart also shows data for the past 3 or 6 month with an optional projection of used capacity.

Data for the current day (UTC time zone) includes additional system data that is not taken into account for the historical data points.

ta Governance >	Block Storage	
a >		
npliance >	Gain insight into the distribution of block storage across your engines with this comprehensive report.	
rage 🗸	Search Search Y	rt (CSV) 🗸
lock Storage	(All)	
em >		
	Top 5 Engines Storage*	-
	37.2568	
	27.94GB	
	18.63GB	
	9.3168	
	0.008	
	February         March         April         May         June         July            em-trunk         em-trunk (Projected)         swiner-trunk (Projected)         en-trunk (Projected)	Augu
	This chart depicts the historical storage change for the top-5 engines. The projection estimates future usage based on the average	

## 6.3.3 Central Governance insights

DCT provides global reporting of real-time statuses. This section will break down all of the reports in the **Insights** section of DCT.

0	All insight dashboards can be exported to CSV or JSON format.

## 6.3.4 Compliance Job Executions report

The Compliance Job Executions Report dashboard offers a comprehensive overview of the compliance jobs executed within DCT, by presenting key metrics that enable stakeholders to assess the efficiency and effectiveness of their data governance efforts.

# 6.3.5 Continuous Compliance Engine Performance report

The Engine Performance dashboard provides users with a comprehensive view of performance information for Delphix Continuous Compliance Engines. The performance metrics include system CPU utilization, system memory usage, latency and throughput details for Disk protocols, and network throughput.

CONTROL TOWER	Home Data Compliance Insights Admin	<b>e 8</b>
Storage Summary	Compliance Engine Performance	
VDB Inventory	Get a comprehensive view of your Delphix Compliance engines with this report, detailing various performance metrics for each compliance engine.	
dSource Inventory	eet a comprenentier e neu of your perprint comprismer engineer men une report, actaining randour performance menter for each comprismer engine.	
Consumption Metrics	Search Search Last 6 hours - Export	(CSV) V
Data Engine Performance	Search (All) Case of hours Cas	
Compliance Engine Performance		
Job Executions	write) write)	roughput (tx)
Activity Audit Logs	Avg 3.5% 8GB Avg 0.651ms Avg 479KB/s Avg 57 Avg 12KB/s Avg 3KB/s	
	Avg 22.2% Avg 543KB/s Avg 543KB/s Avg 563 Avg 1KB/s Avg 50KB/	3
	1 to 2 of 2 < Pa	ge1of1 >

# 6.3.6 Continuous Data Engine Performance report

The Engine Performance dashboard provides users with a comprehensive view of performance information for Delphix Continuous Data Engines. The performance metrics include system CPU utilization, system memory usage, latency, IOPS, and network throughput details for Disk, NFS, and iSCSI protocols.

CONTROL TOWER	Home Data Compliance Insights Admin	@ <b>8</b>
Storage Summary	Data Engine Performance	
VDB Inventory	Get a comprehensive view of your Delphix Data engines with this report, detailing various performance metrics for each data engine.	
dSource Inventory	ou a completensiste nen of you beiprix data engines mai ans report, actaining various performance mentes for each data engine.	
Consumption Metrics	Search Search F	xport (CSV) 🗸
Data Engine Performance	Search (All) Last 6 hours - E	
Compliance Engine Performance		
Job Executions	Engine Name CPU Cores CPU Utilization Total Memory Disk Latency ISCSI Latency NFS Latency Network (read + write) (read + write) (read + write) Throughput (rx)	Network Throughput (tx)
Activity Audit Logs	Engine 1 2 Avg 6,1% Avg 98/8/s	Avg 235KB/s
	1 to 1 of 1 <	Page 1 of 1 >

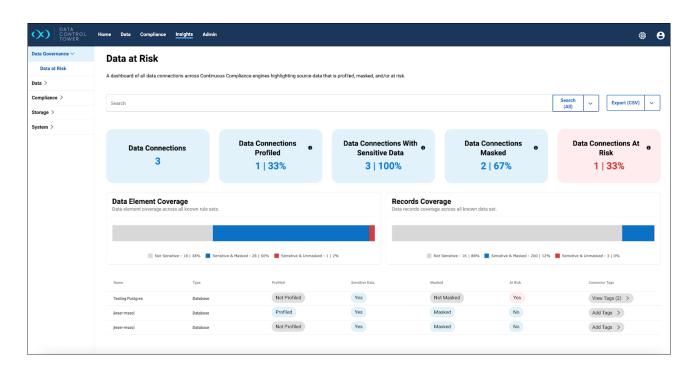
By default, a fix set of data columns are shown. Users have the flexibility to add or remove columns based on their preferences.

CONTROL TOWER	Home Data Compliance Insights Admin	θ
Storage Summary	Data Engine Performance	
VDB Inventory	Get a comprehensive view of your Delphix Data engines with this report, detailing various performance metrics for each data engine.	
dSource Inventory	Get a comprehensive view of your beginns bata engines with this report, detailing various performance metrics for each data engine.	
Consumption Metrics	Search Search Last 6 hours Export (CSV)	$\overline{}$
Data Engine Performance	Search Call Cast 6 hours Cast Export (CSV)	<u> </u>
Compliance Engine Performance		
Job Executions	Engine Name CPU Cores CPU Utilization Total Memory Disk Latency (read + write) = III (read + write) Network Network Throughput (rx) Throughput (rx)	
Activity Audit Logs	Engine 1 2 Avg 6% Avg 1.73m S Avg 98KB/s Avg 230KB/s Avg 230KB/s	$\checkmark$
	Engine Name	
	CPU Cores CPU Utilization	
	Z Tatal Memory	
	Disk Latency (read)	
	Disk Latency (write)	
	Disk Latency (read + write)	
	1 to 1 of 1 < Page 1 of 1 >	
No operations to show	View All >	) ×

# 6.3.7 Data Risk report

The Data Risk report is available in DCT version 16.0.0 and above. It provides visibility into data risk across your organization by aggregating metrics and insights from all Continuous Compliance Engines, including their environments and jobs, to give governance stakeholders a global overview of potential risks in sensitive data. More information on this report can be found in the Data Risk report<sup>122</sup> page.

<sup>122</sup> https://dct.delphix.com/docs/latest/data-risk-report



# 6.3.8 dSource Inventory report

The dSource Inventory report provides users with a comprehensive list of all the dSources created in the DCT platform and their identification metadata.

## 6.3.9 Global State report

The Compliance Engine (Global) State report provides the users with an overview of which engines are in sync and can be used to horizontally scale a compliance job. The users should use the **Engine Configuration Revision Hash** (Global Object Revision Hash) to determine if engines are synced – they have identical global object like (algorithms, rule sets, domains, etc.). Search filtering and sorting can be used to find all engines that are in-sync, and also determine if an engine has fallen out of sync. If the user wants to take action by then syncing an un-synced engine, they can do so from the Hyperscale Orchestrators' details page via the **Manually Deploy Job Dependencies** action menu.

CONTROL TOWER	Home Data Complianc	e Insights Admin				٥	9
Data >	Engine State						
Compliance $\vee$	-		s, offering a clear view of whether these	a configurations are in synal	branization or if they or	o boginning to divorgo	
Job Executions	through the engine configu		s, othering a creat view of whether these	e configurations are in synch	nonization of it they ar	e beginning to diverge	
Engine Performance							
Engine State	Search				Search (All) ✓	Export (CSV)	~
Storage >							
System >	Engine Name	Jobs	Connectors	Rulesets	Engine Configuration	n Revision Hash	
	masking-2	0	2	2	9ddb381664fb4956	d66908118d16d75a4abd0ece	e
	masking	0	2	2	9ddb381664fb4956	d66908118d16d75a4abd0ec	e
					1 to 2 of 2	< Page 1 of 1 >	

## 6.3.10 Source Ingestion Metrics

The Data Source Ingestion Metrics dashboard is designed to help users find their virtualization source ingestion metrics, which are often required for contract renewal purposes. The dashboard contains the data sources and informs the user of the total size of that ingestion source.

## 6.3.11 Storage Savings report

The Storage savings report illustrates how Delphix is effectively reducing storage costs through the implementation of data virtualization. The data in the table shows space metrics for each dSource and its child/descendant VDBs. The tiles above show the aggregates across all the pages of the table. The tiles will update to reflect the results in the table as the result of any search filtering.

CONTROL TOWER	Home Data Compliance	Insights Admin						
lata Governance >	Storage Saving	js						
compliance >	This report illustrates how Dele	lphix is effectively reducing your storage co	ests through the implementation of	virtualization.				
torage 🗸	Search					Search (All) V Export (CSV) V		
Block Storage								
Storage Savings								
ystem >	dSource Count 25 Storage without Delphix Assumes only VDB timelines are standard databases 118GB		v	DB Count		<b>nated Savings %</b> B timelines are standard databases		
				35		87.3%		
			Storag	e with Delphix 15GB		imated Savings without Delphix - Storage with Delphix) 103GB		
	dSource	# of VDBs	Storage without Delphix	Storage with Delphix	Estimated Savings	Estimated Savings %		
	dbdhcp3-develop	2	24GB	1GB	23GB	94%		
	dbdhcp3-develop dbdhcp3	2	24GB 6GB	1GB 783MB	23GB 5GB	94% 87.1%		

Savings are reported as the storage you would need without Delphix versus the storage Delphix is using for those same objects. The difference between the two is then used to show the savings and savings percentages.

Delphix's dataset timeflows/timelines enable users to navigate through different data states at various time points, mimicking having multiple dataset copies, thus offering significant storage savings. This functionality, known as "VDB Refresh," is typically external, requiring separate data copies. Users interested in the storage Delphix saves for only the current data state can toggle the current active timeline columns.

These current active timeline metrics are available on engine versions 22.0.0.0 or later. Columns for these metrics are hidden by default if any dSources come from older engines but will appear when all dSources are from compatible newer engines. Although the default view focuses on the current active timeflow, metrics for all timeflows remain accessible via the column menu for users needing broader data insights.

## 6.3.12 VDB Inventory report

The VDB Inventory report provides users with a comprehensive list of all the Virtual Databases (VDBs) created in the DCT platform and their identification metadata.

# 6.3.13 Oracle Container Database Inventory report

This report provides a comprehensive list of all Container Databases (CDBs) and virtual Container Databases (vCDBs). This report features an expandable list that reveals pluggable data associated with each CDB or vCDB, providing in-depth visibility into your Oracle database environment at a glance.

CONTROL TOWER	Home Data Compliance	Insights Admin				<b>e e</b>
Data 🗸	Oracle Contai	ner Database Ir	ventorv			
VDB Inventory		e multitenant architecture CD	-			
dSource Inventory Engine Performance	vCDBs CDBs					
Oracle Container Database Inventory	Search					Search (All) ~
Compliance >						
Storage >	Status	Name	Туре	Infrastructure	Engine	Tags
System >	> RUNNING	CDBC_MPW	vCDBs	sg-oracle-tgt	sg2802	View Tags (4) >
	> RUNNING	VCCD_MGN	vCDBs	sg-oracle-tgt	sg2802	Add Tags >
-						1 to 2 of 2 < Page 1 of 1 >

# 6.3.14 Data Risk report

Data Control Tower (DCT) version 16.0.0 and above introduces the Data Risk report, offering an in-depth view of your organization's data security posture by presenting global visibility metrics aggregated across all data connections of every connected Continuous Compliance Engine. This is crucial for identifying and mitigating potential data risks in sensitive data.

While the DCT version must be 16.0.0 or above, the Continuous Compliance Engine enhancements from version 20.0.0 and above are required to obtain database record counts by connectors. Thus, connected Continuous Compliance Engines with versions prior to 20.0.0.0 will not display record counts, and a warning message will replace the Records Coverage chart.

# **Records Coverage**

Data records coverage across all known data set.

## **Incomplete Data**

Cumulative record counts will be inaccurate as one or more rulesets are missing record counts. This will occur when a compliance engine with version earlier than 20.0.0.0 is registered or when one or more rulesets have not finished their initial refresh.

Currently, the report only includes database connectors. File and mainframe dataset connectors are not covered and will not appear in the report's UI table.

# 6.3.14.1 Feature list

A

#### Global visibility metrics

At the heart of the report are the global visibility metrics, presented through a combination of billboards and charts at the top of the page:

- Billboards: Show data connection counts across five categories.
  - i. Total number of data connections
  - ii. Data connections with at least one successful profiling job
  - iii. Data connections identified with sensitive data
  - iv. Data connections with at least one successful masking job
  - v. Data connections at risk (sensitive but not masked)

### Detailed data insights

- Charts: Offer insights into the count of data elements (e.g., database columns) and records in three categories, listed below. Legends and tooltips provide exact counts and percentages for each category, enhancing the understanding of your data's sensitivity and protection status.
  - i. Not sensitive
  - ii. Sensitive and masked
  - iii. Sensitive and unmasked

- Report Scheduling
  - A new report type, DATA\_RISK\_SUMMARY, has been added to the Reporting Schedule. This allows users to schedule regular updates on data risk metrics via email, at predefined intervals, to allow continuous monitoring and timely risk assessment.
- GUI additions
  - Below the charts, a table presents detailed data risk metrics for each data connection. Users
    can customize this table by toggling additional fields on or off through the column menu, for
    more relevant data insights.

Name	=	 Profiled	Sensitive Data	Masked	At Risk	Connector Tags
Testing Postgres	Search	Not Profiled	Yes	Not Masked	Yes	View Tags (2) >
jleser-mssql	Sensitive Data	Profiled	Yes	Masked	No	Add Tags >
jleser-mssql	At Risk	Not Profiled	Yes	Masked	No	Add Tags >
	Connector Tags					
	Last Profiled Date					
	Last Masked Date					
	Engine	 _				1 to 3 of 3 < Page 1 of 1 >

The report also supports exporting of information in both CSV and JSON formats. This
includes both global metrics and per-connection metrics for in-depth data analysis and
reporting.

#### 6.3.14.1.1 Terminology and definitions

To help provide clarity and understand the definitions for key terms used within this report, refer to the definitions below.

Records Coverage Data records coverage across all known data set.	
Not Sensitive 1,442   88%	
Not Sensitive - 1K   88% 📃 Sensitive & Masked - 200   12% 📕 Sensitive & Unmasked	1 - 3   0%

- Is profiled: A connector has undergone a profiling job.
- Is sensitive data: Sensitive data identified within a connector's data elements.
- Is masked: A successful masking job has been run on the connector's data.
- Is at risk: Sensitive data within a connector that has not been masked.
  - This is applied to data classified as sensitive (with at least one algorithm assignment), that has not had a successful masking job run. This definition is based on the masking job's perspective.

- Please note that data might be refreshed, potentially mislabeling it as *not at risk* despite changes in the actual data. This discrepancy arises as DCT may not detect that the underlying data has been updated, leading to potential inaccuracies.
- Data elements total: The total count of data elements associated with a connector's data.
- · Records total: The total number of records detected for a connector's data.
- · Sensitive and unmasked: Data elements or records that are sensitive but have not been masked.

# 6.4 Tabular data in DCT

Data Control Tower (DCT) leverages a common reporting framework that brings a polished user experience to the way you work with data tables. This suite of enhancements includes features like:

- Customizable columns
  - Resize columns
  - Show/hide columns dynamically
  - · Rearrange columns for a tailored analysis process
- Column-based filtering
  - · Filter data based on selected fields
  - · Filter menu is automatically populated based on type of data in the column

Tags	≡	Ŧ		$\equiv$	Ŧ	
A	Key			Search		
A	Equals		$\sim$			
	Key			🗸 (Selec	t All)	
A				V BAD_C	CREDENTIALS	6
A	Value			CONN	ECTION_ERR	OR
	Equals		~	MISSI	NG_CREDEN	ΓIALS
A	Value			🔽 ONLIN	IE	
A						
Ac	Ŭ	>	/iew >		APP	LY RESET

- Search bar functionality
  - Search for complex data types and expressions

Search	Search (All)	~	
--------	-----------------	---	--

Any search input or expression from the search bar will be "AND"ed with the filtering from the column menus – meaning search results obtained from the search bar will be combined using a logical "AND" with any filters that have been applied through column menus. Thus, the final set of results shown will only include entries that satisfy both the search criteria and the column filters, resulting in a narrower (or more specific) subset of the data.

# 6.5 Faults, alerts, and actions in DCT

## 6.5.1 Introduction

**A** 

DCT 21.0.0 introduces the ability for DCT to ingest and list/search Continuous Data Engine faults, alerts, and actions (audit logs). These objects are gathered from registered engines via telemetry updates and can be examined by either the DCT API or the UI.

Here are the explanations of what a Fault, Alert, and Action mean in Data Control Tower (DCT):

- Fault: A fault in DCT represents a persistent issue that affects Delphix's behavior and requires manual resolution by the user. For example, a connectivity problem would be considered a fault. While Delphix attempts to resolve faults automatically when the underlying issue is fixed, there are situations where user intervention is necessary to clear the fault. Additionally, faults can be ignored, which prevents Delphix from posting the same fault for the same object in the future.
- Alert: An alert is a notification generated by the engine to inform users of specific events or conditions that have occurred. Unlike faults, alerts do not necessarily indicate a persistent problem that needs immediate attention. Instead, they serve as informational messages to make users aware of certain situations or changes within the system that might need attention but do not necessarily impact the engine's overall behavior.
- Action (Audit Log): Actions refer to recorded events or operations within the engine, typically logged for auditing purposes. These actions are tracked in audit logs and provide a historical record of changes, activities, or operations performed in the engine. Actions are generally used for monitoring compliance and reviewing past events.

## 6.5.2 Prerequisites

To use these new APIs, you need a running DCT instance with at least one registered Continuous Data Engine.

## 6.5.3 API Changes

This feature introduces two new APIs for Continuous Data alerts and actions, and five new APIs for Continuous Data faults.

# 6.5.3.1 Alerts

- GET /virtualization-alerts/history Fetch a list of all Continuous Data alerts.
- POST /virtualization-alerts/history/search Search Continuous Data alerts.

#### 6.5.3.1.1 Example response:

```
{
 "items": [
   {
     "id": "1-ALERT-1",
     "engine_id": "1",
     "alert_timestamp": "2024-08-06T07:09:45.74Z",
     "event": "alert.system.shutdown.management.initialconfig",
     "event_severity": "INFORMATIONAL",
     "event_title": "Initial configuration",
     "event_response": "Initial configuration",
     "event_description": "The management service is going down after initial
configuration.",
      "target_name": "system"
   },
  "response_metadata": {
   "total": 1
 }
```

## 6.5.3.2 Actions

- GET /virtualization-actions/history Fetch a list of all Continuous Data actions.
- POST /virtualization-actions/history/search Search Continuous Data actions.

#### 6.5.3.2.1 Example response:

```
{
"items": [
. {
```

```
"id": "1-ACTION-10210",
      "engine_id": "2",
      "action_type": "USER_LOGIN",
      "title": "USER_LOGIN",
      "details": "Log in as user \"admin\" from IP \"127.0.0.1\".",
      "start_time": "2024-08-16T19:56:59.463Z",
      "end_time": "2024-08-16T19:56:59.463Z",
      "user": "USER-2",
      "user_agent": "Mozilla/5.0 (Macintosh; Intel Mac OS X 10_15_7) AppleWebKit/
537.36 (KHTML, like Gecko) Chrome/125.0.0.0 Safari/537.36",
      "origin_ip": "172.16.124.16",
      "state": "COMPLETED",
      "work_source": "WEBSERVICE",
      "work_source_name": "admin",
      "work_source_principal": "admin"
    }
 ],
  "response_metadata": {
   "total": 1
  }
}
```

## 6.5.3.3 Faults

- GET /virtualization-faults/history Fetch a list of all Continuous Data faults.
- POST /virtualization-faults/history/search Search Continuous Data faults.
- POST /virtualization-faults/resolveOrIgnore Mark a list of faults as resolved or ignored.
- POST /virtualization-faults/{engineId}/resolveAll Resolve all active faults on an engine the user has permissions over as resolved.
- POST /virtualization-faults/{faultId}/resolve Resolve or ignore an individual fault.

## 6.5.3.3.1 Example response:

```
{
    "items": [
        {
            "id": "1-FAULT-1",
            "engine_id": "1",
            "bundle_id": "fault.email.smtprequired",
            "target_name": "system",
            "title": "Password reset requires SMTP to be enabled",
            "description": "Password reset emails cannot be sent if SMTP is disabled or not
configured.",
            "fault_action": "Configure and enable SMTP, or disable the password reset
function.",
```

# 6.5.4 GUI changes

Faults, Events (Alerts), and Audit (Actions) tabs are made available to the UI via the details page of a Continuous Data engine. By default, the faults table only shows **Active** faults. You can choose to show faults with other statuses by configuring the column filter for the **Status** column.

$\langle X \rangle$	DATA CONTROL Hom TOWER	e <u>Data</u> Compliance Insights	Admin			٥	Bootstrap Admin 😫
< Back	Data Engines > jq-d jq-develop d8a34d56-30c9-7143-660	o.dcol2					Actions +
Overvi	ew Environments	Replication dSources N	/DBs Faults Events Audit	Access			
Search			≡ ⊽ Ш			Search (All)	Resolve All 🗸
			Search				
	Severity	Status 👻		Event	Related Object		
	A Warning	Active	(Select All)	Cannot provision a database from a	Untitled/DBOMSRF705B4	Actions	
	A Warning	Active	ACTIVE	Connection to database "VCD_R20"	VPD_R20	Actions	
	A Warning	Active		Connection to database "VCD_R20"	VCDUQN_R20	Actions	
	A Warning	Active		Failed to start database	CDOMLOSRDEE4PDB1_AZ0	Actions	
	A Warning	Active	APPLY RESET	Connection to database "DBOMSRC	DBOMSRCD94D3	Actions	

#### Implementation

These APIs were implemented to mimic the behavior of the corresponding Delphix engine APIs. In the case of actions and alerts, this is a straightforward list, search, and filter functionality. For faults, it is worth understanding the difference between the three APIs specific to resolving or ignoring a given fault:

- ResolveOrIgnore This endpoint accepts a list of fault IDs and a boolean indicating whether to ignore them. If false, all faults in the list will be marked as resolved in DCT and on the Continuous Data Engine. If true, those faults will instead be marked as ignored.
- 2. ResolveAll This endpoint accepts an engine ID and resolves every active fault on that engine (both in DCT and on the engine itself). Permission checks are performed to confirm the active user can operate on the engine before the resolve operation is permitted.
- 3. Resolve This endpoint accepts a single fault ID and a boolean indicating whether to ignore that fault. If false, the fault will be marked resolved in DCT and on the engine. If true, it will instead be marked as ignored.

## 6.5.5 Feature limitations

- DCT will only persist the most recent ten thousand (10,000) alerts/faults per registered engine and the most recent one hundred thousand (100,000) actions.
  - More specifically, DCT will remove the oldest alerts and faults from the database once they
    exceed 10,000 on a given Delphix engine and when the actions exceed 100,000. This was an
    intentional design choice for scalability reasons but might be subject change in the future.
  - If a registered engine has many pre-existing faults, alerts, or actions, it may take some time for them to fully hydrate in the DCT database (e.g. if multiples of 100,000 actions are present).
    - With many actions (hundreds of thousands or millions), full hydration of the DCT database will likely take several hours, though once completed, subsequent updates will happen every 30 seconds.
- Logins to a Continuous Data Engine by the DCT agent (e.g. to fetch a telemetry update) are not present in the **Actions** drop down list.
- If a registered engine has many pre-existing faults, alerts, or actions, it may take some time for them to fully hydrate in the DCT database (e.g. if multiples of 100,000 actions are present).
  - With many actions (hundreds of thousands or millions), full hydration of the DCT database will likely take several hours, though once completed, subsequent updates will happen every 30 seconds.
- While some targets of faults/alerts/actions are linkable in the GUI (e.g. clicking through to view the details page for those objects), this requires an explicit object type mapping in the backend code that has not yet been implemented. This means that only the following object types are linkable at present:
  - dSources
  - VDBs
  - CDBs
  - vCDBs

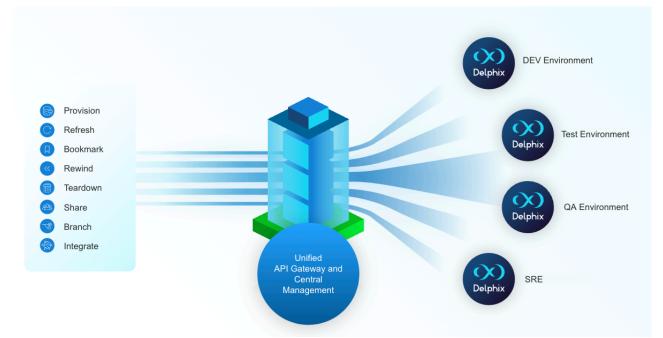
## 6.5.6 Diagnostic data

Any relevant logging specific to the new APIs will be in the virtualization-app container.

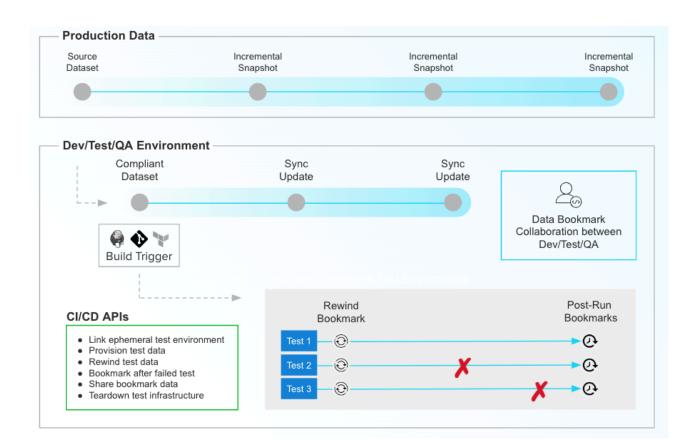
# 7 Continuous Data workflows

# 7.1 DevOps TDM

DCT delivers all of the Continuous Data and developer operations necessary to power DevOps and Test Data Management use-cases. This includes a suite of APIs to drive automation.



Using the above APIs, DCT can seamlessly integrate Delphix data into DevOps pipelines by providing a single point of integration for a broad Delphix deployment.



# 7.2 Developer experience

In addition to automation use cases, DCT provides the APIs and UI to power developer access to Delphix data and common Delphix operations. This section will detail all of the major capabilities that make up this revamped Delphix developer experience.

# 7.3 Managing engines (Continuous Data)

# 7.3.1 Infrastructure

DCT provides a near real-time list of all connected Continuous Data engines and lists them in an aggregate view. From the below screen, Delphix administrators can easily view and manage their engine connections.

CONTRO TOWER	L <u>Data</u> Complia	ance Insights Admin				
dSources	Infrastructure					Connect Engine
VDBs	View all your connected	Delphix engines.				
Bookmarks	Search					Search (All) v
Environments	Status	Name/UUID 个	Туре	Host	Tags	
Infrastructure	Online	Test Engine 42366308-1323-71ff-e258-9c642ad8a2ae	Virtualization 9.0.0.0	uvo1xyellphikiwmhy7.vm.cid.sr	Add Tags >	View >
	Online	amaresh-engine1 564d4aa4-49b1-a455-7873-79833008418a	Unset 10.0.0.0	amaresh-engine1.dcol1.delphix.com	Add Tags >	View >
VDB Config Templates	Online	bhavik-engine ec2242cf-2de9-52fe-b8ac-fa3aff4b7e7c	Virtualization 10.0.0.0	bhavik-engine.dipxdc.co	Add Tags >	View >

Administrators can manage engine connects via the "Connect Engine" button on the top right corner. By clicking this button, the below dialogue will appear, asking for connection details.

DCT will access the engine as a registered user and, as detailed in the **Deployment** section, requires both a username and password as well as admin-level access to the engine.

#### **Connect Engine**

۲	Engine Details	Engine Details
	Authentication	Test Engine
	Security	Hostname uvo1xyellphikiwmhy7.vm.cid.sr
	Tags	Choose Engine Type
	Summary	Virtualization

An option is available to configure DCT so that it automatically creates predefined tags on discovered objects ingested from the engine. This can be done in the **Tags** step of the **Connect Engine** wizard. Checking the box will make VDBs, dSources, and vCDBs automatically get tagged with the name of their Dataset Group on the engine.

Checking the second box will include the engine name as a tag on ingested objects. Finally, checking the last box allows users to set custom tags on ingested objects. Tags will be applied on VDBs, dSources, vCDBs, and Infrastructure Connections.

 $\times$ 

Engine Details	Tags
	Add Engine Tags
Authentication	Enter Tag Key Enter Tag Value + Tag
Security	Add Tags to Discovered Objects
Tags	
Summary	Warning Tags can Grant Access Caution: Auto-tagging can modify object access. Review permissions carefully after auto-tagging objects.
	Include engine dataset group information as a tag on objects with the key "dlpx-dataset-group"
	Include engine name as a tag on objects with the key "dlpx-engine"
	Include custom tags on all objects from this engine
	Enter Tag Key Enter Tag Value + Tag
	Cancel Back Next Sub

All existing and new objects from then on will automatically get the configured tags, which are no different from ordinary tags that can be added to objects. The auto-tagging configuration can later be updated in the Data Engine Details page by going to the **Action** menu and selecting **Auto-tagging Configuration**. This will open up a window with a checkbox to enable or disable auto-tagging.

DATA CONTROL TOWER	Home	Data Complia	nce Insights	Admin				_	ė	•
Data Engines		Auto-tagg	ing Con	figuratio	on				Acti	ons 🔻
784b4d56-977d Overview Environ	-866b-84	Caution:	Tags can Grant . Auto-tagging ca ging objects.		t access. Review p	ermissions o	carefully after		Acti	ons •
	c	Include engine		on objects with	the key "dlpx-engir		llpx-dataset-group"	age g Storage	7.41GB 14.38GB	
		test: test 😵					Remove			
Details		Enter Tag Key	Ent	er Tag Value			+ Tag			🖌 Edit
Hostname Insecure SSL	bn- devel m True					Cancel	Update Settings			
Unsafe Hostname Check Truststore Filename Type Version	None Data Eng 23.0.0.0	ine					-			

Disabling auto-tagging will not remove any of the tags that were previously added. Instead, new ingested objects will not have tags automatically applied. In order to delete these tags, this must first be disabled and the tags will need to be deleted manually on all affected objects.

Since auto-tagging can have an impact on access control, non-admins will require special permissions to configure auto-tagging.

- To configure auto-tagging for pre-defined tags when registering an engine for the first time, the account must have a role with the **Configure pre-defined auto-tagging at registration** permission.
- To update the auto-tagging configuration for pre-defined tags on a pre-registered engine, the account must have the **Configure pre-defined auto-tagging** on the ENGINE object they wish to update.

Configuring custom tags also requires another level of permissions.

- To configure auto-tagging with custom tags when registering an engine for the first time, the account must have a role with the **Configure custom auto-tagging at registration** permission.
- To update the auto-tagging configuration's custom tags on a pre-registered engine, the account must have the **Configure custom auto-tagging** on the ENGINE object they wish to update.

Engines	Preview
Or Configure Custom Auto Tagging	Or Configure Custom Auto Tagging at Registration
Configure Predefined Auto Tagging	Or Configure Predefined Auto Tagging at Registration

### 7.3.2 Infrastructure connection wizard

In the DCT interface, select the **Home** tab on the top navigation bar to see the Infrastructure Connections landing view, which hosts the list of connections. In DCT versions before 9.0.0, these connections were listed under the Environments section of the Data tab. Infrastructure Connections are the DCT equivalent of an environment. The **+ Infrastructure Connections** button will launch the wizard.

L <u>Home</u> Data Compliance	Insights Admin					
						+ Infrastructure Connections
Search						Search (All) V
Name ↑ apna-connection	Hosts IP (Port) unix-stand.dcol1.delphix.com unix-stand.dcol1.delphix.com	DBMS (Version) Unstructured Files Oracle (11.2.0.2.0)	Config Standalone	Engine ID	Tags Add Tags >	View >
orc-tgt.dcol1.delphix.com	orc-tgt.dcol1.delphix.com orc-tgt.dcol1.delphix.com	Unstructured Files Oracle (19.14.0.0.0)	Standalone	1	Add Tags >	View >
win-src-1.dcol1.delphix.com	win-src-1.dcol1.delphix.com win-src-1.dcol1.delphix.com	MSSql (14.0.1000.169) MSSql (15.0.2000.5)	Standalone	1	Add Tags >	View >
win-tgt-1.dcol1.delphix.com	win-tgt-1.dcol1.delphix.com win-tgt-1.dcol1.delphix.com win-tgt-1.dcol1.delphix.com	MSSql (14.0.1000.169) MSSql (15.0.2000.5) Unstructured Files	Standalone	1	Add Tags >	View >
	Infrastructure Connections An overview of your connected infrastructure Search Name ↑ apna-connection orc-tgt.dcol1.delphix.com win-src-1.dcol1.delphix.com	Infrastructure Connections         An overview of your connected infrastructure.         Search         Name ↑       Hosts IP (Porg)         apna-connection       unix-stand.dool1.delphix.com         ore-tgt.dool1.delphix.com       ore-tgt.dool1.delphix.com         win-str-1.dcol1.delphix.com       win-str-1.dcol1.delphix.com         win-tgt-1.dcol1.delphix.com       win-tgt-1.dcol1.delphix.com         win-tgt-1.dcol1.delphix.com       win-tgt-1.dcol1.delphix.com	Infrastructure Connections         An overview of your connected infrastructure.         Search         Name ↑       Hosts IP (Port)         pana-connection       unix-stand.dool1.delphix.com         unix-stand.dool1.delphix.com       Unstructured Files Oracle (11.2.0.2.0)         ore-tgt.dool1.delphix.com       ore-tgt.dool1.delphix.com         win-src-1.dool1.delphix.com       win-src-1.dool1.delphix.com         win-src-1.dool1.delphix.com       WSSq (14.0.100.169)         win-src-1.dool1.delphix.com       WSSq (150.2000.5)         win-tgt-1.dool1.delphix.com       MSSSq (150.2000.5)	Infrastructure Connections         An overview of your connected infrastructure.         Search         Name ↑       Hosts IP (Port)       DBMS (Version)       Corrilg         apna-connection       unix-stand.dcol1.delphix.com       Unstructured Files Oracle (11.2.0.2.0)       Standalone         orc-tgt.dcol1.delphix.com       Oracle (11.2.0.2.0)       Standalone         win-ser-1.dcol1.delphix.com       Unstructured Files Oracle (11.2.0.2.0)       Standalone         win-ser-1.dcol1.delphix.com       Unstructured Files Oracle (11.2.0.0)       Standalone         win-ser-1.dcol1.delphix.com       Win-ser-1.dcol1.delphix.com       MSSql (14.0.100.169) MSSql (15.0.200.5)       Standalone         win-tgt-1.dcol1.delphix.com       Win-ser-1.dcol1.delphix.com       MSSql (15.0.200.5)       Standalone         win-tgt-1.dcol1.delphix.com       MSSql (15.0.200.5)       Standalone	Infrastructure Connections         Infrastructure Connected infrastructure.         Search         Infrastructure Connected infrastructure.         Search         Name ↑       Hosts IP (Port)       DBMS (Version)       Config       Engine ID         apna-connection       unix-stand.dool1.delphix.com       Unstructured Files Oracle (11.2.0.2.0)       Standalone       1         orc-tgt.dool1.delphix.com       Oracle (11.2.0.2.0)       Standalone       1         win-stor.l.dool1.delphix.com       Oracle (11.2.0.2.0)       Standalone       1         win-stor.l.dool1.delphix.com       Win-stor.l.dool1.delphix.com       MSSg (14.0.1000.169)       Standalone       1         win-stor.l.dool1.delphix.com       Win-stor.l.dool1.delphix.com       MSSg (15.0.2000.5)       Standalone       1         win-tgt-1.dool1.delphix.com       MSSg (15.0.2000.5)       Standalone       1	Infrastructure Connections         An overview of your connected infrastructure.         Search         Immer ↑ Hosts IP (Port) DBMS (Version) Config Engine ID Tags apna-connection unix-stand.dcol1.delphix.com Unstructured Files Oracle (11.2.0.2.0) Standalone 1 Add Tags > orc-tgt.dcol1.delphix.com Oracle (11.2.0.2.0) Standalone 1 Add Tags > orc-tgt.dcol1.delphix.com Wris-ser-1.dcol1.delphix.com Wris-ser-1.

The following connections are available:

- UNIX environment
  - Standalone/Cluster
- Windows environment
  - Source/Target
  - Standalone/Cluster

### 7.3.2.1 Infrastructure connection wizard steps

#### 1. Connection Name

Enter the **Connection Name** in the corresponding field and select the **Associated Engine** from the dropdown.

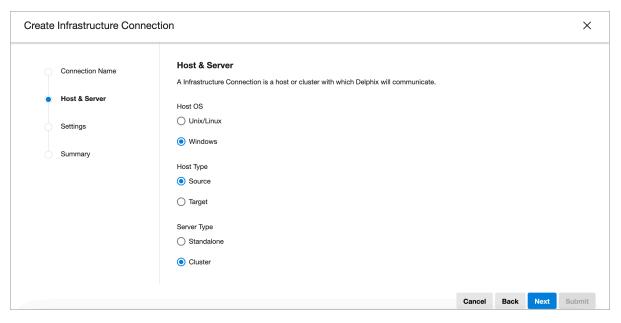
Create	e Infrastructure Conn	nection	×
•	Connection Name	Connection Name Give a meaningful name to your infrastructure connection and select the engine that will be responsible for this infrastructure connection.	
	Host & Server	Connection Name	
	Settings	Please fill in this field. Select Associated Ergine	
	Summary	sj-2903.dcol1	
		Cancel Back	Next Submit

## 2. Host & Server

### Select the Host OS, Server Type, and Host Type (applicable to Windows).

Create Infrastructure Conne	ection	×
Connection Name	Host & Server A Infrastructure Connection is a host or cluster with which Delphix will communicate.	
Host & Server	Host OS	
Settings	Unix/Linux	
Summary	<ul> <li>Windows</li> <li>Server Type</li> <li>Standalone</li> <li>Cluster</li> </ul>	
	Cancel Back Next St	ıbmit

2 Unix



#### 3 Windows

For Windows/Target/Standalone settings, a Delphix Connector download link has been added. Unlike the engine, this link makes an API call to authenticate and download the connector exe file.

#### 3. Settings

This step includes various connection setting options from basic items like the **Host/IP Address** and **SSH Port** to advanced items like **Discover SAP ASE**, **Provide my own JDK**, and **Set NFS**. It includes a **Validate** button to help confirm the environment user and prevents access to the next step if the credentials are not valid.

Create	Infrastructure Connecti	ion				×
		A Connection is a host or cluster with which Delphix will communicate.				
	Host & Server	Toolkit Path				
•	Settings	Java Development Kit				
		Provide my own JDK				
	Summary	Delphix will automatically provide a default JDK unless you elect to provide your own by checking 'Provide my own JDK' Advanced Options				
		Discover SAP ASE				
		Login Settings				
		Username and Password				
		Password Vault				
		○ Kerberos				
		ASE DB Username				
		ASE DB Password				
		Set Network File System Addresses(NFS) Setting NFS addresses is not normally needed. If the host has multiple IP addresses, these can be added for NFS traffic by selecting this option to add additional host addresses.				
		Set Delphix Session Protocol Options(DSP)				
		This option does not need to be selected unless you wish to configure Server/Client authentication for Delphix Session Protocol communication				
		Description				
		ĥ				
		Can	el Ba	ack I	Next	Submit

A wide range of **Login Settings** are available for the OS user and to **Discover SAP ASE** (if applicable), like username/password, username/public key, PasswordVault, or Kerberos.

- a. HashiCorp, CyberArk, and Azure PasswordVaults are supported.
- b. The Kerberos login option only shows up when the user selects a Kerberos enabled engine as the target for environment creation.

Create Inf	rastructure Connect	ion			×
⊖ <b>c</b> c	onnection Name	Settings A Connection is a host or cluster with which Delphix will communicate.			
⊖ Ho	ost & Server	Host/IP Address			
• Se	ettings	SSH Port			
Su	immary	22 Login Settings			
		Username and Password			
		Username and Public Key  Password Vault			
		<ul> <li>Kerberos</li> </ul>			
		OS Username			
		OS Password			
		Validate			
		Toolkit Path			
		Java Development Kit			
			Cancel	Back Nex	xt Submit

4. <u>Java Development Kit</u> (only applicable if selected in Settings) Set the custom JDK path in the corresponding text field.

Create	Infrastructure Connec	ction		×
9	Connection Name	Java Development Kit The current Java Development Kit that is installed:		
0	Host & Server	Jordani JDK Java Development Kit (JDK) Path path/to/jdjk	J	
0	Settings	Provide the full (absolute) path to the root of the JDK.	J	
۰	Java Development Kit			
0	NFS Addresses			
0	DSP Options			
0	Summary			
			Cancel Back	Next Submit

## 5. **<u>NFS</u>** (only applicable if selected in **Settings**)

Set NFS addresses in the corresponding text field (comma separated).

Create Infrastructure Conn	ection		×
Connection Name	NFS Addresses Set Network File System (NFS) Addresses		
Host & Server	NFS Addresses host1, host2.com, 1.12.21.32		
Settings			
Java Development Kit     NFS Addresses			
DSP Options			
Summary			
		Cancel Back	Next Submit

6. **DSP** (only applicable if selected in **Settings**) Set DSP configurations in this step.

ate Infrastructure Conne	ection	
Connection Name	DSP Options These fields have no effect unless client and server authorization for remote connections is enabled. These can be enabled in the Network Security section of the associated engine's Setup application	
Host & Server	dashboard.	
Settings	DBP Keybox PMin DSP config1	
Java Development Kit	05P KepStore Password	
NFS Addresses	DBP Keydoor Alaa DSP config2	
DSP Options	DSP footStore Path	
Summary	DSP config3	
	DSP hostStore Peaswood	
	Cancel Back Next	t Su

#### 7. Summary

Shows a comprehensive summary of the selected options in the previous configuration steps. Shows the type of login being used for both the OS user and SAP ASE (if applicable).

ate Infrastructure Conn	ection					
Connection Name	Summary					
	Review the configuration for this Infrastructure Conne	ction				
Host & Server	Host	User				
	Host OS Unix/Linux	Login Type Password authentication used				
Settings	Server Type Standalone	OS Username sybase				
Java Development Kit	Connection Name My IC					
NFS Addresses	Associated Engine sj-2903.dcol1					
DSP Options	Host/IP Address unix-stand.dcol1.delphix.com					
• Summary	NFS Addresses host1, host2.com, 1.12.21.32					
	SSH Port 22					
	Toolkit Path /work					
	<b>Java Development Kit (JDK) Path</b> path/to/jdk					
	DSP KeyStore Path DSP config1					
	DSP KeyStore Alias DSP config2					
	DSP TrustStore Path DSP config3					
	Discover SAP ASE					
			Cancel	Back	Next	Su

# 7.4 Self-Service vs. DCT developer experience

Data Control Tower now provides a central experience for developers. Whether a developer prefers to leverage Delphix via API, integration, or UI, DCT delivers the ability to quickly access data from any connected Delphix engine, and the common capabilities to drive application development and testing.

Previously, Delphix offered a local addon application called Self-Service (or Jet Stream) that was attached to applicable data engines. Self-Service provided an interface to access pre-provisioned datasets encapsulated in "Self-Service containers", which would be made available by admin configuration.

Data Control Tower has taken the most common operations and use-cases, and has made this experience accessible to developers via API, integration, and UI. This article will describe the key use-case and operational overlap, as well as the differences between the local engine Self-Service experience and DCT's developer experience.

### 7.4.1 Key similarities

#### 1. Developer access to Delphix Data

The DCT developer experience is geared toward driving access to data, with all of the same timebased operations to enable application development and testing. Operations (accessible via the API, integration, or UI) include refresh, rewind, start/stop, enable/disable, bookmark, bookmark share, and timeflow visibility/access.

#### 2. Developer timeflow history

A common UI benefit in Self-Service is the ability to visualize past timeflows (see Timeline history (see page 288) for more detail), which acts like a testing record. Every time a developer runs a test and rewinds/refreshes, that past test results are stored in Delphix as a timeflow. DCT has both API and UI instrumentation to make the visualization and curation of timeflows incredibly simple.

#### 3. Data-as-Code

Developers can use DCT bookmarks to reference a point in time on a VDB (or group of VDBs) with a developer-set retention period and human-readable name. This is valuable for development teams as they evolve application code. Whenever a code change necessitates a new database schema, a developer can bookmark a VDB that is formatted to work with that particular code branch. This empowers development teams to always have access to a viable test data set for any and code branches of an application.

### 7.4.2 Key differences

#### 1. DCT delivers a central interface powered by its converged architecture

This means that developers have a single location to log into in order to access and manipulate their virtual data sets.

#### 2. User experience

The DCT developer experience UI has completely been reworked to make developer access to Delphix data easy and intuitive. This experience shows itself in three UI tabs, **Active Timeline**, **Timeline History**, and **Bookmarks**, that are located in each VDB's detail menu. This experience is meant to be used by all Delphix users (admins and developers, especially) and will be tailored to the individual based on the DCT Access Control system.

#### 3. No template/container model

Previously, engine administrators needed to create templates encapsulating one or more related VDBs and provision new VDBs into a developer-accessible container. This model required manual administration that created bottlenecks for data access, which was especially prohibitive for

automation use-cases. The benefit of this model was two-fold: **first**, containers represented a miniature sandbox for developers (using a Self-Service user role) and **second**, bulk operations could be performed on all container-grouped VDBs while maintaining referential synchronicity, a valuable attribute for integration testing.

### 4. DCT Access Control replaces the developer sandbox enabled by Self-Service containers Developers simply log into DCT and can view and act upon data that they are entitled to access with operations tightly bounded by their defined role. DCT's Access Control system has the ability to automate both user membership of access groups and entitlement access via attribute-defined scoped roles. In addition, roles can be customized in DCT such that granular permissions can be extended and restricted down to both access group and user levels.

#### DCT VDB Groups replace the Self-Service container grouping mechanism Currently only available via API, VDB groups enable the association of one or more VDBs for bulk operations while maintaining referential synchronicity.

#### 6. Time operations consolidation

The developer experience UI consolidates the many time-based operations across Continuous Data and Self-Service (e.g. refresh, rewind, rollback, restore, reset, etc.) into a single operation; **refresh**. From the DCT UI, clicking refresh will take users to a contextualized screen that simplifies time operations by focusing on what timeline (and what time) the user would like to align to (parent, self, or relative).

#### 7. No "branching"

Branching in Self-Service introduced the notion of task-specific timelines, each with its own associated sets of timeflows. This was a concept that was heavily tied to the "template/container" model and is obviated by the DCT Access Control system that can enable gated provisioning access to a developer. If a new timeline is needed for a separate task, you can provision a new VDB.

DCT has a Delphix-supported integration with ServiceNow, which is commonly used as a developer resource-request tool. Users can build custom developer-centric workflows with any operation currently instrumented through the DCT API layer.

# 7.5 Self-Service/Jet Stream migration to DCT

Self-Service is a feature that helps manage data within environments autonomously, while Jet Stream aimed to provide more granular control over the data in those environments. These features are now utilized through Data Control Tower, adding a vast array of additional enhancements to provide full control and offer in-depth insight for your data.

# 7.5.1 Bookmark and permission import

A method is available to import bookmarks from a Self-Service/Jet Stream engine into DCT. The imported bookmarks from the engine are tagged with the bookmark\_source "ENGINE", since they are initially managed by the engine. Consequently, any modifications made to these bookmarks on the engine will also be reflected in DCT.

To transition these engine-managed bookmarks into DCT-managed bookmarks, an API is provided that handles the process. It converts the engine-managed bookmarks into DCT-managed and removes both the bookmarks and their parent on the engine. When the API triggers the conversion of engine-managed bookmarks to DCT-managed, a background job is initiated in DCT. This job retrieves all bookmarks and their respective containers/templates from Self-Service/Jet Stream.

If the job runs for a container on Self-Service, it may have assigned owners. These owners must be brought into DCT. The list of owners is available in the container and the details are retrievable from the engine. Subsequently, the job imports all valid owners (those with an email address) into DCT.

If there is not an account in DCT with the same email, a new account is created; otherwise, the creation process is skipped. In either scenario, the container-linked VDB IDs and its template data-source IDs are added to these accounts with predefined roles. Upon job completion, the accounts in DCT, whether created or updated, will have the ability to perform the same operations on bookmarks or their datasets as in self-service.

The two new roles introduced are as follows:

- self-service-data-operator-system-role (for adding IDs of container data sources)
- self-service-data-viewer-system-role (for adding IDs of template data sources)

The process to import bookmarks runs automatically every four (4) hours, but can also be initiated manually.

# 7.6 Creating and managing bookmarks

# 7.6.1 Create a Bookmark

Bookmarks are a critical developer tool that enables the creation of a namable time reference to a snapshot of a VDB or VDB group. Bookmarks for single VDBs can be created from the DCT UI by selecting a VDB and expanding into its detailed view. From the **Active Timeline** view, users can select the ellipsis in the top right corner and "Create Bookmark".

CON TOW	TROL Data	Compliance Insight	s Admin		θ
	S_DEV				
Overview	Active Timeflow	Timeflow History	Bookmarks	Access	Refresh
		-			Enable
<b>Today</b> Mar 27, 2023					Disable
					Start
Snapshot 11:22 AM					Stop
2 months ago					Delete
✓ Jan 20, 2023					Create Bookmark

Selecting the "Create Bookmark" button will open a window that enables bookmark naming, setting the custom retention period for that bookmark, and assigning any relevant tags. Creating bookmarks this way will initiate a **new** snapshot operation that will then be associated with that bookmark.

Bookmarks relating to a specific VDB can be found under the bookmarks tab in a VDBs details page. This provides a curated list of actionable snapshots that represent anything from a relevant test result to a transformed set of schema that can be associated with a specific branch of code.

Ç	<b>x)</b>	DATA CONTROL TOWER	Data	Compliance Insi	ghts Admin			θ
< 1	/DBs	VDB AppFS_DEV ID: 3-APPDATA_CONTAINE	R-276					
	Overvi	ew Active Ti	meflow	Timeflow History	Bookmarks	Access		
1	Bookmark			Creation Da	te	Tags	Actions	
1	Finance-App	p-1.0.3.2		Mar 27, 202	3 11:21 AM	View Tags (1) >	1	

# 7.6.1.1 Create a bookmark from an existing snapshot

Starting in version 7.0, the UI has an option to create bookmarks from existing snapshots.

On the VDB detail page, under the **Active Timeline** tab for each snapshot, a **Create Bookmark** action is available. This opens a dialogue that shows a list of inputs for the user to select from, to create a bookmark.

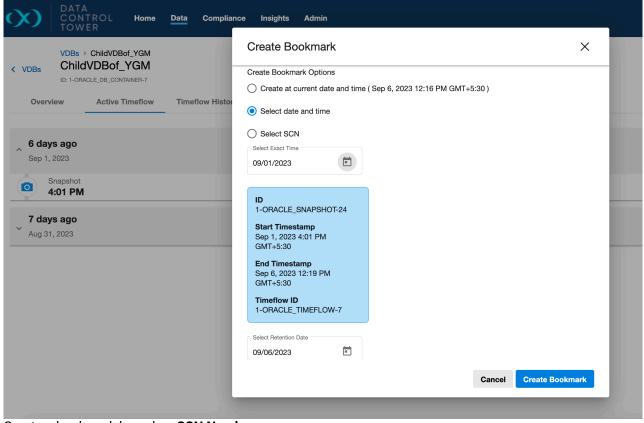
Once the user clicks **Create Bookmark** in the dialogue, the bookmark will be created for that particular snapshot (if all the mandatory fields are completed), else errors will be shown.

DATA CONTROL <u>Data</u> Compliance Insights Admin TOWER	(
VDB JK-VDB-1	
ID: 5-MSSQL_DB_CONTAINER-10	
Overview         Active Timeline         Timeline History         Bookmarks         Access           Mar 22, 2023         Mar 22, 2023	2
4 days ago Mar 21, 2023	1
5 days ago Mar 20, 2023	1
6 days ago Mar 19, 2023	1
Snapshot 4:01 PM	
7 days ago	C Refresh
Mar 18, 2023 8 days ago	Create Bookmark
Mar 17, 2023	\$a

Create a bookmark at the current data and time.

DATA CONTROL Home Data Compliance Insights Admin TOWER	Θ
VDBs > ChildVDBof_YGM ChildVDBof_YGM	
VDBs CITIEDVDB0_YGM     ID: 1-ORACLE_DB_CONTAINER-7     Overview Active Timeflow Timeflow Histor	Actions *
Create Bookmark Option	š
6 days ago	e and time ( Sep 6, 2023 12:16 PM GMT+5:30 )
Sep 1, 2023 O Select date and time	
Snapshot Select SCN	Actions :
7 days ago	•
E Keep until manually re	moved (not recommended)
	ong-lasting bookmarks may result in increased storage usage. all snapshots dependent on this bookmark will be retained, irrespective of
✓ Inherit Tags from Pare	nt VDB
	Cancel Create Bookmark

Create a bookmark based on the **selected** date and time.



Create a bookmark based on SCN Number.

DATA CONTROL Home Data Compli TOWER	iance Insights Admin
VDBs → ChildVDBof_YGM         < VDBs	○ Select date and time
6 days ago Sep 1, 2023 Snapshot 4:01 PM	Select SCN SCN Number 3471175
7 days ago <sup>*</sup> Aug 31, 2023	1-ORACLE_SNAPSHOT-24 Start Location 3471175 End Location 3888678 Timeflow ID 1-ORACLE_TIMEFLOW-7
	Select Retention Date 09/06/2023  Keep until manually removed (not recommended) Cancel Create Bookmark

### 7.6.2 Bookmark API Documentation

Some advanced bookmark operations are only available via API at present, formal documentation can be found via DCT's swagger docs or the Developer resources section. This portion of the bookmarks documentation will discuss examples of advanced use-cases.

### 7.6.3 Create a Bookmark at the current time for multiple VDBs

DCT (version 6.0 and above) can create bookmarks from existing snapshots. This is particularly useful for users looking to migrate Self-Service bookmarks to DCT or any developer looking to retroactively create a bookmark reference.

In cases such as integration testing, bundling multiple VDBs together to represent a complete set of data that a complex application would run on is helpful. This API example shows how a single bookmark reference can be created off of multiple VDBs, to provide a provision point for new testing sets or the creation of a VDB Group that can be used to maintain referential synchronicity from that bookmark point.

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/bookmarks' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
```

```
-d '{
    "name": "MyBookmark1",
    "vdb_ids": [
        "1-ORACLE_DB_CONTAINER-2",
        "2-ORACLE_DB_CONTAINER-2"
]
}'
```

Ξ

These API calls will return a DCT job to track the creation process. This job ID can then be used to poll the status via the jobs API. Example response:

```
{
  "bookmark": {
    "id": "9e8c7223f1af4694a19ac2c2f7696eda",
    "name": "MyBookmark1",
    "creation_date": "2023-03-27T20:56:13.916857Z",
    "vdb_ids": [
      "1-ORACLE_DB_CONTAINER-2",
      "2-ORACLE_DB_CONTAINER-2"
    ],
    "retention": 30,
    "expiration": "2023-04-26"
  },
  "job": {
    "id": "8fe825f5635d45299915c3cb88a17623",
    "status": "PENDING",
    "type": "BOOKMARK_CREATE",
    "target_id": "9e8c7223f1af4694a19ac2c2f7696eda",
    "start_time": "2023-03-27T20:56:14.363549Z"
  }
}
```

### 7.6.4 Creating a bookmark from a chosen timepoint

Now bookmarks can be created at a chosen snapshot timepoint using new properties in the request payload. Some properties are mutually exclusive, so be sure to use a valid request payload.

Here are some examples of a valid request payload:

```
{
    "name": "my-bookmark-123",
    "vdb_ids": [
        "vdb-123"
],
    "location": "112233",
```

```
"expiration": "2021-07-04",
"retain_forever": false,
"tags": [
    {
        "key": "key-1",
        "value": "value-1"
    },
    {
        "key": "value-1"
    },
    {
        "key": "key-2",
        "value": "value-2"
    }
],
"make_current_account_owner": true
}
```

```
{
 "name": "my-bookmark-123",
  "timeflow_ids": [
   "timeflow-1"
 ],
 "location": "112233",
 "expiration": "2021-07-04",
  "retain_forever": false,
  "tags": [
    {
     "key": "key-1",
      "value": "value-1"
   },
   {
     "key": "key-2",
     "value": "value-2"
   }
 ],
  "make_current_account_owner": true
}
```

```
{
    "name": "my-bookmark-123",
    "timeflow_ids": [
        "timeflow-1"
    ],
    "timestamp": "2021-05-01T08:51:34.148000+00:00",
    "expiration": "2021-07-04",
    "retain_forever": false,
    "tags": [
        {
            "key": "key-1",
            "value": "value-1"
        },
    }
}
```

Properties

- timestamp
- location
- timestamp\_in\_database\_timezone
- timeflow\_ids

#### Rules

• timestamp , location and timestamp\_in\_database\_timezone are mutually exclusive.

• If any of the properties from timestamp , location and

timestamp\_in\_database\_timezone are provided then:

- At least one property for vdb\_ids or timeflow\_ids must be provided.
- The snapshot\_ids property is not allowed to be set.

# 7.7 VDB operations

The developer experience will continue to see investment and additional capabilities over the next few releases.

The VDB operations UI serves as an actionable command center for admins and developers. With this UI, users can migrate from using the local engine UI to leveraging DCT to do their daily VDB-related work. This encompasses both continuous data as well as any developers leveraging Delphix Self Service.

The core benefit of this UI experience is the breadth of access coupled with DCT's access control system. Using both together, a user can access and act upon any data on any connected engine within the boundaries of the entitlement and permissions set by the admin-driven access control system.

CONTROL TOWER	Home Da	ata Compliance Insights Admin								٥
Sources	VDBs								Provision	VDB
DBs	An overview of V	/DBs across your Delphix infrastructure.								
ookmarks	Search								Search (All)	~
Data Engines	Status	Name ↑	Туре	Engine		Compliance	Last Refresh	Tags		
DB Config Templates	UNKNOWN	ChildVDB	Oracle	SJ		Not Masked	Sep 19, 2023 1:04 PM GMT+5:30	Add Tags >	View	>
	UNKNOWN	DBOMSR91F858dSource2_VLN	Oracle		Engine	Not Masked		Add Tags >	View	>
	UNKNOWN	EmptyVDB_90NC2M95	Unstructured Files		Engine	Not Masked		Add Tags >	View	>
	UNKNOWN	JK_CDOMSHSR364EPDB31109_ZKD	Oracle	SJ		Not Masked		Add Tags >	View	>
	UNKNOWN	VAppdata dSource_CEdrbQhH	Second_Plugin	Dj		Not Masked		Add Tags >	View	>
	UNKNOWN	VAppdata dSource_GpqlRueN	Second_Plugin	Dj		Not Masked		Add Tags >	View	>
	UNKNOWN	VAppdata dSource_IDnCsFtt	Second_Plugin	Dj		Not Masked		Add Tags >	View	

To access the VDB operations UI, users only need to log into DCT and select the detailed view of any particular VDB.



From there, users can perform common operations such as refresh, rewind, and bookmark using the Active Timeline tab. Developers have additional functionality with the Timeline History tab that exposes non-active timelines (also known as timeflows).

# 7.7.1 VDB provisioning wizard

Users can provision VDBs from the DCT UI using the Provision VDB button located under the action button on a VDB details page.

# 7.7.1.1 Supported database platforms

- Oracle Multi Instance (Single Tenant)
- Oracle Multi Instance (Multi Tenant) with linked vCDB
  - TDE is supported for Oracle versions greater than or equal to 12.2.
  - Only vCDBs with database versions greater than or equal to 12.1.0.2 can be linked.
  - Auto VDB restart is supported for Oracle versions greater than or equal to 12.1.0.2.
- Oracle Single Instance (Multi Tenant) with linked vCDB
  - TDE is supported for Oracle versions greater than or equal to 12.2.
  - Only vCDBs with database versions greater than or equal to 12.1.0.2 can be linked.
  - Auto VDB restart is supported for Oracle versions greater than or equal to 12.1.0.2.
- MSSQL Multi Instance
  - Drive letters are not supported and are set to default values.
- · SAP ASE
- AppData
  - AppData is used for connecting with other databases like Postgres, SAP HANA, etc. by uploading the plugin. Refer to the Provisioning a PostgreSQL VDB<sup>123</sup> page for more details.
- vFiles
  - Refer to the Unstructured files and app data<sup>124</sup> page for more details.

Extending the developer experience capabilities in DCT, users can now provision MSSQL single instance databases or Oracle single instance multi-tenant databases with linked CDB data platforms from the user interface, using an intuitive wizard workflow. Located on the VDB page is a **Provision VDB** button that opens the provisioning wizard. (Note: non admin users will only be able to see provisionable sources (dSources and/or VDBs), environments, and engines to which they are authorized to see and act upon).

### 7.7.1.2 Step examples

The provisioning wizard will walk through the following steps:

• Source: search and select either a dSource or VDB to provision from.

<sup>123</sup> https://ecosystem.delphix.com/docs/latest/provisioning-virtual-databases

<sup>124</sup> https://cd.delphix.com/docs/latest/unstructured-files-and-app-data

$\leftrightarrow$ $\rightarrow$ C (i) localhost:4200/data/vdbs			🖞 🏠 🗯 🔳 K 🗄
Provision VDB			×
Source     Provision Point     Target Environment     Target Configuration     Policies     Summary	Source Select an available Source or VDB from which to provision to dSources VDBs Search Biscuit CDOMLOSR1E0FPDB1 CDOMLOSRCA3BPDB1 DBOMSRB331B3 DBOMSRD914EA SourceDB4-69963 db_rhel83_160_1 tems per page: 25 * 1-7 or 7	b your VDB. CDOMLOSR1E0FPDB1 Details Name CDOMLOSR1E0FPDB1 Version Oracle 18.3.0.0.0 Engine KM's Engine Group Oracle SI MT Environment Oracle MT 18	
		Cancel	Back Next Submit

- Provision Point: three options for a provision point, similar to a refresh point.
  - A selected snapshot
  - A specific timestamp (closest snapshot to the timestamp)
  - A location ID/number (closest snapshot to the location number)

← → C (C	localhost:4200/data/vdbs		≙ ☆	h 🗆	<b>K</b> :
Provision	NDB				×
	iource rovision Point	Provision Point The data from the parent will be copied to the target VDB. Selected dSource: CDOMLOSRIE0FPDB1			
	arget Environment arget Configuration	Select Provision Point Select Exact Time (Slower) SCN Number Refresh (Slower)			
	olicies uummary	default 2 days ago Jul 25, 2023	1		
		Snapshot 4:01 PM 3 days ago Jul 24, 2023	1		
		<b>4 days ago</b> Jul 23, 2023	1		
		5 days ago Jul 22, 2023 Cancel Ba	1 ck Next	Sub	mit

• **Target Environment**: shows compatible environments with compatible repositories, and can optionally provide privileged credentials.

$\leftrightarrow$ $\rightarrow$ G	Iocalhost:4200/data/vdbs			🖞 🌣 🖨 🗖	1 🙁 E
Provisio	on VDB				×
	Source Provision Point Target Environment	Target Environment The target environment is the location where your VDB w Selected dSource: CDOMLOSR1E0FPDB1	III be provisioned. Select a target environment from the list under "Environment" and complete the Home and User fields.		
	Target Configuration	Oracle MT 18	User oracle	•	
	Policies		/ud1/app/oracle/product/18.0.0.0/dbhome_1	•	
	Summary		Container Database CDBCDOMLOSR11MW_XEZ	¥	
			Provide Privileged Credentials     Cancel Bac	ck Next Sut	ıbmit

- Target Configuration: should be prefilled with default configurations. One thing to note here are the tags which are additive when "Include Tags from Parent" is checked, and you wouldn't immediately see the tags from the parent in the editor. Tags are added when the Include Tags from Parent box is checked, you would not immediately see them from the parent in the editor.
  - Users can also select the engine group and register listeners by expanding the advanced section below. In DCT, it is recommended to use tags instead of engine groups.

	Set the various target configuration options for the newly	provisioned VDB.		
Provision Point	Mount Base *	Include Tags from F	Parent dSource	
Target Environment	/mnt/provision			
Target Configuration	Oracle Pluggable Database Name * CDOMLOSR1E0FPDB1_HE8	Enter Tag Key	Enter Tag Value	+ Tag
Policies	VPDB Name* CDOMLOSR1E0FPDB1_HE8			
Summary	Oracle Virtual Container Database Name * CDBCDOMLOSR1HE8_ECI			
	vCDB Name* CDBC_ECI			
	Oracle Virtual Container Database SiD * CDBCDOMLOECI			
	Oracle Virtual Container Database Unique Name * CDBCDOMLOSR1HE8_ECI			
	Transparent Data Encryption (TDE)			

• The Target Configuration screen will present different options depending on the chosen **Source**.

### • vCDB Configure Parameters: Applicable to Oracle Single Instance (Multi Tenant) with linked vCDB.

sion VDB			
Source	vCDB Configure Parameters		
Provision Point	Default	* Save as New Template	
Target Environment	Table Text		
Target Configuration	Name	Value	î +
• VCDB Configure Parameters	max_pdbs	4098	
Policies	memory_target	1342177280	
	log_archive_format	¹%t_%s_%r.dbf'	
Summary	nls_territory	'AMERICA'	
	compatible	'18.0.0'	
	processes	300	
	nls_language	'AMERICAN'	
		Ca	ncel Back Next St

C i localhost:4200/data/vdbs					₫ \$	* 🗆 🤇
ovision VDB						2
Source	Policies Select the desired snapshot policy for the new VDB	3.				
Provision Point	Source CDOMLOSR1E0FPDB1		Target Environment Oracle MT 18			
Target Environment						
Target Configuration	Default Snapshot	None:SnapshotPolicy				
Policies	Snapshots will be taken: At 03:30 AM, only on Sunday (US/Pacific) At 03:30 AM, only on Monday (US/Pacific)	Nothing scheduled for this policy.				
Summary	View all 7 schedules					
				Cancel Ba	ck Next	Subm
• Masking:						
vision VDB						

	Source	Masking Select 'Mask this VDB' to mask your data during pro	visioning.			
	Provision Point	Source: DBOMSRD21991	Target: Oracle			
	Target Environment	Mask this VDB	0.000			
	Target Configuration	Note: You should define a Configure C	lone script in the Hooks step to mask the dataset. The selection of			
	Policies	script to do so or not.	the data to be marked as masked, whether you have defined a edataset, the data will not be masked unless there is a masking			
•	Masking	job associated with the source dataset				
	Hooks					
	Summary					
				Canaal		

- Hooks: Delphix users now have the ability to add custom hooks to a VDB at the time of provision (as part of the provision wizard UI) and update them under a VDB detail page, so that they will execute during refresh operations. A Hooks section in the Summary page shows a list of all the hooks configured (if any). Hooks can be modified in the details page after creation.
  - In DCT 18.0.0 and above, users can reorder hooks for different operations at various hook points from within the VDB provisioning wizard UI. In addition, users can now add, edit, delete, and reorder hooks on the provisioned VDB via the VDB details page under the Hooks tab. Either cancel or confirm the reordering of the hooks using the corresponding buttons in the UI.

		Select what hooks to run during various V	DB hook points.	
	Provision Point	Source: DBOMSR3A85E9	Target: Oracle Source	
	Target Environment	Hook Points	Hooks	
	Target Configuration	Select hook point to add hooks on the right.	Hooks run in order from top to bottom, drag hook cards to re-order.	
	Policies		Hook1 🔋 Remove 🖌 Edi	ıt
	Masking	Configure Clone >	Туре:	
		Pre Refresh	Shell	
•	Hooks	Post Refresh	Script echo	
	Summary	Pre Self-Refresh (Rollback)		
	,	Post Self-Refresh (Rollback)	Hook2 BRemove Z Ed	
		Pre Snapshot		
		Post Snapshot	Type: Shell	
		Pre Start	Script echo	
		Post Start	eulio	

• **Summary**: review the selections that have been made. In 10.0 and above, a hooks header has been added to the Summary page that shows a list of all the hooks configured for Hook Operations while provisioning a VDB (if this was configured).

$\leftarrow \  \   \rightarrow \  \   G$	localhost:4200/data/vdbs			🖞 🌣 🛊 🗖 🔇 i
Provisi	ion VDB			×
0	Source	Summary Review the configuration profile for this VDB		
0	Provision Point	Source	Target	
0	Target Environment	Source dSource/VDB CDOMLOSR1E0FPDB1_HE8	Environment Oracle MT 18	
0	Target Configuration		Installation Home /u01/app/oracle/product/18.0.0.0/dbhome_1	
0	Policies		Mount Base /mnt/provision	
•	Summary		vPDB Name CDOMLOSR1E0FPDB1_HE8	
			Oracle Pluggable Database Name CDOMLOSR1E0FPDB1_HE8	
			vCDB Name CDBCDOMLOSR1HE8_ECI	
			Oracle Virtual Container Database Name CDBC_ECI	
			Oracle Virtual Container Database SID CDBCDOMLOECI	
			Oracle Virtual Container Database Unique Name CDBCDOMLOSR1HE8_ECI	
			Transparent Data Encryption (TDE) Off	
			VDB Tags No tags added	
			Cancel Bac	k Next Submit
			Cancel Bac	K INEXT Submit

## 7.7.1.3 Limitations

TDE and Auto VDB restart are only supported for Oracle version 12.2 or higher.

# 7.7.2 VDB refresh wizard

### 7.7.2.1 Overview

The VDB refresh wizard in the Data Control Tower (DCT) UI offers important engine refresh operations including:

- Self-refresh by snapshot, timestamp, or location: Refreshes a VDB back to a point in its own history.
- **Refresh to parent by snapshot, timestamp, or location:** Data is pulled from the VDB provision parent (the dSource or VDB from which the VDB was provisioned).
- **Refresh to relative by snapshot, timestamp, or location:** Allows selection of data from either the origin dSource of the VDB or any VDB sharing the same origin dSource.
- Refresh to bookmark snapshot: Refreshes a VDB to a compatible bookmarked snapshot.

To perform a refresh from a dSource or VDB, the account must have the REFRESH permission on both the VDB being refreshed and the dSource (or VDB) from which the data is being refreshed.

### 7.7.2.1.1 New changes in DCT version 19.0.0

#### 7.7.2.1.1.1 Timeline selection in VDB refresh wizard

The VDB refresh wizard now shows the timeline to select the snapshot to refresh from. This timeline presents various refresh sources including Parent, Self, and Relative.

- **Bookmarks availability:** Bookmarks are now available in all mentioned refresh sources in the refresh wizard.
- Action button for bookmarks: The action button for the bookmarks will not be shown in the VDB refresh wizard on the timeline.

### 7.7.2.2 User interface

#### 7.7.2.2.1 Initiating Self-Refresh by Snapshot

The Self-Refresh by Snapshot operation can be initiated as an action from the VDB's own active Timeline or Timeline History view using the action menu for snapshots.

A rollback could be required depending on the hook scripts, as a refresh can sometimes become a rollback.

#### 7.7.2.2.2 Performing all refresh types

All three refresh types (Self, Parent, Relative) can be performed by opening the refresh wizard on the VDB Details page. The steps are as follows:

- 1. Select Refresh Source:
  - Self-Refresh: Select a timeflow from the VDB's own history, then a snapshot within the selected timeflow.
  - **Parent Refresh:** Select a timeflow from the VDB's provision parent's history, then a snapshot within the selected timeflow.
  - Relative Refresh: Select a relative dSource or VDB, then a timeflow, then a snapshot.
  - Refresh to Bookmark: Select a compatible bookmark from the VDB.

You can also refresh from a particular bookmark under the VDB details page, via the **Bookmarks** tab. Choose a bookmark from the list as the one to refresh from, then click the Actions menu and select Refresh to Bookmark. Source and Expiration Date columns are now populated in the Bookmarks list.

Refresh "VVdb_MIK"						×
Select Refresh Source     Select Bookmark     Summary	Select Refresh Source Select the source of the data refresh. Parent Set the data state of this VDB to any available point from the parent.	Self Set the data state of this VDB to any available point on this VDB.	Relative Set the data state of this VDB to any available point from any relative VDB.		<b>rk</b> lata state of this patible bookmari	
				Cancel	Back	ext Submit

#### 2. Review and Submit:

 Review the Summary page once configurations are complete, then click Submit. Refreshing happens asynchronously and takes various amounts of time. The DCT UI does not currently show asynchronous job progress or errors; please refer to the engine UI for this function.

# 7.7.3 VDB Groups

### 7.7.3.1 Overview

VDB Groups introduce a new functionality that allows users to organize and manage VDBs in a comprehensive listing page, accessible under the **Data** tab in DCT version 20.0.0 and above.

CONTROL TOWER	Home Data Compliance	Insights Admin			豊 Bootstrap Admin f1e90de8-55ec-	4659-96bb-351c0f278a68
Data Management $\vee$	VDB Groups					+ VDB Group
Bookmarks		across your Delphix infrastructu	-			
dSources	An overview of VDB Groups	across your Deiphix Infrastructu	re.			
VDBs	Search					Search (All)
VDB Groups						
VDB Config Templates	Name	Status	Platform	Last Refresh	Tags	
Policies >	Group 1	G Running	Mixed		Add Tags >	View >
Data Infrastructure >	Group 2	😔 Running	Mixed		Add Tags >	View >
					1 to 2 of 2	< Page 1 of 1 >

### 7.7.3.2 Latest changes

Please expand the list below to see the full details of all changes to VDB Groups, mostly highlighting new features and capabilities that have been added.

#### Version changes

- DCT 21.0.0
  - VDB Group configuration management (add/remove VDBs and manage the order of execution)

DCT can add/remove VDBs to/from the group and arrange the order from which bulk operations (like refresh) will be applied. This is particularly crucial for data sources like Oracle EBS, where application files and the underlying Oracle database need to be refreshed in a specific order.

#### VDB Group bookmark creation support

DCT can create a bookmark across one or more VDBs contained in the group, to provide a human-readable reference point for that specific point in time.

#### • VDB Group refresh support

DCT can refresh one or more VDBs contained in the group based on a specific bookmark reference or to the latest snapshot on each VDBs' respective parent (VDB or dSource).

#### • DCT 22.0.0 and DCT 23.0.0

VDB Group start/stop, disable/enable, and lock/unlock support

With these features, users can perform key operations on VDB groups, such as starting, stopping, enabling, disabling, locking, and unlocking VDBs. An option has now been added to refresh VDB Groups immediately after creation. Using this option will refresh each VDB in a VDB Group to latest snapshot of its parent. The functionality allows for batch processing, where multiple VDBs within a group can be managed simultaneously, ensuring smooth and efficient operations.

• DCT 24.0.0

#### VDB Group refresh from the latest point-in-time

This feature introduces the option to refresh from the Latest Point in Time for VDB Groups, in addition to the default Latest Snapshot option. Users can review the latest point-in-time details for each VDB on the Summary page.

• DCT 2025.1.0

#### VDB Group refresh to exact date/time (from self)

In the Refresh Point tab, there is now an option to refresh from Exact Timestamp (slower), in addition to Latest Snapshot (selected by default) and Latest Point in Time.

#### 7.7.3.3 Creating a VDB Group

The creation of a VDB Group is facilitated through a three-step wizard:

#### 1. Configuration

• Add identifying details for the VDB group, including Name and Tags.

Configuration	Configuration				
		name and set initial configuration			
Provision Point	VDB Group Name Enter a name for this	VDD 0			
	Enter a name for this	VDB Group			
Operation Order for VDBs	Refresh VDBs to Keep i	n Sync?			
		from their parent's latest snapshot w	hen creating the VDB Group.		
Summary	Add Tags				
	Enter Tag Key	Enter Tag Value	+ Tag		

#### 2. Provision Point

Configuration		ion Point						
Provision Point		w you would like ect VDBs	to provision this VDB Group					
Operation Order for VDBs	Search						Search (All)	~
Summary								
		Status	Name	Creation Date	Last Refresh	Platform	Engine	
		RUNNING	CDOMLOSR50BDPDB1_PD8	Sep 24, 2024 1:36 PM GMT+5:30		Oracle 19.11.0.0.0	upgrade	P
		RUNNING	CDOMLOSRB5A3PDB1dSource_BG2	Oct 7, 2024 8:15 PM GMT+5:30		Oracle 18.3.0.0.0	test-de	/elop
		INACTIVE	VCDO_W9N	Oct 3, 2024 3:54 PM GMT+5:30		Oracle 19.19.0.0.0	km-eng	ine
		RUNNING	VDBO_3Y3	Sep 11, 2024 6:42 PM GMT+5:30	Sep 30, 2024 3:33 PM GMT+5:30	Oracle 19.19.0.0.0	km-eng	ine
		RUNNING	Vsaurabh_nxqsQwaS	Sep 27, 2024 1:25 PM GMT+5:30		First_Plugin	km-eng	ine
						1 to 5 of 5 <	Page 1 of 1	>

• Select one or multiple VDBs to include in the group based on user needs.

#### 3. Operation Order for VDBs

• Add the order for the selected VDBs to ensure the operations are run sequentially for each of them.

		Operation Orde	er for VDBs						
0 00	nfiguration		ch the operations will be pe	rformed on the VDBs					
O Pro	ovision Point	Order	Status	Name	Creation Date	Last Refresh	Platform	Engine	Compliance
• Ор	eration Order for VDBs	0	RUNNING	CDOMLOSRB5	Oct 7, 2024 8:1		Oracle 18.3.0.0.0	test-develop	Not Masked
Su	mmary		RUNNING	CDOMLOSR50	Sep 24, 2024 1:		Oracle	upgrade	Not Masked
		1					19.11.0.0.0		

#### 4. Summary

• Review the configurations and click **Save VDB Group** to finalize the creation process.

create VDB Group					
Configuration	Summary Review the configuration profile for this VDB Group				
Provision Point	VDB Group	VDBs			
Operation Order for VDBs	VDB Group Name ddd	Order	VDB Name	Engine	Platform
Summary	VDB Tags No tags added	0	CDOMLOSRB5	test-develop	Oracle 18.3.0.0.0
		1	CDOMLOSR50	upgrade	Oracle 19.11.0.0.0
			Ci	ancel Back	Next Create VDB

## 7.7.3.4 Viewing and managing VDB Groups

Once created, VDB Groups are displayed in a list with several columns of information: **Name, Status, Platform, Last Refresh, Tags** 

Users can select the **View** button from the group list to open the details page of the selected VDB Group.

CONTROL TOWER	Home Data Complianc	e Insights Admin			Bootstrap Admin f1e90de8-55ec	-4659-96bb-351c0f278a68 8
Data Management $\vee$	VDB Groups					+ VDB Group
Bookmarks	-	across your Delphix infrastructu	~			
dSources	An overview of VDB Gloups	across your Deipnix innastructu	le.			
VDBs	Search					Search (All)
VDB Groups						
VDB Config Templates	Name	Status	Platform	Last Refresh	Tags	
Policies >	Group 1	😔 Running	Mixed		Add Tags >	View >
Data Infrastructure >	Group 2	😔 Running	Mixed		Add Tags >	View >
					1 to 2 of 2	2 < Page 1 of 1 >

#### 7.7.3.4.1 VDB Group detail page

The detail page for each VDB Group includes two tabs:

#### 1. Overview tab

- Status: Displays the status of each VDB within the group.
- Number of VDB sets: Indicates the number of VDB sets.
- Details: Includes information such as Last Refresh and Tags.

ONTROL Home Data Compliance Insights Admin	Bootstrap Admin f1e90de8-55ec-4659-96bb-351c0/278a68 3
VDB Groups > Group 1 C Back Group 1 ex7/924338:cf4a1bf04e116c7eeb397 Overview VDBs Bookmarks Access	Refresh Actions -
VDBs Out of Sync	Number of VDB Sets 2
Details	Tags 🗸 Edit
Last Group Refresh None	No tags added

#### 2. VDBs Tab

• Displays the VDBs that are part of the VDB Group, with the following columns of information: Status, Name, Creation Date, Last Refresh, Platform, Engine, Compliance, Tags

	TROL Home Data	Compliance Insights	Admin			🖶 Bootstrap	Admin f1e90de8-55ec-46	59-96bb-351c0f278a68 😫
< Back GI	3 Groups > Group 1 roup 1 924838cf46a1bf04e116c7ecb397							Refresh Actions -
	VDBs Bookmarks Were Refreshed Independenti r more of your VDBs were refre		a VDB Group refresh to real	ign them.				
								age VDBs
Order 0	Status	Name VDBO_3Y3	Creation Date Sep 11, 2024 6:42 PM	Last Refresh Sep 30, 2024 3:33 PM	Oracle 19,19.0.0.0	Engine km-engine	Compliance Not Masked	Tags >
0	RUNNING	Vsaurabh_nxqsQwaS	Sep 27, 2024 1:25 PM		First_Plugin	km-engine	Not Masked	Add Tags >

3. Bookmarks Tab

 Displays the compatible bookmarks that are part of the VDB Group, with following columns of information: Bookmark Name, Source VDB Group, Creation Date, Expiration Date, Data Timestamp and Tags

CONTROL HO	me Data Compliance Insights	a Admin		😟 🛛 Bootstrap Ad	min f1e90de8-55ec-4659-96bb-	-351c0f278a68 😫
<pre>     VDB Groups &gt; Gro     Group 1     e37f924838cf46a1bf04 </pre>	e116c7ecb397				Refre	sh Actions -
Overview VDBs E	Access					Search (All) ¥
Bookmark Name	Source VDB Group	Creation Date	Expiration Date	Data Timestamp	Tags	
km-bm-2	Group 2	Oct 8, 2024 11:54 AM GMT+5:30	Oct 11, 2024 12:00 AM GMT+5:30	Oct 8, 2024 11:54 AM GMT+5:30	Add Tags >	Actions i
					1 to 1 of 1 <	Page1of1 →

#### 4. Access Tab

• Displays the access, with the following columns of information: User, Access Groups, Permissions

DATA CONTROL Home Data Compliance Insights Admin TOWER	尊 Bootstrap Admin f1e90de8-5Sec-4659-96	bb-351c0f278a68 😫
VDB Groups > Group 1     Group 1     e37924838c446a1bf06e116c7ecb397	Re	fresh Actions -
Overview VDBs Bookmarks Access		
User Access Groups	Permissions	
1 Bootstrap Admin	<ul> <li>Create Bookmark</li> <li>&gt; Delete</li> <li>&gt; Delete Bookmark</li> <li>&gt; Disable</li> <li>&gt; Enable</li> <li>&gt; Force Unlock</li> <li>&gt; Lock</li> <li>&gt; Lock for Other Account</li> <li>&gt; Manage Tags</li> <li>&gt; Provision from Bookmark</li> <li>&gt; Read</li> <li>&gt; Read</li> <li>&gt; Read Bookmark</li> <li>&gt; Refresh</li> <li>&gt; Refresh from Bookmark</li> <li>&gt; Start</li> <li>&gt; Stop</li> <li>&gt; Unlock</li> <li>&gt; Update Bookmark</li> </ul>	View >
Kapil Mittal kapil mittal	<ul> <li>Create Bookmark</li> <li>Delete</li> <li>Delete</li> <li>Delete Bookmark</li> <li>Delete Bookmark</li> <li>Delete Bookmark</li> <li>Manage Tags</li> <li>Provision from Bookmark</li> <li>Refresh</li> <li>Refresh from Bookmark</li> <li>Start</li> <li>Stop</li> <li>Unlock</li> <li>Update Bookmark</li> </ul>	View >
3 Bootstrap Admin f1e90de8-55ec-4659-96bb-351c01278a68	<ul> <li>create Bookmark</li> <licreate bookmark<="" li=""> <licreate bookmark<="" li=""> <licreat< td=""><td>View &gt;</td></licreat<></licreate></licreate></ul>	View >
alhost:4200/dct/data/vdb-groups/e37f924838cf46a1bf04e116c7ecb397/access	◦- Provision from Bookmark ◦- Read ◦- Read Bookmark ◦- Refresh	

The Actions menu in the top corner of this page has the following options:

- Delete: Delete the VDB Group.
- Create Bookmark: Creates a bookmark on the VDB Group.
- **Start**: Starts all VDBs within the VDB Group.
- **Stop**: Stops all VDBs within the VDB Group.
- Enable: Enables all VDBs within the VDB Group.

- **Disable**: Disables all VDBs within the VDB Group.
- Lock: Locks all VDBs within the VDB Group.
- **Unlock**: Unlocks all VDBs within the VDB Group.

### 7.7.3.4.2 VDB Group refresh from the Latest Point-in-Time

- 1. Click **Refresh** in the top right corner of a VDB Groups' details page for the Refresh wizard.
- 2. In the Select Refresh Source tab, choose the Parent Refresh option.
- 3. In the **Refresh Point** tab, there is now an option to refresh from **Latest Point in Time (slower)**, in addition to the Latest Snapshot option (selected by default).

Data Refresh	
Select Refresh Source     Refresh Point     Summary	Refresh Point         Select the strategy for selecting the point on each VDB's parent's timeline         Latest Snapshot         Automatically select the latest snapshot on each VDB Parent         Latest Point in Time (slower)         Automatically select the latest data available on each VDB Parent

- 4. The Summary page will show the latest point in time for each VDB under Date/Time.
  - a. There are 6 VDB results shown at one time, scroll down to show more (load times may vary).
- 5. Use the **Refresh VDB Group** button at the bottom to initiate the process. You do not need to load all the VDB results in order to initiate the refresh.

a Refresh						
Refresh Point     Summary	Summary Review the following to confirm each of your VDBs refresh points within the VDB Group.					
	VDB CDOMSHSR4983PD B1_H8E	>	Source Dataset 1-ORACLE_DB_CONTAINER-34 Date Time Nov 20, 2024 2:20 PM GMT+5:30 Log Delta +02:56:33	VDB DBOM_CWV	>	Source Dataset 1-ORACLE_DB_CONTAINER-32 Date Time Nov 20, 2024 12:38 PM GMT+5:30 Log Delta +04:38:20
	VDB VCDO_OLU	>	Source Dataset 6-ORACLE_DB_CONTAINER-24 Date Time Nov 20, 2024 5:01 PM GMT+5:30 Log Delta +00:16:05	VDB VDBO_CXV	>	Source Dataset 13-ORACLE_DB_CONTAINER-53 Date Time Sep 18, 2024 11:00 AM GMT+5:30 Log Delta +125:57:53
	VDB VDB0_XHJ	>	Source Dataset 6-ORACLE_DB_CONTAINER-22 Date Time Nov 20, 2024 5:01 PM GMT+5:30 Log Delta	<b>VDB</b> Vsou_QLL	>	Source Dataset 13-APPDATA_CONTAINER-38 Date Time Nov 12, 2024 11:46 AM GMT+5:30 Log Delta

#### 7.7.3.4.3 VDB Group refresh to exact date/time (from self)

- 1. Click **Refresh** in the top right corner of a VDB Groups' details page for the Refresh wizard.
- 2. In the Select Refresh Source tab, choose the Parent Refresh option.
- 3. In the **Refresh Point** tab, there is now an option to refresh from **Exact Timestamp (slower)**, in addition to Latest Snapshot (selected by default) and Latest Point in Time.
- 4. Input a timestamp and click Next for the **Summary** page, which provides details for the refresh process.

#### 7.7.3.4.4 Summary page

These details include source name and timestamp information. Here is a breakdown of how the information is shown:

#### Source Name

- 1. Displays the source name, which can be:
  - a. A dSource or VDB in the case of a parent refresh.
  - b. A VDB in the case of a self-refresh.

#### **Date Time Display**

- 1. If a snapshot is found for the specified timestamp, its timestamp will be displayed in the "Date Time" column of the corresponding VDB.
- 2. If the specified timestamp is unavailable for any VDB in the VDB Group, the closest previous snapshot timestamp will be displayed for that VDB, along with a **warning banner**.

3. If no results are available for the specified timestamp, an **error banner** will be displayed against the corresponding VDB in the VDB Group.

#### Log Delta

1. Display the time difference between the timestamp entered by the user and the found snapshot timestamp.

A maximum of 6 VDB results are shown at a time, with additional results loaded by scrolling (load times may vary). The **Refresh VDB Group** button at the bottom can be used to initiate the process without needing to load all the VDB results.

# 7.7.4 Timelines in DCT

### 7.7.4.1 Introduction

A Timeline in Data Control Tower (DCT) helps to visualize and manage the progression and state of Virtual Databases (VDBs) over time; in essence, a chronological sequence of events in the life cycle of a VDB. The UI implementations of this feature help users trace, access, and manage the various stages of these data environments.

Each event within a timeline could be the creation of a new VDB, refreshing data from its source, or any operational activity that alters the VDB's state. These events are recorded with timestamps to provide a historical record of all activities and changes.

Noteworthy changes in the latest version of DCT include terminology updates, removal of redundant tabs, improved sorting functionalities, and the introduction of new search capabilities.

### 7.7.4.2 Prerequisites

To utilize Timelines, you must have a running DCT Engine or access to DCT Appliance.

### 7.7.4.3 Terms and UI adjustments

- The term **Timeflow** has been updated to **Timeline** throughout the application, aligning terminology more closely with its functionality.
- The **Active Timeflow** tab has been removed from the VDB Details page. This change eliminates duplication, as the Timeline History tab already present on the same page serves a similar purpose.
- Previously, dSource groupings based on time were featured in the Timeline History view. This grouping has been removed to simplify the timeline presentation.

### 7.7.4.4 Sorting capabilities

A new **Sort By** dropdown menu enhances how timelines can be organized, by allowing users to sort timelines using with following options:

- **Timeline Activation** [default]: Timelines are ordered by their activation timestamp, ensuring the active timeline is displayed prominently at the top.
- Timeline Creation: Sorts timelines based on their creation timestamp.
- **Parent Timeline Location**: Organizes timelines by the timestamp of the parent timeline from which the data was refreshed.
- **Origin Timeline Location**: Sorts timelines by the timestamp indicating where the original data (or dSource) originates.

# 7.7.4.5 Timeline metadata and search functionality

- The active timeline is now always expanded to show the current VDB's state and recent activities, making it easier to understand the current context of the VDB.
- Timeline metadata now reflects the selected sort mode, displaying relevant timestamps in a clear and understandable format, such as **Timeline Activation: \<time\>**, improving the ability to track timeline details.
- A search feature has been added to the Timeline History, allowing for searches based on the top-line metadata of the timeline. This feature improves the efficiency of locating specific timelines or activities within the application.

# 7.7.4.6 Feature limitations

Please take note of these limitations regarding timeline metadata:

- **Connectivity issues**: If the engine or appliance connectivity is lost, DCT cannot determine whether a timeline is active or its activation time, resulting in "not available" messages.
- **Renamed timelines**: DCT infers timeline creation time from its default name. If a timeline is renamed, DCT cannot determine its creation time, leading to "not available" messages.
- Engine timezone changes: Creation times are interpreted in the engine's timezone. If the engine or appliance timezone changes, creation times may not accurately reflect the timeline's true creation time.

# 7.7.4.7 Timeline History

Timeline History can be found by selecting **Details** for any VDB located on the **VDB List** page and then selecting the **Timeline History** tab. This view serves as a developer-centric console that shows the complete history of a VDB, including non-active timelines, which contain information like past test results. It allows developers to curate and access the complete chronology of their testing efforts with operations like renaming individual timeflows, make active, refresh to snapshot, and create bookmark to drive organization and access.

### 7.7.4.7.1 Timeline History UI

The Timeline History UI is comprised of a vertical timeline-based representation of all actionable points of interest (snapshots) for that VDB. The snapshot list is chronologically grouped over blocks of time to easily

identify relevant snapshots to act upon. Once the right snapshot is found, users can access a contextualized action menu by selecting the corresponding ellipsis to the relevant snapshot.

A row at the bottom of each timeline in the Timeline History tab of a VDB shows information about the action that created the timeline and also contains a refresh button, which can directly refresh the VDB back to the Bookmark/Snapshot that was used to originally create the timeline.

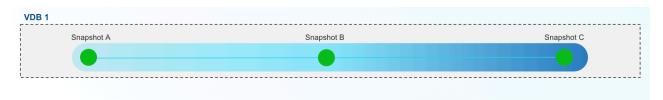
CONTROL TOWER	Home Data Compliance In	sights Admin			@ <b>8</b>
	ILOSR0535PDB1_HLM .OSR0535PDB1_HLI container6	м			Actions -
Overview Timeline Search	History Bookmarks Hooks	Access		Search (All) ~	Sort By Timeline Activation •
	H@2024-05-03T02:15:15 n: May 3, 2024 2:45 PM GMT+5:30				Active Actions :
Origin Source  OCDOMLOSR0535PDB1	Origin Timeline Location  Onumber Additional May 2, 2024 4:01 PM GMT+5:30	Parent Source  OCDOMLOSR0535PDB1	Parent Timeline Location  Parent Timeline Location May 2, 2024 4:01 PM GMT+5:30		
<b>Today</b> May 3, 2024					2
Snapshot 4:00 PM					Actions :
Snapshot 2:49 PM					Actions :
	m CDOMLOSR0535PDB1 tion: May 3, 2024 2:45 PM GMT+5:30				Refresh

DCT has introduced some key fields to enhance data traceability and context understanding.

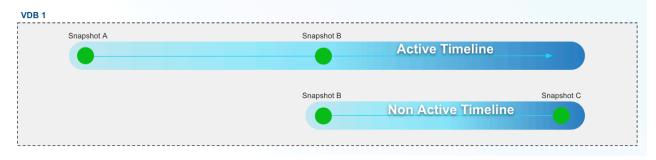
- **Origin Source**: Identifies the top-most parent (dSource) from which the data originated, and clicking on this field redirects users to the origin source's Detail Page for comprehensive insights.
- Origin Timeline Location: Specifies the exact moment in time on the origin source timeline where this data was derived.
- **Parent Source**: Denotes the immediate parent source of the data, with a click-through feature leading to the parent source Detail Page.
- **Parent Timeline Location**: Pinpoints the precise moment in time on the direct parent's timeline from which the data originated, further solidifying the data's lineage and accessibility.

#### 7.7.4.7.2 Non-active timelines

Non-active timelines (previously, "timeflows") are a critical aspect to data virtualization, in addition to being an important tool for developers. Whenever a time-based operation takes place, the previous timeline (and associated data) becomes non-active, and a fresh timeline takes its place.



#### (User Performs "Self Refresh" to Snapshot B)



#### **1** Non-active timeline creation from self-refresh

In this example, a developer has performed a self-refresh (previously, "rewind" or "rollback"). In refreshing Snapshot B, the developer has created a new active timeline that represents a clean slate starting with the data state of Snapshot B. If the developer wants to refer back to the past results, represented on the non-active timeline, they can activate the past timeline by hitting the Make Active button in the DCT UI, or by refreshing to a point in time by referencing the non-active timeline's ID.

For developers, having the ability to catalog (name and tag) and reference past timelines is a critical aspect of application development such as performing ad hoc code validation or manual testing. The Timeline History UI in DCT provides a home for single VDB visibility of all accessible timelines (note: timeline availability is controlled through capacity management and snapshot retention policies).

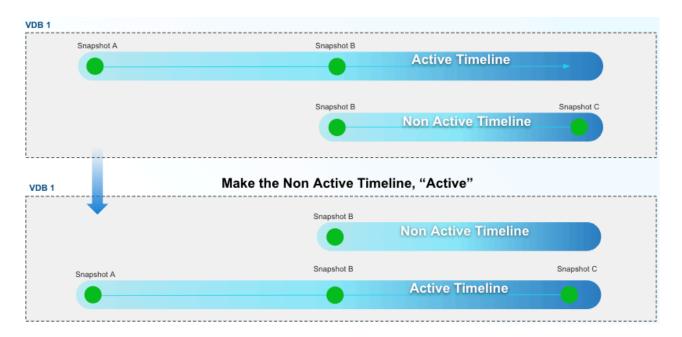
#### 7.7.4.7.3 Time concepts within the Timeline History tab

DCT's UI highlights different notions of time within Delphix (e.g. dSource, VDB, and VDB lineages) and how they relate to one another. These time-based relationships are exposed in the Timeline History view to drive accurate testing for developers.

The "Based on dSource time" designation helps to drive awareness of the relationship between a VDB and its dSource provision point (in most cases this will equate to the production database's state at that time), which is helpful for use cases such as capturing data from a meaningful event. As a VDB refreshes to newer snapshots on a dSource, those changes of data state are grouped separately on the Timeline History view as they represent completely different data.

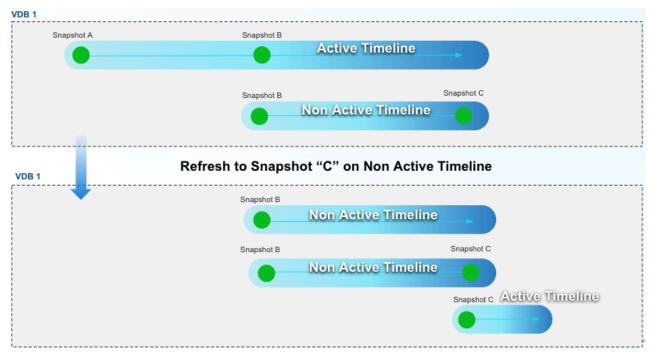
#### 7.7.4.7.4 Timeline operations

To reference another timeline, like one from the past, select it and use the **Make Active** button. This would make the timeline active, so that the data therein can be accessed.



#### 7.7.4.7.4.1 Refresh to snapshot

Included within each timeflow are snapshots that can be accessed via a dropdown menu under each timeflow. If given the right permission, a developer can refresh the VDB to that snapshot. While this may seem similar to Make Active, there are underlying differences; a refresh will reprovision the VDB based on that point in time, whereas, Make Active simply changes the reference to different blocks of the underlying storage.



#### 7.7.4.7.4.2 Create bookmark

A snapshot allows developers to convert it into a DCT Bookmark (see page 233), which enables them to assign a name and special retention policy to that time reference. This also enables stronger collaboration between developers, as bookmark references can be used for a sibling refresh operation.

#### 7.7.4.7.4.3 Rename timeline

Curate timelines to correspond with tests by renaming them to easily reference the resulted data. This action can be performed by clicking the ellipsis on the timeline to reach a drop-down menu. This menu includes the option to rename which will open a dialog box to input a new name. The input is prefilled with the current timeline name by default. The changes may take a short time to be reflected in the UI.

CONTROL Data Compliance Insights Admin TOWER		Θ
VDB CDOMLOSR421FPDB1_93T ID: 2-ORACLE_DB_CONTAINER-15	Rename Timeflow           Name           DB, PROVISION@2023-03-20T16:23:31	-
Overview Active Timeflow Timeflow History Bookmarks	Cancel Rename	
DB_PROVISION@2023-03-20T16:23:31		Active 1
5 days ago Mar 22, 2023 6 days ago		0

#### 7.7.4.7.4.4 Delete timeline

Delete timelines via the UI by selecting the ellipsis next to the corresponding timeline and selecting delete. When clicked, this opens a confirmation dialog. Once confirmed, a job is kicked off to delete the timeline. This menu item is disabled for the currently-active timeflow.



#### 7.7.4.7.5 API documentation

While the DCT UI provides a visual aspect to timeflow chronology and grouping, the DCT API has all of the necessary instrumentation to integrate these concepts into automation. The formal documentation can be found via DCT's Swagger docs or the **Developer resources** documentation section. This portion of the timeline documentation will provide some general examples:

#### 7.7.4.7.5.1 Get a list of a VDB's timelines

This simple call will enable the listing of the entire timeflow roster underneath a VDB enabling a developer to take inventory and action.

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/timeflows/search?limit=50&sort=id' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "filter_expression": "dataset_id eq '\''1-ORACLE_DB_CONTAINER-2'\'''
}'
```

#### 7.7.4.7.5.2 The UPDATE timeflow API can be used to change a timeflow's name

Once the appropriate timeflow is found, developers can rename the timeflow to align with a naming scheme or other relevant designations such as a compatible code branch.

```
curl -X 'PATCH' \
    'https://<APPLIANCE_ADDRESS>/v3/timeflows/1-ORACLE_TIMEFLOW-7' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "name": "Latest on refresh state"
}'
```

#### 7.7.4.7.5.3 List all the snapshots for a timeflow

Developers can then use the snapshot API to find all relevant "actionable" points in time on the identified timeflow. The below example shows how to only expose snapshots on a particular timeflow. From there, developers can feed the relevant snapshot ID into refresh or provision endpoints or create a bookmark reference from that snapshot.

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/snapshots/search?limit=50&sort=id' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "filter_expression": "timeflow_id eq '\''1-ORACLE_TIMEFLOW-7'\''"
}'
```

## 7.7.5 Locking and unlocking a VDB

This feature allows users with **LOCK** and **UNLOCK** permission to lock and unlock a VDB, similar to the lock/ unlock feature available via Self-Service containers on the Continuous Data Engine.

The VDB can be locked by a user with **LOCK** permissions for that particular VDB. Once a VDB is locked, all of the VDB operations (Refresh, Start, Stop, Delete, and Create Bookmark) are disabled for all other users.

The user needs the **UNLOCK** permission on the VDB to perform an unlock operation. Thus, only the user that locked the VDB **OR** a user with the **FORCE\_UNLOCK** permission can unlock it. The **FORCE\_UNLOCK** permission is only granted to the **admin** system role by default.

Users cannot lock a VDB with refresh policies assigned to it or have any active engine job running at the time of locking.

The VDB details page has the options to lock and unlock a VDB under the Actions menu. All VDBs are in the unlocked state by default, thus, the only option available at first is to lock the VDB.

$\infty$	DATA CONTROL Home D TOWER	ata Compliance	Insights	Admin						θ
< VDBs	VDBs > VCDO_7YQ VCDO_7YQ ID: 47-ORACLE_DB_CONTAINER-16									Actions -
Overvi	ew Active Timeflow	Timeflow History	Bookmarks	s Acc	ess Hook					Enable
										Disable
	Platform							Status		Start
		Oracl	e				R	UNNING		Stop
										Delete
										Create Bookmark
Details				Tags		Edit	Environme	nt Details		Lack
Туре	VDB				No tags adde	d	Environment	Name	bhavik-src	Uniock
Platform Version Size	Oracle 19.11.0 1.05GB						Type OS		Single Instance Linux	
Engine	bhavik-									

A warning message is shown on the VDB detail page if the VDB is locked by a user.

$\langle \rangle$	DATA CONTROL Home <u>Data</u> Co TOWER	ompliance Insights Admin	L.			e	
< VDBs	VDBs > VCDO_7YQ VCDO_7YQ ID: 47-ORACLE_DB_CONTAINER-16					Actions 👻	
Overv	view Active Timeflow Timeflow	History Bookmarks	Access Hook				
	VDB is currently locked     Account: 1 has locked this VDB preventing any refresh actions.						
		Platform			RUNNING	3	
Details		Tag	S	Edit	Environment Details		
Type Platform Version Size Engine	VDB Oracle 19.11.0.0.0 1.05GB bhavik- Sublime Te	ext	No tags adde Successfully locked *		Environment Name Type OS	bhavik-src Single Instance Linux	

Select the Actions menu on a locked VDB to show the unlock action.

$\langle X \rangle$	DATA CONTROL Home Data Co TOWER	ompliance Insights	Admin					e
< VDBs	VDBs > VCDO_7YQ VCDO_7YQ Id: 47-ORACLE_DB_CONTAINER-16							Actions -
Overv	view Active Timeflow Timeflow	History Bookma	irks Access	Hook				Refresh Enable
VDB is currently locked Account: 1 has locked this VDB preventing any refresh actions.         Disable								
	Stop							
		Platform				Status RUNNING	à	Create Bookmark
								Unlock
Details			Tags		Edit	Environment Details		
Type Platform Version Size Engine	VDB Oracle 19.11.0.0 1.05GB Screenshot e			No tags added		Environment Name Type OS	bhavik-src Single Instance Linux	

## 7.7.5.1 Locking and unlocking a VDB via API

DCT also provides a capability for an account to lock the VDB on behalf of another account, but this is an API only feature. For an account to be able to lock the VDB on behalf of another account, it needs to have the LOCK\_FOR\_OTHER\_ACCOUNT permission on the particular VDB.

Formal documentation around the API signature and related payloads can be found via DCT API documentation<sup>125</sup> in the **Developer resources** section. Below is an example of an account requesting to lock a VDB on behalf of an account with account\_id 2.

<sup>125</sup> https://dct.delphix.com/docs/latest/api-references

```
curl --location 'https://<APPLIANCE ADDRESS>/v3/vdbs/<VDB ID or NAME>/lock' \
--header 'Authorization: <APIKEY>' \
--header 'Content-Type: application/json' \
--data '{
    "account_id" : 2
}'
```

# 7.8 Linking Wizard

## 7.8.1 Overview

The DCT version 12.0.0 update marks a significant enhancement to data virtualization capabilities in DCT by introducing the Linking Wizard, which guides the user through intuitive steps to create a dSource.

As of this release, DCT 13.0.0 supports the integration of these types of database sources:

- Oracle sources
  - Staging Push supported
- MSSQL sources
  - Staging Push supported
- ASE sources
  - PostgreSQL, Db2, MySQL, HANA, and MongoDB
- AppData sources

## 7.8.1.1 Limitations in MSSQL dSource linking

The ability to link a dSource from backups managed by third-party tools like NetBackup or CommVault is not supported for MSSQL databases as of yet. Users can still create dSources from live MSSQL databases.

This is a known limitation and may be addressed in future updates to expand the versatility and applicability of the dSource feature in diverse data management scenarios.

## 7.8.1.2 Prerequisites

To utilize the dSource creation feature effectively in DCT 12.0.0, certain prerequisites must be met:

- **Continuous Data Engine registration**: A prerequisite for dSource integration is having a Continuous Data Engine already registered to a DCT instance. This setup is crucial for enabling the core functionalities of data virtualization and synchronization.
- Availability of eligible sources: It is necessary to have access to eligible database sources that can be linked as a dSource. These sources should not already be functioning as a dSource, to avoid redundancy and ensure optimal utilization of the new feature.

## 7.8.2 Using the Linking Wizard

This new wizard can be launched from the dSource list page, giving the user the ability to create a dSource from DCT. The steps are outlined below:

### 7.8.2.1 1. Select Data Source step

Navigate an alphabetically sorted list of data sources, or utilize the search function and pagination to locate and choose the preferred source.

- Upon selecting a source, essential details such as the **Instance**, **Environment Name**, and **Engine Name** are displayed on the right-hand side of the screen. **Database Authentication** will be required.
- To that point, a crucial part of this step includes a database connectivity check. The **Validate** button verifies your connection, ensuring a secure and authenticated progression to the next stages.

Create	and link dSource			×
•	Select Data Source	Select an available Data Source to connect and creat	e a dSource	
0	dSource Configuration		Instance SCL2016	
0	Data Management	Delphix_Admin MSSql 11.3.6523.0	Name Ferrari	
0	Policies	Delphix_Admin MSSql 13.1.4001.0	Database Version 13.2.5233.0	
0	Hooks	Ferrari MSSql 13.2.5233.0	Environment Name	
0	Summary	Ferrari MSSql 13.2.5233.0	Data Type MSSql	
		Impala MSSql 11.3.6523.0	Engine Database Authentication	
		Impala MSSql 11.3.6523.0	O Database User	
		Impala MSSol 11 3 6523 0 1−25 of 58 < > Items per page: 25 ▼	Environment User     Environment User     Domain User with Password Credential     Environment User     qa-ad\delphix	
			Validate	
			Cancel Back Next	Submit

### 7.8.2.2 2. dSource Type step

In this step, select the nature of the dSource being linked. The options available include:

- Source Based dSource: linked directly to a source database.
- Oracle Staging Push: linked to a user-managed Oracle staging database.
- MSSQL Staging Push: linked to a user-managed MSSQL staging database.

Following the selection of the dSource type, users must then choose the associated engine from the dropdown menu, which lists the available engines that have been registered in the DCT environment. This setup dictates the subsequent configuration steps to ensure the linked dSource is correctly aligned with the user's infrastructure and database management strategy.

Create and	d link dSou	ırce				×
<ul> <li>dSource Typ</li> </ul>	e	dSource Type				
		Select a dSource type.				
dSource Con	figuration	O Source Based dSource				
Data Manage	ement	dSource linked to a source database				
		MSSQL Staging Push				
Policies		MSSQL dSource linked to customer managed staging database				
Hooks		Oracle Staging Push				
HOOKS		Oracle dSource linked to customer managed staging database				
Summary		C Select Associated Engine				
		Engine 👻				
			Cancel	Back	Next	Submit

## 7.8.2.3 3. dSource Configuration step

Name your dSource here. By default, the dSource name mirrors the name of the source, but it can be modified. Choose the **Target Group** within the engine to which the new dSource will be added. Add **Notes**, and a **Tag Key** and **Tag Value** pair, if needed. You must also configure any necessary settings required, based on the source.

Select Data Source	dSource Configu	ration		
Select Data Source	dSource Name			
dSource Configuration	Ferrari			
Data Management	Target Group			
but management	A Group		•	
Policies				
Hooks	Notes		4	
HOOKS				
Summary	Enter Tag Key	Enter Tag Value	+ Tag	

## 7.8.2.4 4. Data Management step

The step contains various dSource configurations for optimal data management. The wizard fetches and pre-populates the default values for various data fields, saving you time and reducing manual entry errors.

Create and link dSource				×
Select Data Source	Data Management Managed Backups			
dSource Configuration	Enabled     When enabled, the Delphix Engine will take full backups of the database, per the dSource SnapSyric policy, and validated syric will be disabled. Existing backups cannot be used to synchronize the dSource when backups are managed by Delphix			
Data Management	Recovery Model Full The current recovery model of the source database. Refresh the source environment if this information is out-of-date.			
Policies	Initial Load			
Hooks	Delphix will take a copy-only full backup of your source database     Use the most recent full or differential backup			
Summary	Use a specific full or differential backup			
	Force Compression			
	Backup Paths			
	✓ Autodiscover			
	Validated Sync Mode			
	Full or Differential backups			
	O Full backups			
	O None			
		Cancel Back	Next	Submit

## 7.8.2.5 5. Policies step

Tailor the SnapSync and Retention policies according to your requirements. Default policies are selected initially, but these settings can be modified through the **Select Policy** dialog.

and link dSource						×
Select Data Source	Policies Apply Policy details to dSource.					
dSource Configuration	SnapSync Policy Default SnapSync	Change Policy	Retention Policy Default Retention		Change Policy	
Data Management	Snapshots will be taken:	Change Policy	Snapshots will be removed a	fter		
Policies	At 03:30 AM, only on Sunday (US/Pacific)	Select SnapSync Policy		×		
	At 03:30 AM, only on Monday (US/Pacific) At 03:30 AM, only on Tuesday (US/Pacific)	Select your SnapSync policy for this d	Source			
Hooks	At 03:30 AM, only on Wednesday (US/Pacific	Search				
Summary	At 03:30 AM, only on Thursday (US/Pacific) At 03:30 AM, only on Friday (US/Pacific)	Default SnapSync		~		
	At 03:30 AM, only on Saturday (US/Pacific)	None:SyncPolicy		~		
		aaaaPolicy		^		
		Snapshots will be taken:				
		At 12:53 AM, only on Wednesday (	US/Pacific)			
		At 12:53 AM, only on Thursday (US	S/Pacific)			
		Items per page: 25 * 1 - 5 of 5	< >			
			Cancel Update SnapSy	nc Policy	Back Next Sub	
	Select Data Source dSource Configuration Data Management Policies Hooks	Select Data Source     Policies       dSource Configuration     SnapSync Policy Default SnapSync       Data Management     Snapshots will be taken:       Policies     At 03:30 AM, only on Sunday (US/Pacific) At 03:30 AM, only on Tuesday (US/Pacific)       Hooks     At 03:30 AM, only on Tuesday (US/Pacific) At 03:30 AM, only on Tuesday (US/Pacific) At 03:30 AM, only on Tuesday (US/Pacific)       Summary     At 03:30 AM, only on Friday (US/Pacific) At 03:30 AM, only on Friday (US/Pacific)	Select Data Source       Apply Policy details to dSource.         dSource Configuration       SnapSync Policy         Data Management       Snapshots will be taken:         At 03:30 AM, only on Sunday (US/Pacific)       At 03:30 AM, only on Monday (US/Pacific)         Hooks       At 03:30 AM, only on Tuesday (US/Pacific)         Summary       At 03:30 AM, only on Tuesday (US/Pacific)         At 03:30 AM, only on Tuesday (US/Pacific)       Select SnapSync Policy         At 03:30 AM, only on Tuesday (US/Pacific)       Select SnapSync Policy         At 03:30 AM, only on Tuesday (US/Pacific)       Mone.SyncPolicy         At 03:30 AM, only on Sturday (US/Pacific)       Image Policy         At 03:30 AM, only on Sturday (US/Pacific)       Image Policy         Summary       At 03:30 AM, only on Sturday (US/Pacific)         At 03:30 AM, only on Sturday (US/Pacific)       Image Policy         At 03:30 AM, only on Sturday (US/Pacific)       Image Policy         At 03:30 AM, only on Sturday (US/Pacific)       Image Policy         At 03:30 AM, only on Sturday (US/Pacific)       Image Policy         At 03:30 AM, only on Sturday (US/Pacific)       Image Policy         Image Policy       Image Policy         Image Policy       Image Policy         Image Policy       Image Policy         Image Policy	Select Data Source dSource Configuration Data Management Policies Hooks Summary	Select Data Source dsource Configuration Data Management Policies Hooks Summary  Policy Policy details to dSource.  Policies  At 03:30 AM, only on Sunday (US/Pacific) At 03:30 AM, only on Tursday (US/Pacific) At 03:30 AM, only on Saturday (US/Pacific) At 25:3 AM, only on Turaday (US/Pacific) At 25:3 AM, only on Turada	Select Data Source dSource Configuration Data Management Policies Morks Summary  Policies  Policies Policie  Policies  Policies  Policies  Policies  Policies Policie  Policies Policie  Policies Policie Polici

### 7.8.2.6 6. Hooks step

Enhance the dSource with custom created Hooks. Use the **+ Hook** button to define the scripts that will execute at various stages of the process, offering greater control and customization over the dSource creation workflow.

For Oracle dSources in the linking wizard, a Reorder button is available to rearrange hooks for different operations at various hook points. Additionally, you can add, edit, delete, and reorder hooks on the linked dSource via the dSource Details page under the Hooks tab.

Select Data Source	Hooks			
	Hook Points	Hooks		
dSource Configuration	Select hook point to add hooks on the right.	Hooks run in order from top to bottom, drag hook cards to re-order.	l	+ Hook
Data Management	Pre Sync >	# Custom Created Hook	Remove	🖍 Edit
Policies		Type Run PowerShell Command (with default version)		
Hooks	Post Sync	Script		
nooks		SomeBashCommand		
Summary				

### 7.8.2.7 7. Summary step

Before finalizing, a comprehensive summary of all your configurations is presented. This overview allows you to review and confirm that every detail aligns with the intended setup, ensuring accuracy and completeness. **Submit** the configuration to finish linking your database.

Create	and link dSource			×
0	Select Data Source	Summary Review the configuration profile for this dSource.		
¢ (	dSource Configuration	Source	Data Management	
0	Data Management	Name Ferrari	Managed Backups Disabled	
	Policies	Data Type MSSql	Recovery Model Full	
0	Hooks	Version 13.2.5233.0	Initial Load Delphix will take a copy-only full backup of your source database	
	Summary	Source Environment	Force Compression Enabled	
		Environment User qa-ad\delphix	Backup Paths Autodiscover Validated Sync Mode	
		dSource	Transaction log backups LogSync	
		dSource Ingestion Engine	Disabled Staging Environment	
		dSource Name Ferrari	Repository	
		Dataset Group A Group	SQL2016	
			Cancel Back Next Sub	omit

## 7.8.3 Adding an AppData dSource

The steps to add a dSource in DCT, as outlined in the Linking wizard<sup>126</sup> page, should be still be followed. However, this page covers details specific to adding an AppData dSource to DCT. AppData dSources allow for efficient handling and integration of application data.

Before initiating the linking process, ensure that an AppData type source is already added in DCT.

## 7.8.3.1 Steps effected during the Linking process

#### 7.8.3.1.1 Data Source step

1. **Select AppData source**: Initiate the dSource Linking wizard and select the desired AppData source. This selection is crucial in determining the linking procedure.

<sup>126</sup> https://dct.delphix.com/docs/latest/linking-wizard

	dSource Type	Select Data Source				
		Select an available Data Source to connect and create a dSour	ce			
•	Select Data Source	appdata 😵	Source 1 Details			
	dSource Configuration		Name			
	Data Management	Source 1	Source 1 Environment Name			
	Data Management	nix_staged_python Source 1				
	Policies	nix_staged_python Source 1	<b>Data Type</b> AppData			
	Hooks	nix_staged_python Source 1	Engine			
	HOOKS	nix_staged_python	Environment User			
	Summary	Source 2 nix_staged_python	oracle	÷		
		Source 2 nix_staged_python				
		Source 2 nix_staged_python	Add delay			
		Source 2 nix_staged_python	Add 30 second delay to operation Add Pause			
		myDB Unstructured Files	None	*		
		Items per page: 25 - 1 - 13 of 13 < >	60 second pause in selected method code Add Shell Pause			
		items per page: 23 • 1 - 13 01 13	None	÷		
			60 second pause in selected method inside a run powershell call dsArray Direct Source Array			
				+ Add		

- Dynamic UI form: For an AppData database, a toolkit associated with it contains a linkedSourceDefinition. This definition, essentially a JSON schema, is rendered as a Dynamic UI form alongside the Source list. It outlines the necessary steps for linking sources of this type.
  - Direct AppData source: If selecting a direct AppData source, there's an option for adding advanced settings, provided the linkedSourceDefinition has usesGrandfatheredAppDataProperties set to true.

dSource Type	Select Data Source			
dsource type	Select an available Data Source to connect and create a dSource	ce		
<ul> <li>Select Data Source</li> </ul>	Jearch			
	appdata 🕲	myDB	Details	
Advanced settings	Source I	Name myDB		
dSource Configuration	nix_staged_python Source 1	Environr	nent Name	
	nix_staged_python			
Policies	Source 2 nix_staged_python	Data Typ AppData		
Unaka	Source 2 nix_staged_python	Engine		
Hooks	Source 2 nix_staged_python	- Environn	nent User	
Summary	Source 2 nix_staged_python	postgr	es 🔹	
	myDB Unstructured Files	Ac	lvanced settings	
	source sourabh Second_Plugin			
	source sourabh Second_Plugin		Create and link dSource	
	source sourabh			
	Items per page: 25		Advanced settings	
			Path1	
			Path	
			Path2	•
			Paths of Symlinks to Follow	
			Link1	

#### 7.8.3.1.2 Data Management step

- This step is conditional and appears if:
  - a. The source is a staged type.
  - b. The source, whether direct or staged, requires snapshot parameter configuration.
- **Snapshot Parameters**: These are determined by the toolkit's snapshotParametersDefinition and are presented as a Dynamic UI form.
- Staging Environment selection: Users can choose the appropriate staging environment and user credentials during this step.

Create and link dS	ource			>
dSource Type				
Select Data Source	•			
O dSource Configuration	postgres -			
<ul> <li>Data Management</li> </ul>	Snapshot Parameters			
Policies	Parameters for the first snapshot taken on the new dSource.			
	resync			
Hooks	snapParamArray			
Summary	+ Add			
	Snapshot Parameter Boolean Value			
	A boolean value.			
	Snapshot Parameter Enum Value			
	An enum value.			
	Snapshot Parameter Integer Value			
	An integer value.			
	Snapshot Parameter Number Value			
	An Number value. Snapshot Object			
		Cancel Back	Next Subm	hit

#### 7.8.3.1.3 Completion

Continue through the linking process and after submission, the process of creating an AppData dSource begins. The new dSource will soon be visible on the dSource page, reflecting the configurations made during the linking process.

#### 7.8.3.2 API actions for AppData dSources

This feature for version 2025.1.0 introduces a new API that enables the following update actions on AppData dSources:

- Update basic properties: Modify dSource properties such as name and description.
- Update dynamic payloads: Modify plugin-defined dynamic parameters associated with the dSource.
- Update pre-sync and post-sync hooks: Configure the pre-sync and post-sync hooks for the dSource.
- Update source database properties: Modify the environment user property of the source database.
- Update staging database properties: Update the staging environment and staging environment user properties for the staging database.
- Apply policies: Configure sync and retention policies for the dSource.

Visit https://help-api.delphix.com/dct/cd/2025.1.0 and search "AppData" in the top left search bar for the corresponding API calls.

## 7.8.4 Adding an Oracle Staging Push dSource

This page outlines the process for adding an Oracle Staging Push dSource within Delphix Data Control Tower (DCT). This functionality is crucial for managing Oracle databases, particularly in environments where staging operations are pushed to target engines. Integrate Oracle Staging Push dSources into your DCT setup by following the Linking Wizard steps.

## 7.8.4.1 Prerequisites

Ensure that a target engine, with the source backup already cloned, is registered in the DCT before beginning the linking process.

## 7.8.4.2 Linking process

#### 7.8.4.2.1 dSource Type step

- 1. **Select dSource type**: Begin the dSource Linking Wizard and choose the 'Oracle Staging Push' option.
- 2. **Target engine selection**: From the engine dropdown, select the desired target engine where the source backup is located.

#### 7.8.4.2.2 dSource Configuration step

- Select dSource configuration: Depending on the type of Oracle database (CDB, PDB, or single tenant), select the appropriate dSource configuration.
- **Database details**: Based on the previous selection, enter the necessary details that would appear as shown in the screenshot below.

Create and link dS	ource	×
dSource Type	dSource Configuration	
<ul> <li>dSource Configuration</li> </ul>	DSod_7491E1YN	
<b>.</b>	Target Group	
Data Management	Untitled	
Hooks	Database Type	
Summary	O Non Multi Tenant	
Gunnary	CDB	
	○ PDB	
	Staging Environment delphix.com	
	oracle *	
	Repository	
	/u01/app/oracle/product/19.8.0.0/dbhome_1	
	CDB Name CDOMLOSR	
	CDB Unique Name CDOMLOSR	
	CDOMLOSR	
	Mount Base //mnt/staging	
	Custom Environment Variables	
	var1 <b>Tolete</b>	
	Value	
	var1value	
	+ Add	
	Cancel	Back Next Submit

• **Staging database parameters**: An option to configure Staging Database Parameters is available. If selected, it adds a new step for entering these parameters.

Cr	Create and link dSource					
9	dSource Type	Staging Database Parameters				
0	dSource Configuration	Default	Save as New Template			
•	Staging Database Parameters	Table Text		<b>i</b> +		
0	Data Management	Name	Value			
0	Hooks	parameter	parametervalue			
0	Summary					
			Cancel Bac	k Next Submit		

#### 7.8.4.2.3 Data Management step

• **Enable LogSync**: This step involves the option to enable log synchronization for real-time data updates and management.

Create and link dS	ource				×
dSource Type	Data Management				
dSource Configuration	LogSync				
Staging Database Parameters	LogSync is an add-on service that can synchronize the Delphix Engine within seconds of any change to a source database. LogSync requests and stores changes to log files. By coordinating changed log blocks with snapshots from SnapSync, users can provision VDBs from a specific point in time, either an arbitrary time, or a time relative to the last transaction.				
<ul> <li>Data Management</li> </ul>					
Hooks					
Summary					
		Cancel	Back	Next	Submit

#### 7.8.4.2.4 Summary step

• **Review configuration**: Examine the details of the summary, which includes information about the dSource type, target engine, database details, and any additional parameters set in the previous steps, to ensure all configurations are correct and aligned with the requirements of the Oracle Staging Push dSource.

### 7.8.4.3 Completion

Upon confirming and submitting the details in the Summary step in the Linking Wizard, the process of creating an Oracle Staging Push dSource is initiated. The new dSource will be integrated into the DCT environment and will be available for use once the setup is complete.

## 7.8.5 Adding a MSSQL Staging Push dSource

This page outlines the process for adding a MSSQL Staging Push dSource within Delphix Data Control Tower (DCT). This functionality is crucial for managing MSSQL databases, particularly in environments where staging operations are pushed to target engines. Integrate MSSQL Staging Push dSources into your DCT setup by following the Linking Wizard steps.

#### 7.8.5.1 Prerequisites

Ensure that a target engine, with the source backup already cloned, is registered in the DCT before beginning the linking process.

#### 7.8.5.2 Linking process

#### 7.8.5.2.1 dSource Type step

- 1. Select dSource type: Begin the dSource Linking Wizard and choose the 'MSSQL Staging Push' option.
- 2. **Select Associated Engine**: From the engine dropdown, select the desired target engine where the source backup is located.

Create and link dS	Source	×
dSource Type	dSource Type	
	Select a dSource type.	
dSource Configuration	O Source Based dSource	
Data Management	dSource linked to a source database	
	MSSQL Staging Push	
Policies	MSSQL dSource linked to customer managed staging database	
Hooks	Oracle Staging Push	
	Oracle dSource linked to customer managed staging database	
Summary	Select Associated Engine	
	Engine 👻	
	Cancel Back Next Subm	nit

#### 7.8.5.2.2 dSource Configuration step

• **Configure dSource details**: Enter the dSource Name, Database Name, select a Target Group from the dropdown, and enter Notes or add Tags, if desired.

Cre	eate and link dSo	ource	×
	dSource Type	dSource Configuration	
	dSource Configuration	DSodD6RVW13W	
	Data Management	Database Name DSodD6RVW13W	
	Policies	Target Group OracleDSources	
	Hooks	Notes Test	
	Summary		
		Enter Tag Key Enter Tag Value + Tag	
		Ca	ncel Back Next Submit

#### 7.8.5.2.3 Data Management step

- **Staging Environment selection**: Choose the appropriate Staging Environment to host the staging database from the dropdown list.
- Repository selection: Select the corresponding Repository version.

Create and link dSource						×
dSource Type	Data Management					
dSource Configuration	Staging Environment .co	•				
<ul> <li>Data Management</li> </ul>	This environment will host the staging databa Heed for validated sync. SQL2016	se				
Policies						
Hooks						
Summary						
			Cancel	Back	Next	Submit

#### 7.8.5.2.4 Summary step

• **Review configuration**: Examine the summary, which includes includes information about the dSource type, target engine, database details, and any additional parameters set in the previous steps, to ensure that all configurations are correct and aligned with the requirements of the MSSQL Staging Push dSource.

### 7.8.5.3 Completion

Upon confirming and submitting the details in the Summary step in the Linking Wizard, the process of creating an Oracle Staging Push dSource is initiated. The new dSource will be integrated into the DCT environment and will be available for use once the setup is complete.

### 7.8.6 Advanced dSource creation options

#### 7.8.6.1 Overview

With the release of DCT 15.0.0, advanced options when creating dSources in DCT have expanded.

- Users can now select external backups from NetBackup or Commvault when adding a Microsoft SQL Server (MSSQL) dSource.
- For MSSQL and Adaptive Server Enterprise (ASE) sources, the additional option to use a password vault for database authentication is available with the "Select Data Source" step.
- Transparent Data Encryption (TDE) for Oracle Container Database (CDB) type staging push dSources can now be activated.

• The option to use non-SYS login credentials when linking an Oracle Single Tenant (ST) database is now available, which enhances security and flexibility.

## 7.8.6.2 Prerequisites

To utilize these new features effectively, adhere to the following prerequisites:

- The source database intended for linkage should already be registered within DCT.
- For those opting to use NetBackup or Commvault as their external backup solution when linking an MSSQL source, the necessary backup credentials must be prepared in advance.

## 7.8.6.3 Linking Wizard changes

#### 7.8.6.3.1 NetBackup/Commvault

In the Data Management phase of the Linking Wizard, a "show advanced" option is now available. This addition allows for the specification of external backup configurations, catering to users' preferences for NetBackup or Commvault solutions.

Creat	te and Link dSour	се		×
9	dSource Type	Data Management		
0	Select Data Source	Encryption Key		
0	dSource Configuration	The Encryption key to use when restoring encrypted backups		
٠	Data Management	NetBackup Ingestion		
0	Netbackup Config Template	NetBackup Config Template		
0	Policies	Master Name		
0	Hooks	Source Client Name		
0	Summary	win2016 dc.co		
		Validate		
		Connection is successful Commvault Ingestion		
		Enabled		
			Cancel Ba	ack Next Submit
			Cancer Da	Jun Treat

4 NetBackup checkbox

When selecting NetBackup as the external backup choice, users have the further opportunity to integrate NetBackup configuration templates. This is achieved by selecting the "Configure Netbackup Config Template" checkbox, available in the subsequent step.

Crea	te and Link dSou	rce	×
0	Select Data Source	Hide advanced ^	
0	dSource Configuration	Encryption Key	
	Data Management	The Encryption key to use when restoring encrypted backups	
		NetBackup Ingestion	
0	Policies	Enabled	
0	Hooks	Commvault Ingestion  Enabled	
0	Summary	Commserver Host Name	
		Source Client Name Win-SrC .CO	
		win-tgt .co	
		Validate	
		Connection is successful	
		Cancel	Back Next Submit

5 Commvault checkbox

Upon specifying the desired external backup configuration, it is essential for users to validate these settings to ensure accuracy and compatibility.

The final review of these configurations is available in the Summary step. This stage serves as a last checkpoint before the submission process, where users can verify all entered details are correct. Once satisfied, finish with the wizard to create the dSource, incorporating the selected external backup settings.

#### 7.8.6.3.2 PasswordVault authentication

Upon reaching the Data Source step, users now have the choice to authenticate using a Password Vault. This update supports integration with leading vault solutions, including **HashiCorp**, **CyberArk**, and **Azure**. Selecting this authentication method leverages the security framework of the respective provider, in an effort to provide versatile, secure, and efficient tools for managing database connections within DCT.

Cro	Create and Link dSource ×						
		Select an available Data Source to connect and create a dS	Source				
۰	Select Data Source	Items per page: 25 👻	Data Type MSSql				
0	dSource Configuration		Engine sj-102 .co				
	Data Management		Database Authentication				
Ĭ	,		O Database User				
0	Policies		O Environment User				
0	Hooks		O Domain User with Password Credential				
	Summani		Oomain User with Vault Credential				
0	Summary		- Usemame				
			myVaultUser				
			Delphix display name for this user				
			Select the Enterprise Password Vault system	1			
			cyberVault 👻				
				h			
			Enter the Query String				
			Validate				
			Cancel Back Next S	ubmit			

#### 7.8.6.3.3 TDE for Oracle CDB

The process of creating a Container Database (CDB) dSource within the Oracle Staging Push portion of the Linking Wizard now includes an option for enabling Transparent Data Encryption (TDE). This enhancement is designed to elevate data security by offering encryption at the storage level, thus safeguarding sensitive information.

Upon enabling TDE, users are presented with a choice among three KeyStore configuration types to best suit security needs:

- File-based KeyStore: A traditional, file-based approach to store encryption keys securely on disk.
- Hardware Security Module (HSM): A physical device that manages digital keys for strong authentication and provides a higher level of security.
- Oracle Key Vault (OKV): A comprehensive key management solution that centralizes control over encryption keys and secrets.

Create and Link dSou	rce				×
dSource Type	dSource Configuration				
dSource Configuration	cdb_un				
Data Management	sid				
Hooks	Transparent Data Encryption (TDE)				
Summary	✓ Enabled				
	TDE Keystore Config Type				
	File				
	HSM 🗸				
	ОКУ				
	Custom Environment Variable Files				
	+ Add				
	Auto Staging Push Restart Indicates whether this staging database should be automatically restarted when the target host reboot is detected.				
		Cancel	Back	Next	Submit

#### 7.8.6.3.4 Oracle ST non-SYS credentials

The Oracle Single-Tenant (ST) database linking process within the Linking Wizard now includes the ability for users to provide non-SYS login credentials, allowing for a more secure and restricted access approach. This would be particularly beneficial for organizations that adhere to strict security policies requiring minimal privilege use.

Furthermore, users can now view the nodes of their Oracle ST cluster directly in the Source Instances grid. This feature provides a clearer overview of the database topology.

Creat	e and Link dSou	rce	×
0	dSource Type	Select Data Source	
•	Select Data Source	Select an available Data Source to connect and create a dSource Validation will succeed if the OS User Credentials can access the selected database, and the entered Database User Credentials will be ignored. If the OS User Credentials cannot access the database, the	
0	dSource Configuration	Database User Credentials will be used.	
0	Data Management	Username	
0	Policies	Password	
0	Hooks	Validate	
6	Summary	Hide advanced	
		Non-SYS Username	
		Non-SYS Password	
		Cancel Back Next Submi	it

## 8 Continuous Compliance workflows

Compliance Engines limit any syncing operations while a profiling or masking job is running. When using DCT job **move**, **execute**, or **migrate** operations, please ensure that the target Compliance Engine is in an idle state. Future Compliance enhancements to DCT will remove this limitation.

With the ability to distribute and run jobs, DCT enables advanced Compliance Engine architectures to be orchestrated and monitored using DCT's real-time, persistent relationships with connected Compliance Engines. When syncing a Compliance Engine, DCT will create references for all Compliance jobs on that Engine. These will show up as unique objects tracked by DCT that can now be leveraged with job move APIs.

## 8.1 Listing and searching compliance jobs

When a Compliance Engine is registered with DCT, compliance jobs (referred to as MaskingJobs within the DCT API) on the Engine are automatically ingested and presented as DCT MaskingJob objects.

#### Example of listing all MaskingJobs:

```
curl -X 'GET' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>'
```

Example of searching for OnTheFly MaskingJobs:

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/search' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "filter_expression": "is_on_the_fly_masking eq true"
}'
```

With the new job move APIs, DCT can now be used to power two advanced masking reference architectures<sup>127</sup>: **Software Development Lifecycle (SDLC)** and **Horizontal Scale** architectures. SDLC enables the separation of duties for the development, quality assurance, and production use of masking jobs whereas Horizontal Scale enables the use of a central configuration engine with the movement of jobs to headless compute engines.

<sup>127</sup> https://masking.delphix.com/docs/latest/managing-multiple-engines-for-masking-1

To enable these architectures, DCT has introduced three new operations: Job Copy, Job Execute, and Job Migrate:

- **Copy**: Supports SDLC by copying a job, but maintaining separate references in DCT.
- **Execute**: Supports Horizontal Scale by copying a job, but maintaining the same reference between two copies. DCT will also keep both of these copies in sync.
- Migrate: Supports the movement of a single instance from one engine to another.

## 8.2 Consolidated operations (intelligent syncing)

DCT has simplified the set of operations required to move a job and its dependencies. Previously, orchestrating movement of jobs required three separate API calls: Job Sync, Global Object Sync, and Credentials Update (on the newly created job). DCT has now consolidated all three of these operations into each of the job move APIs. In addition, if two jobs are held in sync (see Job Execute (see page 336)), DCT will auto update synced jobs whenever one of those jobs has been modified (i.e. updated rule set, new algorithms, etc.).

In order to transfer connector credentials with a job as part of the job move, you will need to associate those credentials using the connector credentials API. See sample code below on how to update credentials.

Example of updating a MaskingJob with connector credentials:

```
curl -X 'PATCH' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/d53812ce-9186-485d-a388-44bc52087ead'
    \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "connector_username": "user123",
    "connector_password": "password123"
}'
```

## 8.3 Managing engines (Continuous Compliance)

DCT provides a near real-time list of all connected Continuous Compliance engines and lists them in an aggregate view. From the below screen, Delphix administrators can easily view and manage their engine connections.

CONTRC TOWER	L Data <u>Compliance</u> Insi	ights Admin				e
Compliance Engines	Compliance Engines					Connect Engine
Compliance Jobs	Overview of all compliance engines in	your Delphix ecosystem.				
	Search					Search (All) 🗸 🗸
	Status Name/UUID ↑	Type Running Jobs	Masking Usage/Total	Masking Available Cores	Tags	
	Online Test Engine 2	Masking 9.0.0.0 0	0% 2.00GB	4	View tags (1) >	View >
	Online Test Masking	Masking 9.0.0.0 0	0% 2.00GB	4	Add Tags >	View >

From this screen, administrators can manage engine connects via the "Connect Engine" button on the top right corner. By clicking this button, the below window will appear asking for connection details.

DCT will access the engine as a registered user and, as detailed in the Deployment section, requires both a username and password as well as admin-level access to the engine. For compliance engines, select "Masking" type when registering an engine.

=

Conne	ect Engine		×
۰	Engine Details	Engine Details	
	Authentication	Test Engine 2	
	Security	Hostname uvo1tz4mlcpf5cx4dbg.vm.cld.sr	
	Tags	Choose Engine Type	
	Summary	Virtualization  Masking	

The first two boxes should be checked for DCT to automatically create predefined tags on discovered objects ingested from the engine. This can be done in the **Tags** step of the **Connect Engine** wizard. Checking the box will make Compliance Jobs and Connectors automatically get tagged with the name of their Environment and/or Application on the engine.

Checking the third box will include the engine name as a tag on ingested objects. Finally, checking the last box allows users to set custom tags on ingested objects. Tags will be applied on Jobs, Connectors, and Algorithms.

Connect Engine	×
Engine Details	Tags Add Engine Tags
Authentication	Enter Tag Key Enter Tag Value + Tag
Security	Add Tags to Discovered Objects
Tags	Warning Tags can Grant Access
Summary	Caution: Auto-tagging can modify object access. Review permissions carefully after auto-tagging objects.
	Include engine environment information as a tag on objects with the key "dlpx-environment"
	<ul> <li>Include engine application information as a tag on objects with the key "dlpx-application"</li> <li>Include engine name as a tag on objects with the key "dlpx-engine"</li> </ul>
	Include custom tags on all objects from this engine
	Enter Tag Key Enter Tag Value + Tag
	Cancel Back Next Submit
Auto-tagging can	modify object access. Review permissions carefully after auto-tagging objects.

All existing and new objects from then on will automatically get the configured tags, which are no different from ordinary tags that can be added to objects. The auto-tagging configuration can later be updated in the Data Engine Details page by going to the **Action** menu and selecting **Auto-tagging Configuration**. This will open up a window with a checkbox to enable or disable auto-tagging.

DATA CONTROL TOWER	Data Compliance Insights Admin	<b>e</b>
Compliance Engine	Auto-tagging Configuration	Actions -
cc2f4d56-89ba-af42-c9: Overview Access	Warning Tags can Grant Access Caution: Auto-tagging can modify object access. Review permissions carefully after auto-tagging objects.	Actions
Status Onlin	<ul> <li>Include engine environment information as a tag on objects with the key "dlpx-environment"</li> <li>Include engine application information as a tag on objects with the key "dlpx-application"</li> <li>Include engine name as a tag on objects with the key "dlpx-engine"</li> <li>Include custom tags on all objects from this engine</li> </ul>	age 0.00B of 5.57GB
Details	Enter Tag Key	🖍 Edit
Hostname Ib-21.dcol1.delphix.com Insecure SSL True Unsafe Hostname Check False	Enter Tag Key Enter Tag Value + Tag Cancel Update Settings	tags added
Truststore Filename None Type Compliance Engine		

Disabling auto-tagging will not remove any of the tags that were previously added. Instead, new ingested objects will not have tags automatically applied. In order to delete these tags, this must first be disabled and the tags will need to be deleted manually on all affected objects.

Since auto-tagging can have an impact on access control, non-admins will require special permissions to configure auto-tagging.

- To configure auto-tagging for pre-defined tags when registering an engine for the first time, the account must have a role with the **Configure pre-defined auto-tagging at registration** permission.
- To update the auto-tagging configuration for pre-defined tags on a pre-registered engine, the account must have the **Configure pre-defined auto-tagging** on the ENGINE object they wish to update.

Configuring custom tags also requires another level of permissions.

- To configure auto-tagging with custom tags when registering an engine for the first time, the account must have a role with the **Configure custom auto-tagging at registration** permission.
- To update the auto-tagging configuration's custom tags on a pre-registered engine, the account must have the **Configure custom auto-tagging** on the ENGINE object they wish to update.

Engines	Preview
O- Configure Custom Auto Tagging	Or Configure Custom Auto Tagging at Registration
Configure Predefined Auto Tagging	Or Configure Predefined Auto Tagging at Registration

## 8.3.1 Engine overview

Individual engine details can be seen and acted upon by clicking down on a particular engine detailed view. Once clicked, users will be sent to an "overview" tab that provides relevant metadata related to the engine.

CONT TOWN	TROL Data ER	Compliance	Insights	Admin		θ
Compliance Engines	Compliance Engine Test Engine Access	2				
	Numb	er of Running Job	s		Current Memory Usage	0.00B of 2.00GB
Details Type Compliance Engine Version 9.0.0.0					Tags Data Center: West Coast	Edit

## 8.3.2 Engine-based operations access

Users are able to audit which users have access to this particular engine, what access group they belong to, and the associated permissions that each user has on this engine. Admins are able to click on the "View" button to access further details under the access control screen related to that specific user.

$\infty$	DATA CONTROL TOWER	Data	Compliance	Insights	Admin							9
	Complian	ce Engine							Engines			
< Compliance	e Engines Test	Engine	2						O- Create	O- Create Environm	ment	
Overvie	ew Acce	ess							Orr Delete	Or Manage Tags	O++ Read	
User			Access Gr	oups		Permissions			Or Set Tags	at Object Creation	O- Update	
			1 >			∽ CREAT	E_ENVIRONMENT	◦ DELETE	View >	/		
John Smith johnsmith@e	company.com		John S	Smith >			E_ENVIRONMENT	- DELETE	View >	<i>.</i>		

# 8.4 Compliance jobs

For a Compliance job to be successfully moved (copied or migrated) from a source to a target engine, all global objects referenced by the job (such as algorithms and domains) must be synchronized between both engines. This provides consistency for the masking operations across different environments.

When initiating job operations through DCT, ensure the target Compliance Engine is not engaged in any profiling or masking activities. Future DCT updates will eliminate the need to do this.

- Job UI (see page 322)
- Compliance jobs (read-only) (see page 325)
- Discovery jobs (read-only) (see page 331)
- Copy job (see page 334)
- Execute job (see page 336)
- Migrate job (see page 336)
- Delete job (see page 339)
- Job collection (see page 339)

## 8.4.1 Job UI

8

#### 8.4.1.1 Global compliance jobs list

When connected to a Continuous Compliance engine, DCT will sync and create references to every compliance job on the engine. All of those job references can be found in the global compliance list, which is a taggable, filterable, sortable, and searchable list of all compliance jobs across a connected Delphix ecosystem.

CONTR TOWER				e
Compliance Engines	Compliance Jobs			
Compliance Jobs	Compliance jobs are the configurations that enable you to mask data on your data sources.			
	Search		Search (All)	~
	Name/ID ↑			
	Drupal 9 Custom App Masking 020e35d2-7d60-482c-908b-7825e89ed3e7	View >		
	Drupal 9 Custom App Masking 08edd39c-bbe2-4296-9e10-ac255fdc8722	View >		
	M1-sCRM-Dev 473b6938-106a-4969-bc53-d756f33845fa	View >		
	M1-sCRM-Dev 4ed7691e-cab8-48aa-a14a-62339d9a0534	View >		
	Mask anagrafe 36bfd517-30d0-400f-b950-5ea8985426eb	View >		
	Mask anagrafe bbfd11e9-3cc9-4998-bc40-a624f0a15241	View >		

## 8.4.1.2 Compliance job overview

Individual compliance job details can be seen and acted upon by clicking down on a particular compliance job detailed view. Once clicked, users will be sent to an "overview" tab that provides relevant metadata related to the VDB.

	Compliance Job	
Compliance Jobs	Drupal 9 Custom App Masking	
Overview	Access History	
ob Status : SUCCE itarted at 3:09 AM	EDED	Run Time : 22se
Initializing		
Collecting Co	onfigurations	
Preparing		
	-execution Custom Driver Tasks	
Starting	POI Parinta	
Running Pres		
	st-execution Custom Driver Tasks	
Collecting Int		
Job Complet	ted	
etails	Tags	E
reated		
ay 16, 2022 3:54 AN	4	

## 8.4.1.3 Access tab

Users are able to audit which users have access to this particular compliance job, what access group they belong to, and the associated permissions that each user has on this job. Admins are able to click on the "View" button to access further details under the access control screen related to that specific user.

CON TOW	TROL Data	Compliance Insights Ad	nin	
	Compliance Job			Masking Jobs
Compliance Jobs	Drupal 9 Cus	tom App Masking		-
	ID: 020e35d2-7d60-482c-	908b-7825e89ed3e7		Or CANCEL Or Copy Or Delete
Overview	Access	History		Ow Execute Ow Manage Tags Ow MIGRATE
User		Access Groups	Permissions	Orr Read Orr Update
		1 >		E View >
John Smith johnsmith@company.co	m	John Smith >		E View >

## 8.4.1.4 Execution history tab

The compliance jobs page also includes job execution history. Execution information will be recorded and displayed on this tab, and includes the status (success, running, failed), run time, submit, and end timestamps, and engine on which it ran. Additionally, clicking the "details" button for an execution will display its report.

	ITROL Home Data	Compliance Insights	Admin	e
Compliance Jobs	Compliance Job ComplianceJob1 726617c0-6fe8-49e1-8b25-4ae4633986	4c		
Overview	Access H	istory		
Search				Search (All)
Run Time	Submit Time	End Time $~\psi$	Engine Name	
8	May 3, 2023 6:44 PM	May 3, 2023 6:44 PM	em-masking	Details >
<b>S</b>	May 3, 2023 6:44 PM	May 3, 2023 6:44 PM	em-masking-6013.dc	Details >
⊘	May 3, 2023 6:44 PM	May 3, 2023 6:44 PM	em-masking-6013.dc	Details >
			1 to 3 of 3	< Page 1 of 1 >

### 8.4.1.5 Execution details

The execution details view includes a list of execution events and the execution log. This is particularly useful when troubleshooting failed executions.

Details for succession information, succession	essful executions may also have event ch as warnings.	ts and logs which include relevant						
Error Report								
i Execution event Info This section shows e	ormation xceptions that occured during the job run. More detailed info	ormation may be available in Masking logs.						
Execution Events								
Event	Cause	Description						
JOB_ABORTED	UNHANDLED_EXCEPTION	Listener refused the connection with the foll						
Logs								
Logs 2023-05-05 04:44:13, [thread] INFO com.dmsuite.dmsApplicator.masking.XMLGenerator executeMarshalling - Generate request xml started successfully. 2023-05-05 04:44:13, [thread] INFO com.dmsuite.dmsApplicator.masking.XMLGenerator executeMarshalling - Generate Request xml done successfully. 2023-05-05 04:44:13, [thread] INFO com.dmsuite.dmsApplicator.masking.transformation.MaskingMarshalling createKettleXML - Generate Transformation XML started successfully 2023-05-05 04:44:13, [thread] SEVERE com.dmsuite.dmsApplicator.masking.transformation.MaskingMarshalling handleJobGenerationException - An exception occurred during job generation java.sql.SQLException: Listener refused the connection with the following error: ORA-12505, TNS:listener does not currently know of SID given in connect descriptor								
		ОК						

## 8.4.2 Compliance jobs (read-only)

This iteration aims to elevate the existing compliance jobs feature in DCT by bringing changes to the existing UI experience. These changes include making additional information on jobs and executions available, several UX enhancements, and introducing a brand-new Compliance Job Execution details page—which offers a more granular view into executions, such as the execution components, the events that occurred during, and the recorded logs.

## 8.4.2.1 Change list

### 8.4.2.1.1 Compliance Jobs page

CONTROL TOWER	Home Data Compl	iance Insights Adr	nin							٥	gli <b>8</b>
Compliance Engines	Compliance	e Jobs								Actio	ns 🕶
Hyperscale Orchestrators	-	ne configurations that enab	I								
Compliance Jobs	Compliance jobs are tr	e configurations that end	ne you to mask data o	n your data sources.							
Algorithms										Search	
Data Classes	Search									(All)	~
Data Classifiers											
Connectors	Last Run Status	Name	Execution Type	Туре	Source	Start Time	Run Time	Creation Date	Tags		
Compliance Uploads	Completed	Mask Fixed Width File	Standard	Masking	gli-me-v25	Sep 19, 2024 4:52	35 secs	Sep 19, 2024 3:39	View Tags (1)	vi	iew >
Discovery Policies						PM PDT		PM PDT			
Rule Sets	Completed	Mask Postgres Small	Standard	Masking	gli-me-v25	Sep 17, 2024 11:52	20 secs	Aug 30, 2024 10:05	Add Tags >	Vi	iew >
						AM PDT		AM PDT			
	Completed	Mask VSAM	Standard	Masking	gli-me-v25	Sep 19, 2024 3:43	16 secs	Sep 19, 2024 3:40	Add Tags >	vi	iew >
						PM PDT		PM PDT			
		OTF Job	Standard	Masking	gli-me-v25	None	None	Sep 13, 2024 5:01	Add Tags >	Vi	iew >
								PM PDT			
									1 to 7 of 7 <	Page 1 of 1	>

- The **Execution Type** column was previously named *Job Type*. It shows whether the execution type is Standard or Hyperscale.
- The **Type** column is newly introduced. It shows whether the job is for Masking, Discovery, Tokenization, or Reidentification.
- The **Is On The Fly Masking** column is newly introduced, which is hidden by default, but can be manually toggled on.
- The **Source** column is newly introduced. It shows the engine name in the form of a link that redirects the user to the engine's details page.
- The **Start Time** and **Run Time** columns are newly introduced in lieu of the previous *Last Completed Execution Date* column.

### 8.4.2.1.2 Compliance Job details page

O DATA CONTROL Home Data <u>Compliance</u> Insights Admin TOWER		@ ,
Compliance Jobs > Mask Postgres Small Back Mask Postgres Small		Actio
96606d4c-df20-424d-8fe9-d42c78f51ac6		
Overview Execution History Access		
SUCCEEDED		Start Time: Sep 17, 2024 11:52 AM PDT Run Time: 20
Step 1 - Initializing		
Step 2 - Collecting Configurations		
Step 3 - Preparing		
C Step 4 - Running Pre-execution Custom Driver Tasks (skip)		
Step 5 - Starting		
<ul> <li>Step 6 - Running PreSQL Scripts (skip)</li> <li>Step 7 - Running PostSQL Scripts (skip)</li> </ul>		
Step 8 - Running Post-execution Custom Driver Tasks (skip)		
Step 9 - Collecting Information		
Step 10- Job Completed		
		View Job Execution Details
Details		
Details Job Name OTF Job	Source Connector Postgres DB	
Job Name	Postgres DB Rule Set	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd	Postgres DB <b>Rule Set</b> Simple Postgres RS	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd Execution Type	Postgres DB Rule Set Simple Postgres RS Source	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd	Postgres DB <b>Rule Set</b> Simple Postgres RS	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd Execution Type Standard	Postgres DB Rule Set Simple Postgres RS Source	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd Execution Type	Postgres DB Rule Set Simple Postgres RS Source	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd Execution Type Standard Compliance Job Type	Postgres DB Rule Set Simple Postgres RS Source	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd Execution Type Standard Compliance Job Type Masking	Postgres DB Rule Set Simple Postgres RS Source	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd Execution Type Standard Compliance Job Type Masking Created Sep 13, 2024 5:01 PM PDT Environment	Postgres DB Rule Set Simple Postgres RS Source	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd Execution Type Standard Compliance Job Type Masking Created Sep 13, 2024 5:01 PM PDT	Postgres DB Rule Set Simple Postgres RS Source	
Job Name OTF Job Job ID 58d76e4b-e0eb-4f5f-b9fa-0c7fe31368bd Execution Type Standard Compliance Job Type Masking Created Sep 13, 2024 5:01 PM PDT Environment	Postgres DB Rule Set Simple Postgres RS Source	

• In the top execution status tile section, the **Start Time** now shows both the date and time (previously it was only showing time).

- The top execution status tile now has a **View Job Execution Details** button, which will redirect to the details page for this job's latest execution (the execution details page is a new UI introduced in this feature).
- The **Details** tile now shows much more metadata for the job. The information shown is as follows:
  - Job ID and Job Name
  - Execution Type (Standard or Hyperscale)
  - Compliance Job Type (Masking, Discovery, Tokenization, or Re-Identification)
  - Creation date
  - Environment name on the engine
  - Application name on the engine
  - Rule Set
  - Source (Engine)
  - Only if this is an On-The-Fly Job, we also show the Source Connector

### 8.4.2.1.3 Execution History tab

- These new columns were added. Some columns are hidden by default and need to be manually toggled on (noted below).
  - Rows Processed: The number of rows masked. This is not applicable to JSON.
  - Rows Total (hidden by default): The total number of rows. This is not applicable to JSON.
  - **Bytes Processed**: The number of bytes masked. This is only applicable to JSON files and ASDD profiling jobs on XML files.
  - **Bytes Total** (hidden by default): The total number of bytes. This is only applicable to JSON files and ASDD profiling jobs on XML files.
  - **Started By** (link): DCT user who started this job (from DCT). If the job was not started from DCT, this will not be set.
  - **Queue Duration** (hidden by default): how long this execution spent in the queue (between submit and executing) on the engine.
  - Run Duration: How long this execution took to run.
  - **Total Duration** (hidden by default): How long it took when this job was started from DCT to when it completed on the engine.
  - Start Time: When the job was started to execute.

### 8.4.2.1.4 Execution Details page (new)

This feature introduces a new UI for compliance job execution details. In the **Compliance Job Execution History** list, each execution has a View button, which will take you to the details page for that execution.

D CONTROL Home Data <u>Compliance</u> Insights Admin TOWER		ê gi
Compliance Jobs > Mask Fixed Width File > Execution History > 3a4cb80		
ack 3a4cb804-0dff-4d35-ae87-fa919e47	471a	
verview Execution Components Execution Logs		
UCCEEDED		Start Time: Sep 19, 2024 4:52 PM PDT Run Time: 35 se
Step 1 - Initializing		
Step 2 - Collecting Configurations		
Step 3 - Preparing		
😭 Step 4 - Running Pre-execution Custom Driver Tasks (skip)		
Step 5 - Starting		
🖓 Step 6 - Running PreSQL Scripts (skip)		
Step 7 - Running PostSQL Scripts (skip)		
Car Step 8 - Running Post-execution Custom Driver Tasks (skip)		
Step 9 - Collecting Information		
Step 10- Job Completed		
Step 10- Job Completed		
	Total # of Execution Components	
Details	<b>Total # of Execution Components</b> 1	
Details Job Name	1	
<b>Details</b> Job Name Mask Fixed Width File	-	
Details Job Name Mask Fixed Width File Job ID b667766f-d899-4ef1-89cf-17a2ee04a320	1 Execution Components Masked 1	
<b>Details</b> Job Name Mask Fixed Width File Job ID	1 Execution Components Masked	
Details Job Name Mask Fixed Width File Job ID b667766f-d899-4ef1-89cf-17a2ee04a320 Compliance Job Type Masking	1 Execution Components Masked 1 Execution Components to be Masked	
Details Job Name Mask Fixed Width File Job ID b667766f-d899-4ef1-89cf-17a2ee04a320 Compliance Job Type Masking Environment	1 Execution Components Masked 1 Execution Components to be Masked	
Details Job Name Mask Fixed Width File Job ID b667766f-d899-4ef1-89cf-17a2ee04a320 Compliance Job Type Masking	1 Execution Components Masked 1 Execution Components to be Masked	
Details Job Name Mask Fixed Width File Job ID b667766f-d899-4ef1-89cf-17a2ee04a320 Compliance Job Type Masking Environment Test Masking Env	1 Execution Components Masked 1 Execution Components to be Masked	
Details Job Name Mask Fixed Width File Job ID b667766f-d899-4ef1-89cf-17a2ee04a320 Compliance Job Type Masking Environment	1 Execution Components Masked 1 Execution Components to be Masked	

The **Overview** tab for an execution details page includes a status tile at the top which shows the steps the execution has taken.

It is then followed by a Details tile, which includes a few metadata for the execution, including:7

- Name, ID, Compliance Job Type for the parent job of this execution.
- Environment and Application name.
- The number of execution component masked/discovered, yet-to-be masked/discovered, and the total number.

### 8.4.2.1.5 Execution Components tab

(X) (	OATA CONTROL IOWER	Home	Data	Compliance	Insights	Admin				٥	gli 😝
< Back						y > a676b08e-c30a-4290-9f2f-163774b 8774b0e47f	0e47f				
Overview	Executio	on Compon	ents	Execution Log	js						
Search										Search (All)	~
Name				Progress		Status	Duration	Rows Processed			
fixed-wdith	test.txt			100%		Completed	4 secs	8		D	Details
									1 to 1 of 1 <	Page 1 of	1 >

This tab is part of the execution details page and shows a list of execution components for the execution. By default, we show the name, progress (in percentage), status, duration, and rows processed columns. But there are a few additional columns that can be manually toggled on. Including

- Rows Total
- Bytes Processed
- Bytes Total
- Non-Conformant Data

In addition, each execution component in the list has a Details button which will open a dialog showing the events and logs that occurred for this execution component. Please note, the events and logs are only available when the execution is in a final state (succeeded, failed, or warning). Before then, there is no data to retrieve and therefore the execution component will not have the button.

### 8.4.2.1.6 Execution Logs tab

CONTROL TOWER	Home Data <u>Compliance</u>	Insights Admin	۹	gli 😫
< Back ee518		listory >> ee518682-bfc0-484a-97d2-fbadc84b0161 7d2-fbadc84b0161 nts <u>Execution Logs</u>		
Execution Event	s		Logs	
Execution Event Information     This section shows exceptions	on s that occured during the job run. More detailed in	formation may be available in Masking logs.	2024-09-19 22:42:02,431 [thread] INFO com.dmsuite.web.environment.AsddThreadCommon logToJobInfo - Job gr is complete for execution JOB_ID_12_41 2024-09-19 22:42:02,447 [thread] INFO com.dmsuite.web.environment.AsddThreadCommon run - Job execution st	
Event	Cause	Description	Thu Sep 19 224202 UTC 2024. 2024-09-19 224206,48 [thread] INFO com.dmsuite.web.environment.AsddThreadCommon logToJobInfo - Begin mainframe file Temo-Fixed-Blocked dat, log file is /var/delphix/masking/logs/JobLogs/JOB_JD_12_41/12_41_Der Blocked dat-floes27a=cr60:3916-bcd+9b8bc12a8e.bt ta	
JOB_ABORTED	UNHANDLED_EXCEPTION	An error occurred during data classification: A general failure occurred	2024-09-19 22:42:06,785 [thread] SEVERE con.dmsuite.web.environment.AsddThreadCommon logToJobError - Fa profile mainframe file 'Demo-Fixed-Blocked.dat'	iled to
		during discovery: RuntimeException: Invalid parser configuration:	java.lang.RuntimeException: An error occurred during data classification: A general failure occurred during discove RuntimeException: Invalid parser configuration: [PERSON-DET] has 'redefined' or 'redefines' but couldn't find condit	
		[PERSON-DET] has 'redefined' or 'redefines' but couldn't find condition.	specify the condition in 'redefineConditions' configuration property. at com.delphix.discovery.DiscoveryClient.classifyData(DiscoveryClient.java:124)	
		Please specify the condition in 'redefineConditions' configuration	at com.dmsuite.web.environment.AsddThreadCommon.runProfileTask/AsddThreadCommon.java:770) at com.dmsuite.web.environment.AsddThreadCommon.access\$600(AsddThreadCommon.java:137) at com.dmsuite.web.environment.AsddThreadCommonSWorker.run(AsddThreadCommon.java:1118)	
		property.	at java.util.concurrent.Executors\$RunnableAdapter.call(Executors.java:511) at java.util.concurrent.FutureTask.run(FutureTask.java:266)	
		1 to 1 of 1 < Page 1 of 1 >	at java.util.concurrent.ThreadPoolExecutorSWorker(ThreadPoolExecutor java.1149) at java.util.concurrent.ThreadPoolExecutorSWorker.run(ThreadPoolExecutorJava.624) at java.lang.Thread.run(Thread java.750)	
			2024-09-19 22:42:06,816 [thread] INFO com.dmsuite.web.environment.AsddThreadCommon logToJobInfo - Total n mainframe files completed is 1 2024-09-19 22:42:07,061 [thread] INFO com.dmsuite.web.environment.AsddThreadCommon logToJobInfo - Aggre final profiling results for all fields across all files 2024-09-19 22:42:07,061 [thread] INFO com dmsuite.web.environment.AsddThreadCommon logToJobInfo - Classi Results are expressed as tuples of (Domain, Confidence, MetaClassifierName, DataClassifierName)	gating

This tab is part of the execution details page and shows the events and logs for the execution. The events are shown on the left and logs are shown on the right.

CONTROL Home Data <u>Compliance</u> Insights Admin	⊕ <b># 8</b>
Compliance Jobs > Mask Postgres Small > Execution History > 7bf55d74-5e83-4663-8703-5bdee8131210 C Back 7bf55d74-5e83-4663-8703-5bdee8131210 Overview Execution Components Execution Logs	
Execution in progress. Execution events and logs will be collected and displayed here when the execution has completed.	
Execution Events	Logs
O Execution Event Information This section shows exceptions that occured during the job run. More detailed information may be evailable in Masking logs.	No execution logs available.
Event Cause Description	
No items found	
0 to 0 of 0 < Page 0 of 0 >	

Events and logs are only available when the execution enters a final state (i.e. succeeded, failed, or warning). Before then, this tab will show a warning message. Once the execution transitions to a final state, this page should update once the data becomes available.

## 8.4.3 Discovery jobs (read-only)

DCT has had UI and APIs to expose masking jobs, but not for discovery jobs (profiling jobs). This feature aims to enhance the compliance job entity to incorporate both masking and discovery jobs. With this change, in the compliance job UI, users should now be able to see the discovery jobs alongside the compliance jobs. All existing UI pages that apply to compliance jobs also apply to discovery jobs (certain metadata for readonly may apply/not apply depending on masking vs discovery). And users can also execute the discovery jobs from DCT side in the same way.

CONTROL TOWER	Home Data Compli	iance Insights Adm	nin							i gii 🤃
Compliance Engines	Compliance	Jobs								Actions -
Hyperscale Orchestrators	-									
Compliance Jobs	Compliance jobs are th	e configurations that enab	ie you to mask data ol	n your data sources.						
Algorithms										at
Data Classes	Search									Search (All)
Data Classifiers										
Connectors	Last Run Status	Name	Execution Type	Туре	Source	Start Time	Run Time	Creation Date	Tags	
Compliance Uploads	<ul> <li>Completed</li> </ul>	Mask VSAM	Standard	Masking	gli-me-v25	Sep 19, 2024 3:43	16 secs	Sep 19, 2024 3:40	Add Tags >	View >
Discovery Policies						PM PDT		PM PDT		
Rule Sets		OTF Job	Standard	Masking	gli-me-v25	None	None	Sep 13, 2024 5:01	Add Tags >	View >
								PM PDT		
	<ul> <li>Completed</li> </ul>	Profile Fixed Width File	Standard	Discovery	gli-me-v25	Sep 19, 2024 4:09	7 secs	Sep 19, 2024 3:40	View Tags (1) >	View >
						PM PDT		PM PDT		
	<ul> <li>Completed</li> </ul>	Profile Postgres Small	Standard	Discovery	gli-me-v25	Sep 17, 2024 12:36	8 secs	Sep 3, 2024 5:16	Add Tags >	View >
						PM PDT		PM PDT		
	• Failed	Profile VSAM	Standard	Discovery	gli-me-v25	Sep 19, 2024 3:42	6 secs	Sep 19, 2024 3:41	Add Tags >	View >
									1 to 7 of 7 <	Page 1 of 1 >

The compliance jobs list has been modified to show both the compliance jobs, as well as the discovery jobs. The new **Type** column (which takes the value of Masking, Discovery, Tokenization, or Re-Identification) helps to differentiate the jobs in this list.

# Details

### Job Name Profile VSAM

Job ID 6360e968-0392-441e-9c87-e912955172b4

Execution Type Standard

Compliance Job Type Discovery

Created Sep 19, 2024 3:41 PM PDT

Environment Test Masking Env

Application Test Application Discovery Policy ASDD Standard

Rule Set Profile Simple Mainframe

Source gli-me-v25

All the existing pages for compliance jobs also apply for discovery jobs, but discovery jobs still have some unique metadata. In the Overview tab for a compliance job's detail page, if the job is discovery, there will be a link to the Discovery Policy, as shown above.

DATA CONTROL Home D TOWER	ata <u>Compliance</u> Insights Admin				¢	9i 🔁
	Postgres Small > Execution History > 617 8e-4b73-b2e7-c6976					
Overview Discovery Result	Execution Components Execution L	ogs				
Search						arch All)
Table Name	Column Name	File Name	Field Name	Data Class	Algorithm	
Cars	mileage			ZIP	RepeatFirstDigit	
Driver	age			AGE	dlpx-core:Age SL	
Driver	firstname			FIRST_NAME	dlpx-core:FirstName	
Insurance	insurance_company_name			COMPANY_NAME	BusinessLegalEntityLookup	
					1 to 4 of 4 < Page	elof1 >

Another feature unique to discovery jobs is the Discovery Result tab, which lives inside the execution details page. This tab shows the list of tables/columns or files/fields discovered, and the data classes and algorithms that were assigned to them.

Discovery results are not available until the execution is in a final state (succeeded, failed, or warning). If users enter this tab beforehand, there will be a warning message, and no results will be shown. The page will monitor the status of the execution. After the execution is final and after the data is collected by telemetry, the page will update accordingly.

## 8.4.4 Copy job

A copy job enables the creation of an independent duplicate of a compliance job, which is essential for supporting Software Development Life Cycle (SDLC) workflows (by enabling the independent management of each job instance). Unique references are maintained for every copied job.

### 8.4.4.1 DCT UI process

To execute a copy job through the DCT user interface:

- 1. Navigate to the **Details** page of a compliance job.
- 2. Click on the ellipsis in the top right corner and select **Copy**.
- 3. A dialog will appear, prompting you to select the **target engine**, assign a new **name** to the job, specify **source and target environment details**, and add any relevant **tags**.

### 8.4.4.2 API process

To execute a copy job via the DCT API, the request must include the **target engine and environment details** where the job will be replicated. Using the COPY API with the same target engine and environment acts as a re-sync mechanism, rather than generating a new DCT MaskingJob entity.

Example of API usage for copying a MaskingJob:

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/d53812ce-9186-485d-a388-44bc52087ead/
copy' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "target_engine_id": "2",
    "target_environment_id": "prod-env"
}'
```

### 8.4.4.3 Force overwrite

When copying a compliance job, DCT provides a **force overwrite** option designed to override any existing environment based objects on the target engine with the same name, ensuring the latest job is applied without needing to manually resolve naming conflicts or version discrepancies. This can be particularly useful when updating a job with significant changes that need to be reflected immediately across environments.

Connector credentials are not automatically copied to the target engine due to security considerations. Therefore, the credentials must be explicitly set on the target engine's connector. DCT facilitates this by allowing the search, update, and testing of connectors directly through its UI.

Examples of managing connectors for a MaskingJob:

#### 8.4.4.3.1 Listing connectors

```
curl -X 'GET' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/d53812ce-9186-485d-a388-44bc52087ead/
connectors' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>'
```

#### 8.4.4.3.2 Updating a connector's credentials

```
curl -X 'PATCH' \
    'https://<APPLIANCE_ADDRESS>/v3/connectors/2-DATABASE-23' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "username": "USER123",
    "password": "password123"
}'
```

#### 8.4.4.3.3 Testing a connector

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/connectors/2-DATABASE-23/test' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>'
```

### 8.4.5 Execute job

With recent updates, all job executions are now centralized to the source engine. The Execute endpoint has been optimized to support efficient job management directly from the source engine, ensuring any updates or modifications are directly applied to the job on the source engine.

This enables users to directly identify, copy, and run masking jobs without the need to manage multiple job instances across different engines.

Executing a MaskingJob now requires solely the source engine reference. Continuous Compliance will handle all necessary preparations for job execution within the original environment, eliminating the need for syncing operations to other engines.

Example of executing a MaskingJob:

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/d53812ce-9186-485d-a388-44bc52087ead/
execute' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "source_engine_id": "2"
}'
```

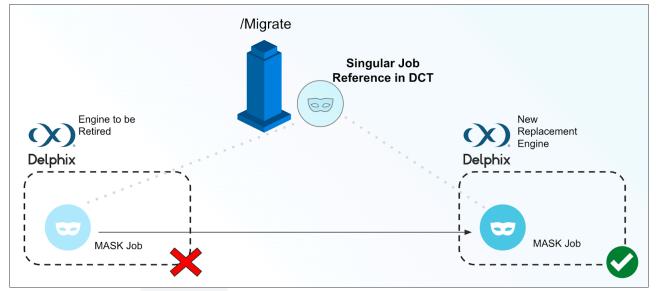
For managing MaskingJob credentials securely, users can update job details including connector credentials through the UPDATE API. This ensures all necessary authentication details are correctly configured within the job settings prior to execution.

Example of updating a MaskingJob with connector credentials:

```
curl -X 'PATCH' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/d53812ce-9186-485d-a388-44bc52087ead'
    \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "connector_username": "user123",
    "connector_password": "password123"
}'
```

### 8.4.6 Migrate job

The Migrate endpoint facilitates the seamless relocation of a masking job from one engine to another, ensuring the job's uniqueness is preserved throughout the process. This is particularly beneficial for organizational tasks, such as transitioning compliance jobs to a new engine in preparation for the retirement of the original engine, or merging jobs from multiple development engines into a single unit for streamlined administration. This operation guarantees that each job retains a singular instance, preventing the creation of duplicates. Moreover, the job maintains its original reference within DCT, providing a smooth transition with minimal disruption to existing workflows and configurations.



Example of finding all MaskingJob originating from engine with ID 2:

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/source-engines/search' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "filter_expression": "source_enigne_id eq '\''2'\'''
}'
```

Example of migrating a MaskingJob to new source engine with ID 3 and placing it in the 'prod-env' environment:

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/d53812ce-9186-485d-a388-44bc52087ead/
migrate' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "target_engine_id": "3",
    "target_environment_id": "prod-env"
}'
```

### 8.4.6.1 Force overwrite

When migrating a compliance job, DCT provides a **force overwrite** option designed to override any existing job on the target engine with the same name, ensuring the latest job is applied without needing to manually resolve naming conflicts or version discrepancies. This can be particularly useful when updating a job with significant changes that need to be reflected immediately across environments.

Connector credentials are not automatically copied to the target engine due to security considerations. Therefore, the credentials must be explicitly set on the target engine's connector. DCT facilitates this by allowing the search, update, and testing of connectors directly through its UI.

Examples of managing connectors for a MaskingJob:

#### 8.4.6.1.1 Listing connectors

```
curl -X 'GET' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/d53812ce-9186-485d-a388-44bc52087ead/
connectors' \
    -H 'accept: application/json' \
    -H 'accept: APPLICATION APPLICATION
```

#### 8.4.6.1.2 Updating a connector's credentials

```
curl -X 'PATCH' \
    'https://<APPLIANCE_ADDRESS>/v3/connectors/2-DATABASE-23' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>' \
    -H 'Content-Type: application/json' \
    -d '{
    "username": "USER123",
    "password": "password123"
}'
```

#### 8.4.6.1.3 Testing a connector

```
curl -X 'POST' \
    'https://<APPLIANCE_ADDRESS>/v3/connectors/2-DATABASE-23/test' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>'
```

### 8.4.7 Delete job

Calling the DELETE API on a MaskingJob will effectively remove the record from DCT (and its execution history) as well as delete the actual masking job on the source engine and on any other engine where the job has been copied to (as a result of execution). The API includes a force option to prevent the action from failing in the event that an engine is unreachable.

Example of deleting a MaskingJob with the force option:

```
curl -X 'DELETE' \
    'https://<APPLIANCE_ADDRESS>/v3/masking-jobs/d53812ce-9186-485d-a388-44bc52087ead?
force=true' \
    -H 'accept: application/json' \
    -H 'Authorization: <API_KEY>'
```

This will return a DCT Job that can be further polled for status updates. Note that if the force option is used and there are ignored errors, details about those errors will be included in the **error\_details** and **warning\_message** fields of the DCT Job as follows:

```
{
    "job": {
        "id": "722ba51cf70e4e32adbd192b07304bb5",
        "status": "COMPLETED",
        "type": "MASKING_JOB_DELETE",
        "error_details": "Unable to connect to the engine.",
        "warning_message": "Failed to remove local MaskingJob, engineId: 3
localMaskingJobId: 7.",
        "target_id": "d53812ce-9186-485d-a388-44bc52087ead",
        "start_time": "2022-01-02T05:11:24.148000+00:00",
        "update_time": "2022-01-02T06:11:24.148000+00:00"
    }
}
```

### 8.4.8 Job collection

DCT version release 2025.1.0 introduces a new type of object named **Job Collection**, which is a convenient way to execute a list of compliance jobs both sequentially and in parallel, or a combination of both.

A Job Collection consists of a list of compliance jobs, called "members". Each member compliance job is assigned a sequence number. When the user executes the Job Collection, it executes the member compliance jobs in ascending order according to their sequence number. This enables both sequential execution and, by means of assigning the same sequence number to multiple members, parallel execution.

Standard compliance jobs and Hyperscale compliance jobs are supported in a Job Collection. While the feature is designed around standard compliance jobs (since a compliance job entity in DCT encapsulates all masking, profiling, tokenization, and re-identification jobs on the engine), they can both be included in a Job Collection.

A UI is available to create, read, update, and delete a Job Collection, as well as manually executing or cancelling one. In addition, a Job Collection can be automatically executed per VDB refresh on a Continuous Data engine. This feature aims to address a pain point of using hook scripts to execute multiple compliance jobs per VDB refresh.

## 8.4.8.1 Job Collections interface

Once logged into DCT, navigate to the Compliance tab at the top, then select the **Job Collections** section on the left.

CONTROL TOWER	Home Data Compliance Insights	Admin		÷ به 🔁
Compliance Engines	Job Collections			+ Job Collection
Hyperscale Orchestrators		It can be used for organizing, executing, and		
Compliance Jobs	Job collections are a collection of jobs that	it can be used for organizing, executing, and	managing joos as a group.	
Job Collections	Search			Search (All)
Algorithms				(40)
Data Classes				
Data Classifiers	Name	Number of Jobs	Tags	
Connectors	> Demo Collection	3	View Tags (1) >	View >
Compliance Uploads	> Mask Hyperscale	2	View Tags (1) >	View >
	> Mask Database	2	Add Tags >	View >
Discovery Policies	> Mask File	3	Add Tags >	View >
Rule Sets				
				1 to 4 of 4 < Page 1 of 1 >

Each row in the Job Collections lists the member compliance jobs, with an expansion arrow left of name of the job. Clicking on the **View** button on a row takes you to the details page of a Job Collection.

Hyperscale Orchestrators   Compliance Jobs	٥	gli
Hyperscale Orchestrators   Compliance Jobs   Jab Collections   Algorithms   Data Classifiers   Compliance Uploads   Diac Collection   Search   Compliance Uploads   Diacovery Policies   Rule Sets   Completed   Mask RS 1   Standard   Masking   me-v28   Jan 7, 2025 7:43   12 secs   Dec 17, 2024   View Tags (4) >   PM PST   1:16 PM PST   Completed   Mask RS 3   Standard   Masking   me-v28   Jan 7, 2025 7:43   12 secs   Dec 17, 2024   View Tags (4) >   PM PST   1:16 PM PST   1:16 PM PST   1:16 PM PST	⊢ Job Colle	ection
Compliance Jobs       Search         Algorithms       Search         Data Classifiers       Name         Connectors       3         Discovery Policies       Name         Rule Sets       Mask RS 1         Status       Standard         Mask RS 2       Standard         Mask RS 3       Standard         Mask RS 1       Standard         Mask RS 3       Standard         Mask RS 1       Standard         Mask RS 3       Standard         Mask RS 1       Standard         Mask RS 1       Standard         Mask RS 2       Standard         Mask RS 3       Standard         Mask RS 1       Standard         Mask RS 2       Standard         Mask RS 1       Standard         Mask RS 2       Standard         Mask RS 3       Standard         Masking       me-v28         Jan 7, 2025 7:43       12 secs         Dec 17, 2024       View Tags (4) >         PM PST       1:16 PM PST         Completed       Mask RS 3       Standard         Mask RS 4       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024 </td <td>,</td> <td></td>	,	
Algorithms         Data Classes         Data Classifiers         Connectors         Compliance Uploads         Discovery Policies         Rule Sets         Completed       Mask RS 1         Standard       Masking       me-v28         Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (4) >>         PM PST       1:15 PM PST       1:16 PM PST       1:16 PM PST         © Completed       Mask RS 2       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (4) >>         © Completed       Mask RS 3       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (4) >>		
Algorithms Data Classes Data Classes Data Classifiers Compliance Uploads Discovery Policies Rule Sets Completed Mask RS 1 Standard Masking me-v28 Jan 7, 2025 7:43 12 secs Dec 17, 2024 View Tags (4) > PM PST 1:16 PM PST Completed Mask RS 3 Standard Masking me-v28 Jan 7, 2025 7:44 12 secs Dec 17, 2024 View Tags (4) > PM PST 1:16 PM PST	Search	~
Name       Number of Jobs       Tags         Connectors       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0       0	(All)	
Data Classifiers       · Demo Collection       3       View Tags (1) >         Compliance Uploads       Last Run Name       Execution Type       Source       Start Time       Run Time       Creation Date         Discovery Policies       Rule Sets       Ocmpleted       Mask RS 1       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (4) >         Ocmpleted       Mask RS 2       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (4) >         Opm PST       1:16 PM PST         Completed       Mask RS 3       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (5) >		
Compliance Uploads       Last Run       Name       Execution       Type       Source       Start Time       Run Time       Creation       Tags         Discovery Policies		
Compliance Uploads       Status       Name       Type       Type       Source       Statue       Rule       Date       Tags         Discovery Policies       Rule Sets       © Completed       Mask RS 1       Standard       Masking       me-v28       Jan 7, 2025 7:43       13 secs       Dec 17, 2024       View Tags (4) >         © Completed       Mask RS 2       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (4) >         © Completed       Mask RS 2       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (4) >         PM PST       1:16 PM PST         © Completed       Mask RS 3       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (5) >	Vie	iew 🕽
Rule Sets         PM PST         1:15 PM PST           © Completed         Mask RS 2         Standard         Masking         me-v28         Jan 7, 2025 7:43         12 secs         Dec 17, 2024         View Tags (4) > PM PST           © Completed         Mask RS 3         Standard         Masking         me-v28         Jan 7, 2025 7:44         12 secs         Dec 17, 2024         View Tags (5) >		
Rule Sets       © Completed       Mask RS 2       Standard       Masking       me-v28       Jan 7, 2025 7:43       12 secs       Dec 17, 2024       View Tags (4) >         PM PST       1:16 PM PST       1:16 PM PST       1:16 PM PST       0 completed       Mask RS 3       Standard       Masking       me-v28       Jan 7, 2025 7:44       12 secs       Dec 17, 2024       View Tags (4) >	View	N >
PM PST         1:16 PM PST           Completed         Mask RS 3         Standard         Masking         me-v28         Jan 7, 2025 7:44         12 secs         Dec 17, 2024         View Tags (5) >		
Completed Mask RS 3 Standard Masking me-v28 Jan 7, 2025 7.44 12 secs Dec 17, 2024 View Tags (5) >	View	N >
PM PST 1:16 PM PST	View	м >
1 to 4 of 4 <	Page 1 of 1	

The **Details** tile in the **Overview** shows the date/time of creation for the Job Collection, while the **Tags** tile shows any associated tags.

The **Configuration** tile has a **Description** (if applicable) and **Job Failure Settings** determines what happens when a member compliance job fails, which can be one of three values:

- · Stop progress if ANY job fails.
- · Stop progress if ANY sequential job fails.
- Attempt to run all jobs ignoring failures.

This can be modified by clicking on the **Edit** button next to the tile's title, which will open an edit window.

The **Actions** menu dropdown includes a list of actions such as executing/cancelling, renaming, and deleting the Job Collection.

CONTROL Home Data Compliance Insights A	Admin			<b>9 او چ</b>
Job Collection > Demo Collection           Back         Demo Collection           ID: 64829381-5648-43a7-9c81-9ecd788906/e           Overview         Execution History				Actions - Execute Cancel
Associated Jobs 3			Last Run Duration 1 min 26 secs	Rename Delete
Details Created Jan 7, 2025 7:42 PM PST	Configuration Description Job Failure Settings	✓ Edit	Tags team: alpha	Edit
	Stop progress if ANY job fails			

The **Execution History** tab shows a list of executions for a Job Collection. Each row is an execution with a **View** option to see the details for that particular Job Collection execution.

$(\mathbf{X})$	DATA CONTROL TOWER	Home D	Data Compliance	Insights	Admin						٥	gli 😫
< Back Overview	Job Collection Demo ( ID: 6e82938b-5b4 Execution	Collect 8-43a7-9c81-0er	ion	Access							Act	ions 🕶
Search											Search (All)	~
Status		Started	Ву	Start Time		End Time	Run Duration	Rows Processed	Bytes Processed			
Comp	pleted	Bootstr	ap Admin	Jan 7, 202	5 7:42 PM PST	Jan 7, 2025 7:44 PM PST	1 min 26 secs	3,000	0.00B		Vie	ew >
										1 to 1 of 1	< Page 1 of	1 >

The **Associated Jobs** tab contains a list of member compliance jobs. In this view, you can add or remove compliance jobs to/from this Job Collection.

To modify the order of a member compliance job, click on the **Edit** button at the top of the page, which will cause the grid to transition to an edit mode. Use numbers to sequence the order.

To add a compliance job to the collection, click on the **+ Jobs** button, which will open a creation window.

Please note that a single compliance job can belong to, at most, **one** Job Collection.

	TA NTROL <b>Home [</b> Wer	Data Compliance	Insights Admin							0	🕴 gli 🧲
< Back	ob Collection > Demo Co Demo Collect :: 6e82938b-5b48-43a7-9c81-0ee	ion									Actions -
Overview	Execution History	Associated Jobs	Access						(	🖌 Edit	+ Jobs
Order 🛧	Last Run Sta	Name	Execution Ty	Туре	Source	Start Time	Run Time	Creation Date	Tags		
1	Completed	Mask RS 2	Standard	Masking	·me-v28	Jan 7, 2025 7:43 PM PST	12 secs	Dec 17, 2024 1:16 PM PST	View Tags (4) >		View
1	Completed	Mask RS 3	Standard	Masking	·me-v28	Jan 7, 2025 7:44 PM PST	12 secs	Dec 17, 2024 1:16 PM PST	View Tags (5) >		View
1	Completed	Mask RS 1	Standard	Masking	·me-v28	Jan 7, 2025 7:42 PM PST	13 secs	Dec 17, 2024 1:15 PM PST	View Tags (4) >		View
								Page Size: 50 •	to 3 of 3 K <	Page 1 of	1 > н

# 8.5 Read-only algorithms

### 8.5.1 Overview

The DCT 17.0.0 release introduces a new functionality that allows users to explore the masking algorithms imported from a Continuous Compliance Engine.

DCT is equipped with a collection of plugins that support masking algorithms. In DCT version 17.0.0, the shipped algorithm plugin versions range from 1.8.0 to 1.21.0 and from 17.0.0.0 to 22.0.0.0.

When a Continuous Compliance Engine is connected to DCT, DCT imports all algorithms from the connected engine, including built-in algorithms, custom algorithms, and algorithms from any installed custom plugins. Revision hashes of algorithms are also imported to DCT. DCT users can interact with the UI or API to check whether algorithms on different engines are in sync or not.

## 8.5.1.1 Feature limitations

All algorithms and their revisions are **read-only**. Users cannot create, delete, or modify algorithms, however, tags can be added or removed from the algorithms.

## 8.5.2 Algorithms page

- Algorithm list view Displays a list of available masking algorithms. Each algorithm entry shows the
  algorithm name, plugin name, framework name, the source engine name and tags. Algorithm
  description and revision hash are optional columns that users can show or hide. Clicking an
  algorithm or the View button redirects to its details overview page.
- Filter and search functionality Allows users to filter and search through the list of algorithms based on names, plugin, framework, or tags.

CONTROL TOWER	Home Data Complianc	e Insights Admin				٥	8
Compliance Engines	Algorithms						
Hyperscale Orchestrators	View and manage algorithr	ns used to mask sensitive	data				
Compliance Jobs							
Algorithms	Search					Search (All)	~
	Name	Plugin	Framework	Description	Tags		
	CommentLookup	dlpx-core	Secure Lookup	Contains 1 generic value	Add Tags >	View	>
	dlpx-core:CM Alpha-Nu	dlpx-core	Character Mapping	An instance of the chara	Add Tags >	View	>
	DummyHospitalNameL	dlpx-core	Secure Lookup	Dummy (non real) hospi	Add Tags >	View	>
	SchoolNameLookup	dlpx-core	Secure Lookup	School and Universities	Add Tags >	View	>
	dlpx-core:CM Numeric	dlpx-core	CM Numeric	A character mapping (C	Add Tags >	View	>
	LastCommaFirstLookup	dlpx-core	Secure Lookup	Last name then a comm	Add Tags >	View	>
	RepeatFirstDigit	dlpx-core	Repeat First Digit	This algorithm masks a	Add Tags >	View	>
	dlpx-core:Phone US	dlpx-core	Phone	The Phone US algorithm	Add Tags >	View	>
					1 to 50 of 53	Page 1 of 2	>

## 8.5.3 Algorithm details page

- Algorithm Overview Displays the selected algorithm's name and plugin, and shows a brief description of the algorithm and its purpose.
- **Dependencies page** Available from the algorithm's details page, this will list any files or other algorithms that the selected algorithm depends on.
- Action buttons Buttons for adding/removing tags, with options to change the name and note of revisions (reflecting the read-only nature of the algorithms).

$(\mathbf{x})$	DATA CONTROL Home Data Complia TOWER	nce Insights Admin		٥	9
< Back Overv	Algorithms > dlpx-core:CM Digits dlpx-core:CM Digits 7cce277f-d7fb-4e82-92ad-7eca4b31658b ew Revisions				
	dipx-co	re	Framework Character Mappi	ng	
Deta	ils		Tags		🖌 Edit
	<b>tion</b> ance of the character mapping (CM) framework m is appropriate for masking text data types wh		No tags added		
origina result f	nn aphiphinae ior masking text data types wi non-digit content of each value. It produces a n or each input when applied to text data-types, bu eric data types.	w, stable, and collision-free masked	ed		

# 8.6 Data Classes/Domains

A

Data Classes are known as Domains on the Continuous Compliance Engine, they identify specific types of sensitive data and which algorithms are used to mask it. DCT recreates all Domains discovered through telemetry as Data Classes. This feature allows users to see all the Data Classes on the DCT-registered Continuous Compliance Engines. The Name, Default Algorithm, Source (engine), and Tags columns are shown by default.

Data Classes are currently read-only, with the exception of updating the description, example, and tags.

This feature allows users to see all the Data Classes on the DCT-registered Continuous Compliance Engines. The Name, Default Algorithm, Source (engine), and Tags columns are shown by default.

CONTROL TOWER	Home Data Compliance	Insights Admin			:	٥
Compliance Engines	Data Classes					
Hyperscale Orchestrators	View and manage sensitive D	Data Classes				
Compliance Jobs	view and manage sensitive L					
Algorithms	Search				Search (All)	~
Data Classes					(All)	
Connectors						
Compliance Uploads	Name	Default Algorithm	Source	Tags		
Rule Sets	PLATE_NO	dlpx-core:CM Alpha-Numeric	dal-qa-v20	Add Tags >	View	>
	MEDICAL_DRUG	dlpx-core:MedicalGenericDrug	lb-19	Add Tags >	View	>
	SECURE_SHUFFLE	SecureShuffle	dal-qa-v20	Add Tags >	View	>
	NAME_TK	NullValueLookup	dal-qa-v20	Add Tags >	View	>
	NAME_TK	NullValueLookup	lb-21	Add Tags >	View	>
	AGE	dlpx-core:Age SL	lb-21	Add Tags >	View	>
	PRECINCT	dlpx-core:CM Alpha-Numeric	lb-21	Add Tags >	View	

There is an additional, optional column for the Default Tokenization algorithm.

Compliance Engines	Data Classe	6				
Hyperscale Orchestrators						
Compliance Jobs	View and manage sensition	tive Data Classes.				
Algorithms	Search					Search
Data Classes						(All)
Connectors						
Compliance Uploads	Name	Default Algorithm	Default Tokenization	Source	Tags	=
Rule Sets	PLATE_NO	dlpx-core:CM Alpha-Nu		dal-qa-v20	Add Tags >	Search
	MEDICAL_DRUG	dlpx-core:MedicalGene		lb-19	Add Tags >	Vame
	SECURE_SHUFFLE	SecureShuffle		dal-qa-v20	Add Tags >	<ul> <li>Default Algorithm</li> <li>Default Tokenization</li> </ul>
	NAME_TK	NullValueLookup	NameTK	dal-qa-v20	Add Tags >	Source
	NAME_TK	NullValueLookup	NameTK	lb-21	Add Tags >	<ul><li>✓ Tags</li><li>✓ View</li></ul>
	AGE	dlpx-core:Age SL		lb-21	Add Tags >	View /
	PRECINCT	dlpx-core:CM Alpha-Nu		lb-21	Add Tags >	View >

## 8.6.1 Overview tab

This tab displays the metadata for a Data Class.

DCT adds optional Description and Example fields to Data Classes. Domains on Continuous Compliance engines do not have these fields, so although the Data Class feature in DCT is currently read-only, these 2 fields are editable in DCT.

$\infty$	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin				۵	9
< Back Overv	Data Class > ACCOU 1edb1a6d-fb82- iew Algorith	UNT_ 4409-9190-03	ГК							Actions	; •
							Example abc-123				
Conf	igurations							🖍 Edit	Tags	1	Edit
Descrij a desci Examp abc-12	iption I <b>e</b>								<b>k1</b> : v1		

# 8.6.2 Algorithms tab

This tab lists the algorithms of the Data Class.

DATA CONTROL TOWER	ome Data <u>Compliance</u>	Insights Admin		÷ 8
C Back Data Class > ACC ACCOUN 1edb1a6d-fb82-4409-9	Т_ТК			Actions -
Overview Algorithms Search	Access			Search (All)
Default	Name	Plugin	Tags	
<ul><li>★ Tokenization Default</li><li>★ Default</li></ul>	AccountTK NullValueLookup	dlpx-core dlpx-core	Add Tags > Add Tags >	View > View >
			1 to 2 of 2	< Page1of1 >

### 8.6.3 Access tab

Standard page for showing users, access groups, and permissions.

## 8.6.4 API endpoints

- GET /data-classes Retrieve the list of Data Classes
- POST /data-classes/search Search for Data Classes
- GET /data-classes/{dataClassId} Get a Data Class by ID
- PATCH /data-classes/{dataClassId} Update the description and/or example for a Data Class
- GET /data-classes/{dataClassId}/algorithms Retrieve the list of algorithms for a Data Class
- POST /data-classes/{dataClassId}/algorithms/search Search for algorithms of a Data Class
- GET /data-classes/{dataClassId}/tags Get tags for a Data Class
- POST /data-classes/{dataClassId}/tags Create tags for a Data Class
- POST /data-classes/{dataClassId}/tags/deleteDelete Tags for a Data Class

# 8.7 Masking connectors (read-only)

DCT offers a set of APIs for viewing, updating, tagging, and testing masking connectors; DCT 17.0.0 introduces a new UI for masking connectors that provides visibility on their configuration and metadata, the ability to update and test the connection, and the ability to view compliance jobs related to the connector. Additionally, more metadata fields have been exposed on the connector object to offer details with a higher level of granularity.

## 8.7.1 Feature limitations

- In DCT 17.0.0, on-the-fly (OTF) jobs in which the connector is a source will not show up in the connector's Jobs tab.
  - In DCT 18.0.0, an Is On The Fly Masking column has been added to signify if the job is an OTF job, as well as a Connector Role column (which can either be Source or Target) to represent if the connector being viewed is a source or target to the job.
- The Rulesets tab on a connector details page shows the data elements count, recording it for each rule set. At present, these two columns only have a value if the type is a database connector.

## 8.7.2 GUI introduction

A new page called **Connectors** is available under the **Compliance** tab from the top navigation bar. This page offers a view of the masking connectors across all connected Continuous Compliance Engines and is updated as connectors are added, removed, or changed on the engine.

The table in this page provides information in columns like connector name, type, platform, host address, source engine, and tags.

There are three potential connector types: **database**, **file**, and **mainframe**. The value under the **Platform** column is different based on the connector type.

- For database connectors, the platform is the database type.
- For file or mainframe connectors, the platform is the connection mode.

CONTROL TOWER	Home Data Compli	ance Insights Ad	nin					٥	e
Compliance Engines	Connectors								
Hyperscale Orchestrators									
Compliance Jobs	An overview of masking	g connectors discovered (	on continuous compliance e	ngines.					
Algorithms	Search							Search (All)	~
Data Classes								(Aii)	
Connectors									
Compliance Uploads	Name	Туре	Platform	Host		Source	Tags		
Rule Sets	-mssql	Database	MSSQL		ol1.delph	Test Engine	View Tags (1) >	View >	>
	Postgres DB	Database	Postgres		new.d	Test Engine	Add Tags >	View >	>
	Oracle Scale	Database	Oracle	172.		Test Engine	Add Tags >	View >	>
	Oracle Scale	Database	Oracle	172.		Test Engine	Add Tags >	View >	>
	File Connector	File	SFTP	127.		Test Engine	Add Tags >	View >	>
	File Connector	File	SFTP	127.		Test Engine	Add Tags >	View >	>
							1 to 10 of 10	Page 1 of 1 >	

See the connector details by clicking on the **View** button in-line for each connector in the list. At the top of this page is an **Actions** menu with two options.

### 8.7.3 Connectors details page

The top of this page is consistent, showing the name of the connector that was selected and an **Actions** menu with two options.

- Edit Connector Opens a window allowing the user to edit connector configurations, including the password.
- **Test Connection** Tests the connection using the provided configuration. The result shows up in the form of a Snackbar at the bottom. If it fails, a detailed description of the error appears.

The sub-sections below are named after the tabs found in this page and describe the purpose of each.

### 8.7.3.1 Overview

This tab lists the details, configurations, and tags related to the connector. The metadata details under the Details tile is based on the connector type (database, file, or mainframe). You can use the Edit button in the Configuration or Tags tiles to modify them as needed.

$\langle X \rangle$	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin				٥	8
< Back Overvi	3-DATABASE-1	-mss	ĺ	Compliance	Access					Actio Edit Conne Test Conne	
				Platform MSSQL					st Masking Job Execution 23, 2024 8:34 AM PDT		
Deta	ils					Configuration	× E	Edit	Tags		🖍 Edit
true Databa Biscuit	tication Credentia se Name e Name Server	ls Set				Hostdelphix.com Port None Username sa			stage: dev		
dbo Oracle											

## 8.7.3.2 Jobs

This tab shows a list of compliance jobs related to the connector, however, on-the-fly (OTF) jobs that the connector is a source of will not show up in the connector's Jobs tab.

$\langle \rangle$	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin			٥	8
< Back	Connector >	-mss mssq							Actio	ns 👻
Overvi	iew Jobs	Rulese	ets	Compliance	Access					
Search									Search (All)	~
Complia	nce Job Name			Last Ran			Туре	Tags		
Maskin	g MSSQL			Apr 23, 2024 8:36	AM PDT		Standard	View Tags (1) $>$	View	>

1 to 1 of 1 < Page 1 of 1 >

## 8.7.3.3 Rulesets

This tab shows a list of rulesets related to the selected connector. It includes counts for the data elements and records.

$\langle \rangle$	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin			٥	9
< Back	Connector	-mssq							Acti	ons 🛨
Overvi	ew Jobs	Rulese	ets	Compliance	Access					
Search									Search (All)	~
Name						Data Elements	Records			
MSSQL	Ruleset					22	821			
								1 to 1 of 1	< Page 1 of 1	>

## 8.7.3.4 Compliance

CONTROL Home Data Compliance	e Insights Admin		⊕ ⊕						
Connector -mssql -mssql 3-DATABASE-1 Overview Jobs Rulesets Compliance	Access		Actions 👻						
Last Profiled Apr 10, 2024 7:46 AM PDTData Elements Total 22Sensitive Data Elements 14Sensitive 14									
Data Element Coverage       Records Coverage         Data element coverage across all known rule sets.       Data records coverage across all known rule sets.         Not Sensitive - 8   36%       Sensitive & Masked - 14   64%       Sensitive & Unmasked - 0   0%									
Not Sensitive - 8   36% Sensitive & Masked -	14   64% Sensitive & Unmasked - 0   0%	Not Sensitive - 721   88% Sensitive & Mas	ked - 100   12% Sensitive & Unmasked - 0   0%						

This tab shows the masking coverage and risk statistics for data of the selected connector.

# 8.8 Managing classifiers (read-only)

### 8.8.1 Overview

DCT 19.0.0 introduces a new read-only user interface for users to view metadata and configurations of their classifier objects across all connected engines, in a centralized location.

### 8.8.2 Accessing the Classifiers UI

- 1. From the top navigation bar, select Compliance.
- 2. In the side navigation, click on Data Classifiers.
- 3. Select the **Classifiers** tab.

This page provides an overview of all classifiers across all engines.

CONTROL TOWER	Home Data Compliance	e Insights Admir					尊 admin-user 🕙
Compliance Engines	Data Classifie	ers					
Hyperscale Orchestrators	Data Classifiers analyze da		eify consitive data hy data	class			
Compliance Jobs	,	sions (Legacy)	sony sensitive data by data	ciuso,			
Algorithms							
Data Classes	Search						Search (All)
Data Classifiers							
Connectors	Classifier Name	Data Class	Framework	Description	Source	Tags	
Compliance Uploads	Account Number - Path	ACCOUNT_NO	Path		vk-masking.dlpxdc.co	View Tags (1) >	View >
Rule Sets	Account Number - Type	ACCOUNT_NO	Data Type		vk-masking.dlpxdc.co	Add Tags >	View >
	Address Line 1 - Path	ADDRESS	Path		vk-masking.dlpxdc.co	Add Tags >	View >
	Address Line 1 - Regex	ADDRESS	Regex		vk-masking.dlpxdc.co	Add Tags >	View >
	Address Line 1 - Type	ADDRESS	Data Type		vk-masking.dlpxdc.co	Add Tags >	View >
	Address Line 2 - Path	ADDRESS_LINE2	Path		vk-masking.dlpxdc.co	Add Tags >	View >
	Address Line 2 - Regex	ADDRESS_LINE2	Regex		vk-masking.dlpxdc.co	Add Tags >	View >
	Address Line 2 - Type	ADDRESS_LINE2	Data Type		vk-masking.dlpxdc.co	Add Tags >	View >
						1 to 50 of 162	< Page 1 of 4 >

## 8.8.3 Classifiers page

The Classifiers page displays a paginated list of classifiers. Each entry in the list includes details such as:

- Classifier Name
- Framework
- Data Class Assignment
- · Other relevant metadata

## 8.8.3.1 Classifier details page

Each classifier in the list includes a **View** button, which opens a dedicated details page. This page provides a higher level of granularity on the classifier's metadata and configuration.

The details page contains three main tabs:

- 1. Overview
  - Displays general metadata about the classifier.

3	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin				٥	admin-user 😫	
< Back Overvie	Accoul 996ac6dd-66a3-4 ew Configur	nt Nun 2aa-bea5-8b4d ration	nber		r - Path							
Framewor Path	k Reject Strengt 0%	h										
Paths												
Match S	trength			м	atch Type		Case Sensitive		Partial Match			
Field Va	lue : (?i)(?>(accou	nt accnt acc	:t)_?-? ?(r	number num nb	r no user))(\$	i[])						
67%				R	EGEX		No		Yes			

#### 2. Configuration

- · Shows the configuration for the classifier.
- The configuration details vary based on the classifier's framework.
- Examples of configurations for each of the four supported classifier frameworks are provided.

$(\mathbf{x})$	DATA CONTROL Home TOWER	Data	Compliance	Insights	Admin			٥	admin-user 😫
< Back Overv	Data Classifiers > C Account N 996ac6dd-66a3-42aa-beat iew Configuration	umbe	r - Path	r - Path					
Deta	ils						Tags		🖍 Edit
	<b>ier Name</b> nt Number - Path						key1: value1		
	INT_NO								
Descrij None	ption								

#### 3. Access

• Displays information about users, access groups, and permissions related to the classifier.

$\langle \mathbf{x} \rangle$	DATA CONTROL Home TOWER	e Data	Compliance	Insights	Admin		٥	admin-user	9
< Back	Data Classifiers > Cl Account N 996ac6dd-66a3-42aa-bea5	umbe	r - Path	er - Path					
Overvie	ew Configuration	Access Access Group				Permissions			
1		1 >				∽ Manage Tags		View )	>
3		3 >				∽ Manage Tags (∽ Read		View	>
4		4 >				∽ Manage Tags ∽ Read		View	>

### 8.8.3.2 Tag management

While the experience is primarily read-only, users have the ability to add or remove tags for each classifier.

### 8.8.4 API Support

Several new APIs have been introduced to support the classifier feature:

- GET /classifiers Retrieve the list of classifiers.
- POST /classifiers/search Search classifiers based on provided filter expressions.
- GET /classifiers/{classifierId} Retrieve a classifier by its ID or name.
- GET /classifiers/{classifierId}/tags Retrieve the list of tags associated with a classifier.
- POST /classifiers/{classifierId}/tags Create new tags for a classifier.
- POST /classifiers/{classifierId}/tags/delete Delete tags from a classifier.

By using these APIs, users can programmatically interact with the classifiers, facilitating integration with other systems and automation processes.

# 8.9 Discovery policies (read-only)

### 8.9.1 Overview

DCT 20.0.0 introduces a read-only experience for discovery policies (formerly known as profiling sets on the engine). This feature allows users to view their discovery policies from a central location across all connected engines.

A new top-level page of the same name, **Discovery Policies**, has been created to for this centralized view. Users can access detailed information about each displayed discovery policy, including metadata and relationships with other objects, such as referenced classifiers or expressions.

Additionally, the Classifiers UI has been enhanced so users can now view a list of discovery policies that reference a specific classifier on the classifier's details page.

No editing abilities are supported, with the exception of adding or removing tags on a discovery policy.

### 8.9.1.1 Limitations for discovery expressions

• Users can view the list of referenced discovery policies for classifiers but not for expressions, due largely to the fact that discovery expressions are considered legacy objects and are discouraged in favor of classifiers. As a result, only a minimal number of features are provided for expressions.

### 8.9.2 GUI access

- Navigate to the **Compliance** section in the top navigation menu.
- Select **Discovery Policies** from the side navigation menu, which provides an overview of all discovery
  policies across all engines.

CONTROL TOWER	Home Data Compliance	e Insights Admin				٥	gli 8
Compliance Engines	Discovery Pol	icies					
Hyperscale Orchestrators	-		consitivity and alacsify consitive data b	hu data class. Data classes	can then be used to assign data-specific algo	rithme to mask data	
Compliance Jobs	Discovery policies use data	classifiers to analyze data for	sensitivity and classify sensitive data i	by uata classes	can then be used to assign data-specific algo	nums to mask data.	
Algorithms	Search					Search	~
Data Classes						(All)	
Data Classifiers							
Connectors	Name	Description	Discovery Method	Source	Tags		
Compliance Uploads	ASDD Standard		Classifiers		Add Tags >	Viev	× >
Discovery Policies	Financial - Legacy		Expressions (Legacy)		Add Tags >	Viev	v >
Rule Sets	HIPAA - Legacy		Expressions (Legacy)		Add Tags >	Viev	v >
	Standard		Expressions (Legacy)		Add Tags >	Viev	× >

• Each discovery policy on the top-level view includes a **View** button that redirects users to the policy's details page. The **Overview** tab displays a list of metadata.

$(\mathbf{X})$	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin					٥	gli	9
< Back Overv	7b453bef-2b63-4	Stand	ard	rd									
Deta	ils						Tags					🗡 Eo	dit
Policy ASDD S	Name Standard							Ν	lo tags adde	d			
<b>Descri</b> j None	ption												
Autom Enable	ated Sensitive Data d	a Discovery	y Support	t									
Assign 1	ment Threshold												

- If a discovery policy uses classifiers as its discovery method, a **Classifiers** tab will be present, listing the referenced classifiers.
  - The classifier details page now includes a new tab titled **Discovery Policies**, which shows a list of policies referencing the classifier object.

X	)   C(	ATA ONTROL OWER	Home	Data	Compliance	Insights	Admin			۵	gli 😫
< Ba	ick		nt Nu	mbe	Account Numbe <b>r - Path</b>	r - Path					
Ov	erview	Configu	ration	Discove	ery Policies	Access					
Sea	rch									Search (All)	~
Na	ne				Description			Discovery Method	Tags		
AS	DD Standa	ď						Classifiers	Add Tags >	Vie	w >

- If a discovery policy uses expressions as its discovery method, an **Expressions** tab will be present, listing the referenced discovery expressions.
- An Access tab on the discovery policy details page displays users, access groups, and permissions
  related to the policy.

CONTROL HO	me Data <u>Compliance</u>	Insights Admin	<b>ع</b> او ش
< Back Discovery Policy > ASDD Sta 7b453bef-2b63-4f4d-80	andard		
Overview Classifiers	Access		
User 1	Access Groups	Permissions	View >
<b>g li</b> gaochang.li@perforce.com	gli	◦⊷ Manage Tags ◦⊷ Read	View >
3	3	◦- Manage Tags ○- Read	View >

### 8.9.3 API endpoints

The following APIs have been introduced:

- GET /discovery-policies List all discovery policies.
- POST /discovery-policies/search Search for discovery policies.
- GET /discovery-policies/{discoveryPolicyId} Retrieve a discovery policy by ID or name.
- GET /discovery-policies/{discoveryPolicyId}/tags Get tags associated with a discovery policy.
- POST /discovery-policies/{discoveryPolicyId}/tags Create tags for a discovery policy.
- POST /discovery-policies/{discoveryPolicyId}/tags/delete Delete tags from a discovery policy.
- GET /discovery-policies/{discoveryPolicyId}/classifiers List classifiers associated with a discovery policy.
- POST /discovery-policies/{discoveryPolicyId}/classifiers/search Search for classifiers related to a discovery policy.
- GET /discovery-policies/{discoveryPolicyId}/expressions List discovery expressions associated with a discovery policy.
- POST /discovery-policies/{discoveryPolicyId}/expressions/search Search for discovery expressions related to a discovery policy.
- GET /classifiers/{classifierId}/discovery-policies List discovery policies associated with a classifier.

• POST /classifiers/{classifierId}/discovery-policies/search Search for discovery policies related to a classifier.

# 8.10 Discovery expressions (read-only)

### 8.10.1 Introduction

In DCT 18, a new read-only page has been introduced for listing discovery expressions, presented as *expressions* within the Continuous Compliance Engine. There are two types of expressions on the engine:

- Search expressions Targeted at finding specific data within data sources.
- Type expressions Used to identify types of data based on schema information.

In DCT, both types of expressions are merged into a single list with an additional column named **Expression Type** to distinguish between them. Despite this primarily being a read-only feature, users are able to add tags to an expression.

Expressions cannot be assigned to any discovery policies (profile sets).

CONTROL TOWER	Home Data Compliance	Insights Admin					e
Compliance Engines	Data Classifie	'S					
Hyperscale Orchestrators		-	sify sensitive data by data class.				
Compliance Jobs	,	ions (Legacy)	sily sensitive data by data class.				
Algorithms							
Data Classes	Search						Search (All)
Data Classifiers							
Connectors	Classifier Name	Data Class	Expression Type	Level	Source	Tags	
Compliance Uploads	ACCOUNT_N0_type_V2	ACCOUNT_NO	Туре	Туре	kchen23	Add Tags >	View >
Rule Sets	ACCOUNT_NO_type_V2_2	ACCOUNT_NO	Туре	Туре	kchen23	Add Tags >	View >
	ADDRESS_LINE2_type_V2	ADDRESS_LINE2	Туре	Туре	kchen23	Add Tags >	View >
	ADDRESS_type_V2	ADDRESS	Туре	Туре	kchen23	Add Tags >	View >
	Account Number	ACCOUNT_NO	Search	Column	kchen23	Add Tags >	View >
	Account_Number_V2	ACCOUNT_NO	Search	Column	kchen23	Add Tags >	View >
	Address	ADDRESS	Search	Column	kchen23	Add Tags >	View >

### 8.10.1.1 Level column

An enumerative column named **Level** has been introduced in DCT. This column indicates the target level of the expression within a data source:

• Type: If the expression is a type expression.

- **Data:** If the expression is a search expression and the dataLevelProfiling attribute is true. This indicates that the expression targets underlying data (e.g., row values in a database column or field values in a file).
- **Column:** If the expression is a search expression and the dataLevelProfiling attribute is false. This indicates that the expression targets the schema of the data source (e.g., column names in a database table or field names in a file).

## 8.10.2 Accessing the Discovery Expressions page

To view the Discovery Expressions page:

- 1. From the top navigation, select **Compliance**.
- 2. In the side navigation, click on Data Classifiers.
- 3. At the top of the list, select **Expressions (Legacy)**.

This page provides an overview of all discovery expressions with their respective types and levels.

# 8.11 Application settings (read-only)

### 8.11.1 Introduction

DCT 21.0.0 introduces a new UI page and API endpoints that provide a read-only experience for Continuous Compliance Engine application settings. This enables users to view their application settings for each connected compliance engine.

## 8.11.2 GUI

Select the Compliance tab and click into a compliance engine's details page from the list. In the details page, a new tab has been created for Application Settings.

$\infty$	DATA CONTROL TOWER	Home D	ata Compliance	Insights	Admin			٥	gli (	8
< Back	gli-me	ngines → gli-n -v22						Act	ions	•
<b>Overv</b> Group	iew Applicat	ion Settings	Access			Name	Value			
~	algorithm (2)									
						LogRateLimitBytesPerSecond	0			
						DefaultNonConformantDataHandling	DONT_MASK			
~	asdd (5)									
						DefaultAssignmentThreshold	1			
						DefaultTableSampleRows	1000			
						DefaultMaximumColumnSize	1024			
						DefaultProfileSetName	ASDD Standard			
						DefaultNullFilterThreshold	75			

## 8.11.3 API

These following APIs were added for this feature:

- GET /management/engines/{engineId}/compliance-application-settings
  - Gets a compliance engine's application settings.
- POST /management/engines/{engineId}/compliance-application-settings/ search
  - Search a compliance engine's application settings.

# 9 Hyperscale Orchestrator UI

# 9.1 Overview

The Hyperscale UI is *Controlled Availability*, meaning that Delphix highly encourages interested customers to reach out to Delphix Product and Engineering for a guided onboarding. Please contact your account team if interested.

To disambiguate object nuances between Compliance Engines, Hyperscale Orchestrators, and DCT, please refer to the following definitions:

- Hyperscale dataset
  - A Hyperscale dataset is a granular unit that defines source and target connector information alongside a defined database schema to be masked (the inventory on a Compliance Engine).
- Hyperscale job
  - A Hyperscale-specific object that is comprised of a rule set along with additional running parameters such as engines to be used and memory settings.
- Hyperscale job execution
  - The execution information such as duration, rows masked, etc. that is sent back to DCT for reporting.

Data Control Tower has the ability to connect to one or more <u>Hyperscale Compliance Orchestrators</u><sup>128</sup>, to serve as a complimentary user interface. The current Compliance Engine/Hyperscale Orchestrator/DCT workflow is as follows:

- 1. Build the foundational objects (rule sets, connectors, inventories, etc.) within the Compliance Engine.
- 2. Build a data set on the Hyperscale cluster by either:
  - a. Importing a compliance job from a Compliance Engine.
  - b. Building the dataset via the connector, dataset, and jobs API on the Hyperscale cluster (DCT will read the new Hyperscale jobs and display them.)
- Set up the DCT-to-Hyperscale connection by following simple steps in the Connecting/ authenticating<sup>129</sup> page. DCT will then create references for any data sets (registered as Hyperscale jobs in DCT), cluster details (e.g. mount points, etc.), and pre-existing engine connections to the Hyperscale Orchestrator.
- 4. Create a Hyperscale job on DCT by selecting an existing masking job and importing the job's inventory and connector information into DCT to represent a hyperscale job. Users have the option to further refine the job details such as defining table-specific masking parameters. A job will appear as a special Hyperscale job on the compliance jobs page.
- 5. Execute a Hyperscale job by selecting the **run** option on the Hyperscale jobs detailed view.

<sup>128</sup> https://hyperscalemasking.delphix.com/docs/latest/

<sup>129</sup> https://dct.delphix.com/docs/10.0.0/connecting-authenticating

6. DCT will recognize this job execution and will present the execution details under the specific Hyperscale Orchestrator's **Details** page.

## 9.2 Implementation introduction

The first step in working with Hyperscale is to register a Hyperscale Orchestrator with DCT. DCT connects to all Hyperscale Orchestrators over HTTPS, some configurations might be required to ensure DCT can communicate successfully.

Begin the Hyperscale Orchestrator registration flow, as well as view currently registered Hyperscale Orchestrators under the **Compliance** -> **Hyperscale Orchestrators** section. The registration wizard will guide you through the steps of the process, some of which are described in further detail below.

### 9.2.1 Truststore for HTTPS

If the CA certificate that signed the Hyperscale Orchestrator's HTTPS certificate is not a trusted root CA certificate present in the JDK, then custom CA certificates can be provided to DCT. If these certificates are not provided, a secure HTTPS connection cannot be established and registering the Hyperscale Orchestrator will fail. The insecure\_ssl Hyperscale Orchestrator registration parameter available as a checkbox option in the registration wizard can be used to bypass the check, however, this should not be used unless the risks are understood.

Get the public certificate of the CA that signed the Hyperscale Orchestrator's HTTPS certificate in PEM format. Your IT team might be required to get the correct certificates. Base64 encode the certificate with:

cat mycertfile.pem | base64 -w 0

Copy the Base64 encoded value from the previous step and configure in the values.yaml file under the truststoreCertificates section. For example, the section might look like this:

```
truststoreCertificates: <certificate_name>.crt: <base64 encode certificate string
value in single line>
```

<certificate\_name> can be any logically valid string value, like "hyperscale".

All certificates configured in the truststoreCertificates section will be read and included in the trustStore, which would then be used for SSL/TLS communication between DCT and Hyperscale.

### 9.2.2 Authentication with Hyperscale Orchestrators

All authentication with a Hyperscale Orchestrator is done with an API Key corresponding to an admin Hyperscale user. The API will be stored and encrypted on DCT itself. The use of a vault to store Hyperscale credentials is currently not supported.

### 9.2.3 Hyperscale deployment type

A deployment type designation must be made for a Hyperscale Orchestrator at the time of registration. The registration UI wizard will present the data type options that are supported. This type must be in line with the type of data source the Hyperscale Orchestrator has been set up to mask (eg, Oracle).

### 9.2.4 Editing and unregistering Hyperscale Orchestrators

Making edits to a Hyperscale Orchestrator's configuration can be done via the UI, in the Orchestrator's overview page via the Edit action in the Details tile.

DATA CONTROL Home TOWER	Data <u>Compliance</u> Insights Admin	0	8
Hyperscale Orchestrate	Update Hyperscale Orchestrator Configuration	Acti	ons 🔻
ID: c44fa828-4fcb-4258-8a5	Host/IP Address		
	API Key		
	Oracle	b	
Details	Insecure SSL Unsafe SSL Hostname Check		✓ Edit
Created: Jan 17, 2024 8:15 AM PST	Truststore Filename		/ Ean
<b>Data Type</b> Oracle	Truststore Password		
Host: Insecure SSL	Cancel Update		
True Unsafe Hostname Check True			
Truststore Filename None			

Unregistering a Hyperscale Orchestrator and removing all its data from DCT can be done via the DELETE API or directly in the UI via the Actions menu.

	TA NTROL Home WER	Data Compliance	Insights Admir	1				@ <b>0</b>
< Hyperscale Orchestrators Overview	hps-ms	Orchestrators > hps-mss sql 9880-4d75-atb4-607935a31997 Accociated Jobs	ql Engine Pool	Mount Points	Connector Configurations	Access		Actions
		Number of Jobs 5					Running Job None	
Details				🖍 Edit	Tags			Edit
Created: Oct 20, 2023 7:42 Host: hps-mssql.dlpxdc							No tags added	

## 9.3 Managing Hyperscale objects

### 9.3.1 Introduction

After registering a Hyperscale Orchestrator, DCT will begin to ingest all relevant data discovered on that Hyperscale instance. This data, in turn, becomes modeled in the DCT world with APIs and a UI to (and manage to a limited extent). Currently, a lot of this data can be navigated to and viewed from the main overview details page of a Hyperscale Orchestrator.

Engin delph	eering Home - Engineering x.atlassian.net/wiki/spaces/EN/ov TOWE		Data	Compliance	Insights	Admin				9
<	Hyperscale Orchestrators Overview	hypers	cale-pr -a8b1-468c-b	ators > hypersca Od a94-9c88e466b90c ciated Jobs	le-prod Engine Po	ol	Mount Points	Connector Configurations	Access	
-										
		Number						Running Job the-big-job		
	Details						Tags			Edit
	Created: Sep 7, 2023 12:58 PN Host:	/ PDT						No tags added		
	eyal-hps.dlpxdc.co									

### 9.3.2 Hyperscale executions

A view of all current and past Hyperscale job executions present on a particular Hyperscale Orchestrator can be found under the Job Executions tab. The **View** link will display additional information, especially for inprogress or failed executions.

X) DATA CON TOW	TROL Home	Data <u>Compliance</u>	Insights Admin				
Hyperscale Orchestrators	hyperso	Orchestrators > hyperscale- cale-prod a8b1-468c-ba94-9c88e466b90c	-prod				
Overview	Job Executions	Accociated Jobs	Engine Pool	Nount Points Connector	r Configurations	Access	
Search						Search (All)	~
Status	Job Name	Start Time	End Time 个	Duration	Rows Masked		
Granning	the-big-job	Aug 21, 2023 12:40	-	18 days 7 hrs 31 mins	201	View	>
Completed	the-job	Aug 8, 2023 2:43 A	Aug 8, 2023 2:48 A	4 mins 51 secs	2	View	>
Failed	the-big-job	Aug 18, 2023 1:28 A	Aug 18, 2023 1:29 A	52 secs		View	>
Failed	the-big-job	Aug 18, 2023 1:53 A	Aug 18, 2023 7:35 A	5 hrs 41 mins 56 secs	1999	View	>

### 9.3.3 Hyperscale jobs

A view of all Hyperscale jobs discovered on a Hyperscale Orchestrator can be found under the **Associated Jobs** tab.

	VER Hyperscale O	rchestrators > hypersc	ale-prod			
Hyperscale Orchestrators	hypersca ID: b5d7299c-a8b	1-468c-ba94-9c88e466b90c				
Overview	Job Executions	Accociated Jobs	Engine Pool	Mount Points 0	Connector Configurations	Access
Search						Search (All)
Last Run Status	Name		Last Completed	Tags		
Granning	the-big-job		None	Add Tags	> View	>
Completed	the-job		Aug 8, 2023 2:48 AM PDT	Add Tags	> View	>

Javascriptivoid(0) The **View** link will take you to the **Compliance Jobs** details page where more information about the job can be found.

CONT TOWE		Data	Compliance	Insights	Admin		e
Compliance Jobs	Compliance Jobs the-big-job b5d7299c-a8b1-468c-b History		90c-2				
In Progress Started at 12:40 AM 31%						Run Time: 18 days 7 hrs View Jo	39 mins <b>Progress:</b> 31%
Details			Hypersca	ale Data Se	et Details	Tags	Edit
Type Hyperscale Description Job created by Hypers Data Retention Settir No	, i i i i i i i i i i i i i i i i i i i		Mount Poir test_mount	ıt		No	tags added

Hyperscale jobs are not separate entities in DCT, but rather are combined with standard Compliance jobs. Hence, this Hyperscale job details page can be navigated to from Compliance
 -> Compliance Jobs. There is a type attribute (Hyperscale or standard) which helps differentiate between the different types.

Configuration and dataset details can be edited directly in the job's Overview page.

•	CONT TOWE	ROL Home R	Data <u>Compliance</u> Insi	ights Admin		<b>#</b>	9
		Compliance Jo	Update Configuration	I			
	< Compliance Jobs	the-big-jc	Enter helpful description			Actions	-
			Job created by Hyperscale Ma	asking			
	Overview	History			h		
			Retain Execution Files				
	In Progress		◯ Always			: 12 hrs 17 mins Progress: 31%	
	Started on Aug 21, 2	2023 12:40 AM P	Never				
	31%		On Errors				
			Offerfors			View Job Execution Details >	
ſ	Details					Edit	t
	Details				Cancel Update		
	<b>Type</b> Hyperscale		Mount Po test_mour			No tags added	
	Description		test_mou	in .			
	Job created by Hypers	scale Masking					
	Data Retention Settin	ng					
	Max Memory 1.00KB						
	Min Memory 0.00B						
	Max Concurrent Sou 30	rce Connections					
	Max Concurrent Targ	jet Connections					
	Hyperscale Orchestra hps-oracle	ator					

### 9.3.4 Hyperscale job engine selection

The Engine Selection tab allows you to manage the compliance engines that the job can use for masking. The table will list **all** compliance engines that are part of the Hyperscale Orchestrator's engine pool. Each compliance engine will either be Selected or Not Selected for the job. The state of each engine is indicated by the Selection column and can be changed via the Actions menu.

C	compliance Jobs >					
Back						Actions
с	4d0f077-9a90-41d9-91bb-e08f44aa84	3d				
Overview	History Table Config	guration Engine Selection	Access			
Search						Search (All) ~
Selection	Name	Туре	Host		Tags	
$\checkmark$	masking2	Masking 18.0.0.0		delphix.com	Add Tags >	Actions :
$\bigotimes$	masking3	Masking 6.0.16.0		delphix.com	Add Tags >	Actions :
	masking			<u>.co</u>	Add Tags >	Select

### 9.3.5 Hyperscale job table configuration

The Table Configuration tab contains the early stages of inventory management. You can see the Hyperscale dataset tables and their settings in the screenshot below. The left side shows the list of tables and allows you to search and paginate through the results.

DATA CONTROL Home Data Con TOWER	pliance Insights Admin	@ <b>9</b>
Compliance Jobs > the-big-job the-big-job 7162dfb9-bie7-4ba0-8e93-cc8f11c2a657-2		Actions -
Overview History Table Config	Access	
Tables	TEST_1 Settings	🗡 Edit
Search	Filter Key	
	Column Array Rows Unload Split	
TEST_1	1	
TEST_10	Stream Size (Bytes) 65536	
TEST_100		
TEST_1000		
TEST_1001		
TEST_1002		
Items per page: 25 🔹 1 – 25 of 1999 < 🗲		

The right side shows you the settings and allows you to make changes via the Edit action.

CONTROL Home Data Compliance Insight	ts Admin 🔅 🔂
Compliance Jobs > new-big Update Co	nfiguration
2b83a91e-95ac-4213-bb6f-c4eaf2c Filter Key	
Overview History Table Co	
Tables Column Array Rows	÷
Search	
- Stream Size (Bytes) -	
TEST_1 65536	
TEST_10	
TEST_100	Cancel Update
TEST_1000	
TEST_1001	
TEST_1002	
TEST_1003	

## 9.3.6 Executing Hyperscale jobs

A Hyperscale job can be executed via the Actions menu.

CONT TOWE		pliance Insights Admin		• <b>9</b>
< Compliance Jobs	Compliance Jobs > job_4 job_4 380b1797-89a0-4d75-a1b4-607935a31997-5			Actions -
Overview	History Table Configu	ration Access		▶ Run
Details	🖍 Edit	Hyperscale Data Set Details 💉 Edit	Tags	Edit
<b>Type</b> Hyperscale		Mount Point test_mount	No tags added	
Description Job created by Hyper	rscale Masking			
Data Retention Setti No	ing			
Max Memory 1.00KB				
Min Memory 0.00B				
Max Concurrent Sou 30	urce Connections			
Max Concurrent Tar 30	-			
Once a job has	s started, a progress b	oar with details will appear in the Ove	erview page.	

DATA CONTROL TOWER	Home Data <u>Com</u>	pliance Insights Admin			¢
Compliance Jobs the-b	nce Jobs > the-big-job ig-job 3267-4ba0-8e93-cc8f11c2a657-2				Actions
Overview Histo	ry Table Configu	ration Access			
In Progress Started on Aug 21, 2023 12:40	AM PDT			Run Time: 12 hrs	27 mins Progress: 31%
31%				View Jo	ob Execution Details >
Details	🖍 Edit	Hyperscale Data Set Details	✓ Edit	Tags	Ec
<b>īype</b> Iyperscale		Mount Point test_mount		No tag	s added
Description Job created by Hyperscale Mask	ing				
Data Retention Setting No					
Max Memory 1.00KB					
Min Memory 0.00B					

Click the **View Job Execution Details** link to go to the Execution Details page to see job execution progress, as well as an Actions menu to **Stop** or **Re-Run** a job.

Ç	<b>X)</b>	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin					٥	8
<	Overview	Compliance Job the-big-job			Selected Executi	on Details						Actions	
	In Prog Started of	<b>gress</b> on Aug 21, 2023 12:40	AM PDT								Run Time: 12 hrs 27 mins	<ul><li>Stop</li></ul>	Stop
	F	Step 0 - Unload Run Time: 2 mins 9 se	cs Com	pleted Ro	ows: 1442				10	0%			
	F	Step 1 - Masking Run Time: 12 hrs 27 m Step 2 - Load Run Time: 12 hrs 25 m		-	lows: 201 lows: 201					1% 🔵			
	s	Step 3 - Post Load											

Details of a failed job will also be displayed in the Execution Details page. If the job was configured to retain execution data, the Clean option in the **Actions** menu can be used to discard this data.

Q	0	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin							٥	0
< 1	Back	Compliance the-bi	g-job		> History > S	elected Execu	ition Details							Action	IS <b>•</b>
	<b>Fail</b> Starte	<b>ed</b> ed on Aug 21, 202	23 12:22 AN	1 PDT								Run Time: :	5 Re-Run O Stop	Evecution	Data
	Step 0 - Unload Run Time: 2 mins 55 secs Completed Rows: 1442					100%			Execution	Clean u					
	-0	Step 1 - Maski Run Time: 3 da BLACKBOX.TE properly config View All 451 E	ays 4 hrs 36 ST_265 Un gured.	omins C able to re	Completed Rov solve address	vs: 451 of Engine: eya	al-masking. N	Make sure th	he hostname is	correct and DNS	23%				
		Step 2 - Load													
		Step 3 - Post L	_oad												

### 9.3.7 Creating Hyperscale jobs

New Hyperscale jobs can be created via DCT when you have a database compliance job setup on a Compliance Engine and need to use the same masking inventory in a Hyperscale job. DCT will export the masking job details from the Compliance Engine and import them into the Hyperscale Orchestrator. The result is a new set of Hyperscale connectors, a dataset, and a Hyperscale job.

Hyperscale job creation is currently only supported on Hyperscale Orchestrators of type ORACLE and MSSQL.

The **+ Hyperscale Job** button in the Actions menu will initiate a wizard that walks you through the creation process.

CONTRC TOWER	L Home Data C	ompliance Insights	Admin			• 8
Compliance Engines	Compliance Jobs	3				Actions -
Hyperscale	Compliance jobs are the o	configurations that enable	e you to mask data on y	our data sources.		+ Hyperscale Job
Orchestrators	Search					Search (All) V
Compliance Jobs						
	Last Run Status	Name	Туре	Last Completed E	Tags	
		dal-copy-sanity	Standard		Add Tags >	View >
		mask_U6TY3V9H	Standard		Add Tags >	View >
		mask_MSCGYR43	Standard		Add Tags >	View >

After setting the new job name, description, and tags, the wizard will prompt you to select a **source** compliance job. This compliance job must be the source job on your compliance engine whose inventory you

want to import. You must then explicitly select a Hyperscale Orchestrator to create the job on, along with the
MountPoint to use. Finally, set any and all configuration settings that are relevant to the job you want to
create.

Details	Configuration			
<ul> <li>Configuration</li> </ul>	mask_V0203V31	Select		
Summary	Source Credentials	Target Credentials		
	delphix.com		delphix.com	
	Source Username	- Target Username		
	USER1	USER2		
	Source Password	- Target Password		
	em-hyperscale	Select		
	Select Mount Point Infrastructure			
	teschount	Select		
	- Default Stream Size (Bytes)			
	6556			
	The stream size to be used by the sqlldr Oracle ut size (in bytes) of the data stream sent from the c			
	Default Unload Split			
	2			
	The number of unloaded files to be generated fro	m the source database.		
	Retain Execution Files			
	Always			
	Never			
	On Error			
	Advanced Configuration			~

By default, DCT will create the Hyperscale job using all available Compliance Engines in the orchestrator's pool. If changing this selection is required, it can be done after job creation in the Engine Selection tab of the job's details page.

Currently DCT does not validate or enforce required input parameters. The requirements to create a Hyperscale job will differ depending on the Hyperscale Orchestrator version and database type.

As a reminder, the import process will not include any secure credentials for connectors. You have the option to set the connector credentials up front when creating the job (see screenshot above). Otherwise, you must independently find the imported connectors and explicitly set the credentials after the job has been created.

If your source compliance job is using any global objects such as Algorithms, those global objects must be pre-synced to all engines in the orchestrator's engine pool. This can be done via the **Manually Deploy Job Dependencies** option in the Hyperscale Orchestrator's **Action** menu.

CONTROL Home Data Completion	ance Insights Admin		<b>• •</b>
Hyperscale Orchestrators     hyperscale       Back     hyperscale       ID: c44fa828-4fcb-4258-8a58-4f91285eb150       Overview     Job Executions		Connector Configurations Access	Actions - Rename Manually Deploy Job Dependencies Manually 1
Number of Jobs 10		Running Job new-big	
Details	🖍 Edit	Tags	🖍 Edit
Created: Jan 17, 2024 8:15 AM PST Data Type Oracle		No tags addeo	i

The wizard will walk you through the necessary steps which includes selecting the source compliance engine along with one or more target engines.

Select Source Engine		Source Engine	a tha ich danandan -!		mlau			
Select Compatible Target Engines	i	Information	is the job dependencies yo jects like masking plugins		proy.	e target eng	ines.	
Summary	Search						Search (All)	~
		Name	Engine Version	≡	Host Name	Tags		
		eyal-masking			eyal-masking2.dlpxdc.co	Add Ta	ags >	
		em-masking2	18.0.0.0		em-masking2.dcol2.delphix	Add Ta	ags >	
		em-masking3	6.0.16.0		em-masking3.dcol2.delphix	Add Ta	ags >	
		UI Masking	20.0.0.0		ui-masking.dcol2.delphix.com	Add Ta	ags >	
					1 to 4 of 4	4 <	Page 1 of 1	>

Please refer to the <u>Hyperscale product documentation</u><sup>130</sup> for the Hyperscale Orchestrator version you are running to learn all about the specifics of creating jobs in Hyperscale.

<sup>130</sup> https://documentation.delphix.com/docs/hyperscale-compliance

Updates to the original source compliance job can be done anytime after initial import and a re-import can be done via DCT. This will update the Hyperscale job's existing dataset with the refreshed ruleset from the source compliance job.

< Back	Compliance Jobs > test-npe test-npe 6ec967bc-0c79-4377-b18f-06f897858	Actions -				
Overv	view History	Table Configuration	Access			► Run
						Re-import Data Set     Re-import Data Set
Details		🖍 Edit	Hyperscale Data Set Details	🖍 Edit	Tags	🖍 Edit
<b>Type</b> Hyperscal			Mount Point test_mount			No tags added
Descripti Job create	on ed by Hyperscale Masking					
Data Rete No	ention Setting					
Max Men 1.00KB	nory					
Min Mem 0.00B	lory					

Note that this action will keep existing table configurations intact and the initial default settings for **unload split** and **stream size** will apply only to new tables. These settings can be changed for any table afterwards in the job's **Table Configuration** details.

### 9.3.8 Hyperscale Compliance Engines

A view of all Compliance Engines registered with a Hyperscale Orchestrator can be found under the **Engine Pool** tab.

$\infty$	DATA CONTROL TOWER	Home	Data C	ompliance	Insights	Admin					θ
< Hypersca Orchestra	le ators	hypersc	Orchestrators ale-dev 387-4367-8876-9e		le-dev						
Overvi	ew Job	Executions	Accociate	ed Jobs	Engine Po	ol	Mount Points	Connector Confi	gurations	Access	
Search										Search (All)	~
Status		Name		Туре			Host	Tags			
Active		em-masking		Continuou 15.0.0.0	s Compliance		em-masking.dcol2.delphix.	Add Tags	>	Actions :	

1 to 1 of 1 < Page 1 of 1 >

When DCT discovers the engines registered with a Hyperscale Orchestrator, it will create DCT RegisteredEngine entities out of them (if they do not already exist in DCT, as uniquely identified by the hostname). The result is a unified model where DCT RegisteredEngine objects are what make up the **engine pool** in a Hyperscale Orchestrator. The same engines will appear under the **Compliance** -> **Compliance Engines** page.

Engine credentials will not be retrieved from the Hyperscale Orchestrator, so the created engines must be updated with credentials, along with any relevant security settings. The discovered engines will remain in the OFFLINE status until updated.

CONTROL TOWER	- Home Data Co	ompliance Insights	Admin					
Compliance Engines	Compliance Engir	nes				Conne	ct Engin	ne
Hyperscale Orchestrators	Overview of all compliance	engines in your Delphix ea	cosystem.					
Compliance Jobs	Search					Search (	AII) ,	~
					_			
	Status Name/UUID		Masking Usage/Total	Masking Available Cores	Tags			
	Online em-masking	Masking 0 15.0.0.0	0% 2.00GB	2	Add Tags	s > Vi	ew >	
	Offline eyal-masking	Masking 15.0.0.0			Add Tags	s > Vi	ew >	

The created DCT engine entities are permanent, in the sense that even if the origin Hyperscale Orchestrator is unregistered, the engines in DCT remain as if they had been registered independently of Hyperscale.

Adding new engines to the engine pool can be done by clicking the **+ Engine** button. Only Compliance Engines that have already been registered with DCT can be added to a Hyperscale Orchestrator's engine pool:

				Search (All) V				
Status Status Active Active		Name 🗮	Туре	Host				
		eyal-masking-3.dlpxd	Continuous Compliance 17.0.0.0	eyal-masking-3.dlpxd				
		masking-engine-2	Continuous Compliance 17.0.0.0	eyal-masking-2.dlpxd				
	4 Active	eyal-masking5	Continuous Compliance 18.0.0.0	eyal-masking5.dlpxdc				
	4 Active	demo-masking-engine1	Continuous Compliance 18.0.0.0	demo-masking-engine				
	4 Active	dal-engine-1	Continuous Compliance 18.0.0.0	dal-qa-dev-1120.dlpxd				
	4 Active	dal-engine-2	Continuous Compliance 18.0.0.0	dal-qa-dev-1127.dlpxd				

Note that this operation will, in turn, register the Compliance Engine with the Hyperscale Orchestrator. The Compliance Engine name, credentials, and configuration settings will be set according to DCT's record.

Removing an engine from the engine pool can be initiated with the **Remove** button via the Actions menu:

Overview	Job Executions	Accociated Jobs	Engine Pool	Mount Po	pints	Connector Co	onfigurati	ons	Acces	35			
												ן ו	
Search										Search (All)	~		+ Engine
Status	Name		Туре		Host		Ta	ags					
Inactive	eyal-maski	ng			eyal-masking2	2.dlpxdc.co		Add Tags	<b>&gt;</b>				Actions :
🖌 Active	em-maskin	g4	Unset 18.0.0.0		em-masking4	.dcol2.delphix.com		Add Tags	>				Actions :
												Vie	ЭW
												Î	Remove

This will completely unregister the Compliance Engine from the Hyperscale Orchestrator.

### 9.3.9 Hyperscale mount points

A view of all mount points on a Hyperscale Orchestrator can be found under the **Mount Points** tab.

1 to 3 of 3

< Page 1 of 1 >

CONT CONT TOWE	ROL Home	Data	Compliance	Insights	Admin				<b>@ 8</b>
< Hyperscale Orchestrators	hps-ms	ssql	tors > hps-mss 4-607935a31997	ql					Actions -
Overview	Job Executions	Accoci	iated Jobs	Engine Po	ol	Mount Points	Connector Configurations	Access	
Search								Search (All) V	+ Mount Point
Mount Point Name	н	lost Address		Ту	be		Path		
my-mp1-1	m	np1.delphix.cor	n	NF	S3		/tmp/foo		Actions :
test_mount	e	-nfs.dlpxdc.co		NF	S4		/var/tmp/masking-mount/		Actions :
test_mount_2	e	-nfs3.dlpxdc.co	2	NF	S3		/var/tmp/masking-mount/		Actions :

Creating new mount points can be done via the **+ Mount Point** button.

CONTROL Home TOWER	Data Compliance Insights Admin	<b>@ 0</b>
Hypersca	Add Mount Point	
< Hyperscale Orchestrators ID: 380b1797	Mount Point Name	Actions -
Overview Job Executions		Access
Search	Host Address	rch (All) V + Mount Point
	Path	
Mount Point Name	Туре	
my-mp1-1	OIFS	Actions :
test_mount	O NFS3	Actions :
test_mount_2	O NFS4	Actions :
	Options	
	Cancel Add Mount Point	1 to 3 of 3 < Page 1 of 1 >

This will result in a new mount point being created directly on the Hyperscale Orchestrator.

**Editing** and **Deleting** a mount point can be done for a particular row via the Action menu in the last column of the table.

Hyperscale Orchestrators	hps-mss	Orchestrators > hps-mss sql aa0-4d75-a1b4-607935a31997	ql				Actions
Overview	Job Executions	Accociated Jobs	Engine Pool	Mount Points	Connector Configurations	Access	
earch						Search (All) 🗸	+ Mount Poir
Nount Point Name	Hos	st Address	Туре		Path		
		st Address 1.delphix.com	Type		Path /tmp/foo		Actions :
Mount Point Name my-mp1-1 lest_mount	mp						Actions :

1 to 3 of 3 < Page 1 of 1 >

## 9.3.10 Hyperscale connector configurations

A view of all connectors on a Hyperscale Orchestrator can be found under the **Connector Configurations** tab.

DATA CONTROL Home Da TOWER	ta <u>Compliance</u> Insights Admin			@ <b>8</b>
< Hyperscale hps-mssql	estrators > hps-mssql 75-a1b4-607935a31997			Actions -
Overview Job Executions A	ccociated Jobs Engine Pool Moun	t Points Connector Configurations	Access	
Search			Search (All) V	+ Connector
Connector ID	Source JDBC URL	Target JDBC URL		
380b1797-89a0-4d75-a1b4-607935a31997-1	jdbc:sqlserver://10.110.229.231:49854;database=F	jdbc:sqlserver://10.110.192.63:49854;database=Fe		Actions :
380b1797-89a0-4d75-a1b4-607935a31997-2	jdbc:sqlserver://10.110.229.27:59871;database=S	jdbc:sqlserver://10.110.193.10:59871;database=S		Actions :
380b1797-89a0-4d75-a1b4-607935a31997-3	jdbc:sqlserver://10.110.242.215:59871;database=S	jdbc:sqlserver://10.110.244.26:59871;database=S		Actions :
380b1797-89a0-4d75-a1b4-607935a31997-4	jdbc:sqlserver://10.110.249.67:59871;database=S	jdbc:sqlserver://10.110.238.133:59871;database=S		Actions :
			1 to 4 of 4 <	Page 1 of 1 >

Creating new connectors can be done via the **+ Connector** button.

CONTROL HO	me Data <u>Compliance</u> Insights Admin		<b>e 9</b>
Нур	Add Connector		
< Hyperscale hp. Orchestrators ID: 38	Source Connector	Target Connector	Actions 👻
Overview Job Execut	JDBC Connector	JDBC Connector	ess
Search	Username	Username	(All)
Connector ID	Password	Password	
380b1797-89a0-4d75-a1b4-607935a31997	Connection Properties	Connection Properties	Actions :
380b1797-89a0-4d75-a1b4-607935a31997	+	+	Actions :
380b1797-89a0-4d75-a1b4-607935a31997	There are no items.	There are no items.	Actions :
380b1797-89a0-4d75-a1b4-607935a31997			Actions :
		Cancel Add Connector	to 4 of 4 < Page 1 of 1 >

Editing and Deleting a connector can be done for a particular row via the Actions menu in the last column of the table.

$(\mathbf{x})$	DATA CONTROL TOWER	Home	Data	Compliance	Insights	Admin					¢	θ
< Hyperso Orchest		hps-ms	sql	tors > hps-mssq ⊳4-607935a31997	I						Actions	-
Over	view Job E	xecutions	Accoc	iated Jobs	Engine Po	lool	Mount Points	Connector Configurations	Access			
Search									Search (All)	~	+ Connecto	or
Connector	· ID		So	urce JDBC URL			Target JDBC UF	L				
380b1797-	-89a0-4d75-a1b4-607935	a31997-1	jdb	c:sqlserver://10.110.2	29.231:49854;0	latabase=F	. jdbc:sqlserver://	10.110.192.63:49854;database=Fe			Actions :	
380b1797-	-89a0-4d75-a1b4-607935	a31997-2	jdb	c:sqlserver://10.110.2	29.27:59871;da	atabase=S	jdbc:sqlserver://	10.110.193.10:59871;database=S				
380b1797-	-89a0-4d75-a1b4-607935	a31997-3	jdb	c:sqlserver://10.110.2	42.215:59871;0	latabase=S	jdbc:sqlserver://	10.110.244.26:59871;database=S			Remove	
380b1797-	-89a0-4d75-a1b4-607935	a31997-4	jdb	c:sqlserver://10.110.2	49.67:59871;da	itabase=S	jdbc:sqlserver://	10.110.238.133:59871;database=S			Actions :	
									1 to 4 of	4	< Page 1 of 1 >	

# 10 Integrations

Data Control Tower provides a global integration layer for a connected Delphix ecosystem, whether that is a single or dozens of globally distributed engines, DCT drives a scalable approach to integrating Delphix into any custom script or automation toolchain.

Aside from the comprehensive API layer (see API references (see page 402) for more detail), DCT powers automation through Delphix-built and supported integrations with popular applications such as Terraform, ServiceNow, etc.

To see a current list of Delphix integrations, please visit <u>Delphix Integrations</u><sup>131</sup> for more detail.

<sup>131</sup> http://ecosystem.delphix.com

# 11 DCT concepts

## 11.1 Introduction

Data Control Tower (DCT) provides new and novel approaches to general Delphix workflows, delivering a more streamlined developer experience. This article will introduce these concepts to Delphix and how they work with DCT.

For **VDB Provisioning**, the UI supports these data platforms:

- Oracle Single Instance Single Tenant
- Oracle Single Instance Multi Tenant (for Linked CDB only)
- MSSql Single Instance

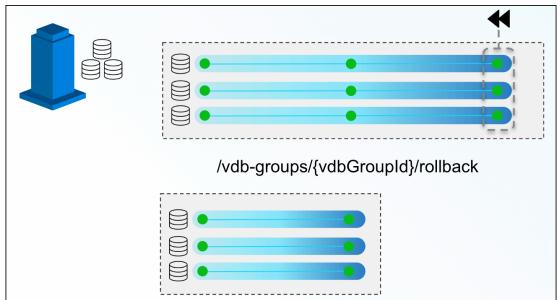
For **Infrastructure Connection Wizard**, only UNIX standalone environments can be added via the UI.

## 11.2 Concepts

### 11.2.1 Virtual Database (VDB) groups

Virtual Database (VDB) groups are a new concept to Delphix, which enable the association of one or more VDBs as a single VDB group. This allows for bulk operations to be performed on the grouped VDBs, such as bookmark, provision, refresh, rewind, and others. This will assist in complex application testing scenarios (e.g. integration and functional testing) that require multiple data sources to properly complete testing.

With VDB groups, developers can now maintain data synchronicity between all grouped VDBs, which is particularly useful for complex timeflow operations. For example, updating VDBs to reflect a series of schema changes across data sources, or to reflect an interesting event in all grouped datasets. In order to maintain synchronicity among grouped datasets, timeflow operations (refresh, rewind, etc.) must use a bookmark reference.



In the above example, a VDB Group reference is created for three VDBs. At the end of the above timeline group, a developer decides to rollback those VDBs to a previous snapshot. By issuing a single command via the VDB groups endpoint, DCT will move all three back, ensuring that they all maintain referential synchronicity.

Bookmarks and VDB groups are loosely related; a VDB group can exist in the absence of any bookmarks, and a bookmark can exist without any VDB group. It is important to note that the bookmark represents data, while the VDB group represents the databases to make this data available.

DCT will automatically stop an operation from executing if one or more objects are incompatible (e.g. provisioning a VDB group into a set of environments, where one of the VDBs is incompatible, such as an Oracle on Linux VDB provisioned onto a Windows environment).

VDB groups based operations will return a single job to monitor the overall status of the series of individual VDB operations. If one of those individual operations is unable to complete, DCT will report a "fail", but any individual operations that are able to successfully complete will still do so.

### **11.2.2 Comparing Self-Service containers to VDB groups**

As mentioned above, VDB groups are a crucial DCT concept that enable Self-Service functionality outside of the Self-Service application. Consider VDB groups acting similarly to Self-Service containers, in that it provides grouping and synchronization among VDBs, but VDB groups can provide a more flexible approach for users. Here are some additional points for example:

- The same VDB can be included in multiple VDB groups
- Including a VDB in a VDB group does not prevent operations on the VDB individually
- VDBs can be added to or removed from VDB groups
- VDB groups do not have their own timeline

### 11.2.3 Bookmarks

DCT Bookmarks are a new concept that represents a human-readable snapshot reference that is maintained within DCT. This is not to be confused with Self-Service bookmarks, maintained separately within the Self-Service application. With DCT Bookmarks, developers can now reference meaningful data (e.g. capturing a schema version reference to pair with an associated code version, capturing test failure data so that developers can reproduce the error in a developer environment, etc.) and use those references for any number of use-cases (e.g. versioning data as code, quickly provisioning a break/fix environment with relevant data, etc.). DCT Bookmarks are compatible with both VDBs and VDB groups, and can be used as a reference for common timeflow operations such as:

- Provisioning a VDB or VDB group from a bookmark
- Refreshing a VDB or VDB group to a bookmark
- Rewinding a VDB or VDB group to a bookmark

DCT Bookmarks have associated retention policies, the default value is 30 days, but policies can be customized anywhere from a day to an infinite amount of time. Once the Bookmark expires, DCT will delete the bookmark.

Bookmarks are compatible with individual VDBs and VDB groups. Bookmark Sharing is only available for engines on version 6.0.13 and above.

DCT Bookmarks, when created, initiate a snapshot operation on each and every VDB in order to maintain synchronicity between each VDB. In that same vein, bookmark-based VDB group operations will have each VDB-specific sub-process run in parallel (as opposed to sequentially) to reduce drift between grouped VDBs.

### 11.2.4 Jobs

=

Jobs in DCT are the primary means of providing operation feedback (PENDING, STARTED, TIMEDOUT, RUNNING, CANCELED, FAILED, SUSPENDED, WAITING, COMPLETED, ABANDONED) for top-level operations that are run on DCT. Top-level operations represent the parent operation that may have one or more childbased jobs (e.g. refreshing a VDB group is the parent job to all of the individual refresh jobs for the grouped VDBs under the VDB group reference).

Top-level jobs will report a "FAILED" status if one or more child jobs fail. For child jobs that can complete, DCT will continue to complete those jobs even if a parent job reports a failure.

### 11.2.5 Tags

DCT Tags enable a new business metadata layer for users and consumers to filter, sort, and identify common Delphix objects, to power any number of business-driven workflows. A tag is comprised of a (Key:Value) pair that associates business-level data (e.g. location, application, owner, etc.) with supported objects. DCT 2.0 and above support the following Tags:

- Continuous Data Engines
- Environments
- dSources
- VDBs

Developers and administrators add and remove tags using tag-specific object endpoints (e.g. /vdbs/

vdbId/tags) and can leverage tags as search criteria when using the object-specific search endpoints (e.g. using filtering language to narrow results).

Some sample tag-based use-cases include:

- Refreshing all the VDBs owned by a specific App Team using an "Application: Payment Processing" tag. This would be accomplished by querying "what VDBs have the (Application: Payment Processing) tag" and feeding those VDB IDs into the refresh endpoint.
- Driving accountability for VDB ownership by tagging primary and secondary owners for each VDB (e.g. (primary\_owner: John Smith), (secondary\_owner: Jane Brown)). That way, if a VDB is overdue for a refresh, tracking down an owner is a simple tag query.
- Tags are registered as an attribute that is specific to an object as opposed to a central tagging service. As a result, tag-based querying can only be done on a per-object type basis.

A supported object can contain any number of tags.

### 11.2.6 Tag-based filtering

All taggable objects support tag-based filtering for API queries that adhere to the search standards documented in API References (see page 402). A few examples of how tag-based filtering can be used are as follows:

List all VDBs of type 'Oracle', of which IP address contains the '10.1.100' string and which have been tagged with the 'team' tag, 'app-dev-1'.

```
database_type EQ 'Oracle' AND ip_address CONTAINS '10.1.100' and tags CONTAINS { key
EQ 'team' AND value EQ 'app-dev-1'}
```

## 11.3 Nuances

### 11.3.1 Stateful APIs

All applicable DCT APIs are stateful so that running complex queries against a large Delphix deployment can be done rapidly and efficiently. DCT accomplishes this by periodically gathering and hosting telemetry-based Delphix metadata from each engine.

### 11.3.2 Local data availability

DCT currently relies on existing Continuous Data and Compliance constructs around data-environmentengine relationships. This means that DCT operations require VDBs to live on the engine where the parent dSource lives and so on.

### 11.3.3 Engine-to-DCT API mapping

Wherever possible, DCT has looked to provide an easier-to-consume developer experience. This means that in some cases, an API on DCT could have an identical API on an engine. However, there are many instances of providing a higher level abstraction for ease of consumption; one example is the data inventory APIs on DCT (sources, dSources, VDBs), which are a simplified representation of data represented by the source, sourceconfig, and repository endpoints on the local engine (source, dSource, and VDB detail are all combined under those three endpoints).

### 11.3.4 Local references to global UUIDs

In order to avoid collision of identically-named and referenced objects, DCT generates Universally Unique IDentifiers (UUID) for all objects. For existing objects on engines like dSources and VDBs, DCT will concatenate the local engine reference with the engine UUID (e.g. 'Oracle-1' on engine '3cec810a-ee0f-11ec-8ea0-0242ac120002' will be represented as 'Oracle-1-3cec810a-ee0f-11ec-8ea0-0242ac120002' on DCT).

### 11.3.5 Environment representations

Environments within Delphix serve as a reference for the combination of a host and instance. This is coupled with the fact that environments can be leveraged by multiple engines at the same time and that engines often have a specific context to some of the elements that comprise an environment. For example, an environment could have both an Oracle and ASE instance installed and that Engine A leverages an Oracle-based workflow and Engine B leverages an ASE workflow. DCT will create two identifiers to represent the specific host and instance combinations. Thus, in DCT, Engine A will be connected to a different uniquely identified Environment than Engine B.

As mentioned earlier with Engine-to-DCT API mapping, DCT aims to simplify the user experience with Delphix APIs by combining different Continuous Data endpoints into a simplified DCT API. The Environment API does this by combining environment, repository, and host endpoints so that writing queries against Delphix data is

a much simpler process. One example would be identifying all environments that have a compatible Oracle home for provisioning:

```
repositories CONTAINS { database_type EQ 'Oracle' and allow_provisioning EQ true AND
version CONTAINS '19.2.3'}
```

### 11.3.6 Supported data sources/configurations

DCT is compatible with all Delphix-supported data sources and configurations.

### 11.3.7 Process feedback

Whenever a DCT request completes, it will return a JOB ID as its response. This Job ID can be used in conjunction with the jobs endpoint to query the operation status.

# 12 DCT Toolkit

## 12.1 Introduction

DCT Toolkit (dct-toolkit) is the command line application specifically designed to interact with a particular DCT instance. It aims to simplify and ease out interacting with DCT instances while making the process intuitive, with minimal configuration and setup. dct-toolkit abstracts all of the API level implementation complexities and provides a user friendly LINUX-like interface, which can be run from any terminal.

## 12.2 Compatibility

dct-toolkit is designed to be compatible with any DCT product version, but is fully supported from DCT version 8.0.0 onwards. While dct-toolkit can be used in testing or development environments against any DCT versions, Delphix highly recommends at least DCT version 8.0.0 for using it in the production environment. Some of the value added features are only supported from DCT 8.0.0 version onwards.

dct-toolkit does not need to be upgraded with every new version of DCT. All of the new APIs that are part of the newer DCT releases will automatically be available in dct-toolkit. This is possible because dct-toolkit reads the api specification from the DCT instance (configurable) it is configured to connect to and dynamically generates the list of commands and their respective options.

## 12.3 New features

### 12.3.1 Version 1.4.0

#### • Enhanced search experience

Users can now employ the search command with a more straightforward syntax, in addition to the existing option for filter\_expression use. This command structure will search for VDBs that have a name matching <vdb\_name> and database type matching <database\_type> :

./dct-toolkit search\_vdb name "<vdb\_name>" database\_type <database\_type>

The name flag allows users to specify the VDB name, while the database\_type flag lets them
indicate the database type. This command structure aims to improve efficiency and ease of
use for the search functionality within dct-toolkit.

Simplify syntax for value array input

Users can now provide array values using more natural and versatile formats, such as commaseparated values or repeated options. Additionally, to handle cases where a comma needs to be included within a value, users can escape the comma using a ("). Here are the updated examples:

#### Comma-separated values

This format allows users to list multiple values for vdb\_ids in a straightforward, commaseparated manner.

vdb\_ids=VCDO\_ZKJ,ABCD\_JHI

#### Repeated options

Users can now repeat the vdb\_ids option to specify multiple values individually, providing a clear and concise representation.

vdb\_ids=ABCD\_JHI vdb\_ids=XYZ\_ABC

• Escaping Commas Inside Values:

vdb\_ids=VCD0\_ZKJ,\"AB,CD\_JHI\"

The Simplify syntax for value array input feature in dct-toolkit is not backward compatible with previous versions. As a result, users are unable to use the older method of providing values in string format to array input, as exemplified below:

vdb\_ids='["VCD0\_ZKJ", "ABCD\_JHI"]'

This is true for all options where the type is array of value.

### 12.3.2 Version 1.2.0

• --json/-js option

dct-toolkit now supports a --json/-js option for all of the commands. If this option is specified, all properties from the DCT response are printed in JSON format. This option is mutually exclusive with the --all-columns/-A and --columns/-c options but can be used along with the -jsonpath/-jp and --expand/-ex options.

--csv/-cs option

dct-toolkit now supports a -csv/-cs option for all of the commands. If this option is specified, all properties from the DCT response are printed in CSV format. This option can be used along with the -columns/-c option only to output particular properties from the DCT response. This option can also be specified along with the -jsonpath/-jp and -expand/-ex options.

• This option is only applicable to list API responses where the response is printed in table format by default. For all other APIs that return a single object, this option is ignored.

#### • create\_config and encrypt\_api\_key commands are now interactive

While providing apiKey value in create\_config and encrypt\_api\_key command, there is a risk that plaintext apiKey can leak via shell history. To protect against this, both of these commands are now made interactive. Providing an apiKey interactively does not leak it via shell history. Following examples demonstrates providing apiKey interactively. Once following commands are executed,

dct-toolkit will ask and wait for the apiKey to be provided by the user before executing the command. The DCT instance URL must contain the protocol and suffix. For example, dct.company.co should be https://dct.company.co/dct/.

```
./dct-toolkit encrypt_api_key dctUrl=<DCT instance URL> apiKey
```

```
./dct-toolkit create_config dctUrl=<DCT instance URL> apiKey
```

## 12.4 Installation and setup

#### 12.4.1 Installation

dct-toolkit is currently supported on Linux, Windows, and macOS platforms. There are no special system requirements for running it.

To install dct-toolkit, download the executable binaries from the Delphix download site<sup>132</sup> and extract it to the machine from which it will run. Once the executable binary is extracted, grant the execute permission to the binary file.

On Linux and macOS this can be done from Terminal with the following command:

```
chmod 777 ./dct-toolkit
```

For Windows this can be done from cmd with the following command:

```
CACLS files /e /p <username>:F
```

Where <username> is the user to whom the permission must be granted and F is the **Full Control** permission that needs to be granted.

The binary is not currently verified for macOS and will give a warning that the binary is untrusted. To get around this issue, you will need to open the binary and explicitly whitelist it. One easy way to achieve this is by pressing the ctrl key and clicking on the binary file, then select Open. On the resulting warning message box, select Open. Now the binary is allowed to be executed from the terminal.

132 https://download.delphix.com/folder

### 12.4.2 Setup

A plain text configuration file is needed to get started. The recommended way to create this configuration file is via the create\_config command, available in dct-toolkit.

Please note that **HTTPS** must be specified for the DCT instance URL for DCT engines when added to dct-toolkit configurations.

For creating a typical configuration with only the required properties, use the following command:

```
dct-toolkit create_config dctUrl=<URL of DCT instance> apiKey=<api key value>
```

This will create the configuration file in the default location under the user's home directory. The full path for the configuration file will be <users home directory>/.dct-toolkit/dct-toolkit.properties.

The create\_config command takes in the options mentioned below:

Option name	Required/optional	Description
dctUrl	Required	HTTP/S URL of the DCT instance.
аріКеу	Required	API key of the account used to connect to the DCT instance pointed by the dctUrl option.
configFileOutputLocati on	Optional	Fully qualified path of the properties file. If this option is not specified, the properties file will be created in the .dct-toolkit folder under the user's home directory. If this option is specified, the DCT_TOOLKIT_CONFIG_FILE environment variable needs to be exported to point to the config file, in order for the config file to be effective.
apiVersion	Optional	API version to be used for DCT APIs. If this is not set, the latest API version from the DCT instance will be used.

apiYamlLocation	Optional	Location of the local api.yaml file. If this is not set, the latest api.yaml file will be downloaded from the DCT instance that is configured.
insecureSSL	Optional	Whether to use insecure SSL connection to the DCT instance. By default, this will be set to false.
unsafeHostnameCheck	Optional	Whether to disable hostname verifier checks for SSL connection to the DCT instance. By default, this will be set to false.
sslCertificate	Optional	PEM format SSL certificate path to be used for SSL connection to DCT instance.
logLevel	Optional	Log level to set. Can be one of OFF, ERROR, WARN, INFO, DEBUG, TRACE, ALL. By default, the log level will be INFO.
logDir	Optional	Directory where the logs should be written. By default, logs will be written to the logs directory created under the .dct-toolkit folder in the user's home directory.

All of these options and help can be requested with the following command:

#### ./dct-toolkit create\_config -h

All of the above properties can also be individually specified using environment variables. Environment variable mappings for each of the above properties are as follows:

Property name	Environment variable name
dctUrl	DCT_TOOLKIT_DCT_URL
аріКеу	DCT_TOOLKIT_API_KEY
apiVersion	DCT_TOOLKIT_API_VERSION

apiYamlLocation	DCT_TOOLKIT_API_YAML_LOCATION
insecureSSL	DCT_TOOLKIT_SSL_INSECURE
unsafeHostnameCheck	DCT_TOOLKIT_SSL_UNSAFE_HOSTNAME_CHECK
sslCertificate	DCT_TOOLKIT_SSL_CERT
logLevel	DCT_TOOLKIT_LOG_LEVEL
logDir	DCT_TOOLKIT_LOG_DIR

Configuring non-sensitive properties in a properties file and sensitive properties (like apiKey) via an environment variable is acceptable. Properties set via environment variable will take precedence over the ones specified in the properties file.

Once the required properties are available via either the properties file or the environment variable, dct-toolkit is ready for use.

## 12.5 Usage guide

All of the DCT APIs are available as commands in dct-toolkit. To find the list of all commands which are available, use the following command:

./dct-toolkit -h

This will print the list of all commands grouped by the appropriate entity names.

### 12.5.1 Examples

• The list of available options for a particular command can be requested with the following command:

```
./dct-toolkit <command_name> -h
```

 There are currently many options for provisioning a VDB, some options are only valid for a particular DB type. For example, the unique\_name option is only applicable to Oracle DBs. For better ease of use, dct-toolkit has subcommands created under the provisioning command, with options that are relevant to that particular subcommand. For example, these are the subcommands under the provision\_vdb\_by\_snapshot command: oracle sybase mssql appdata postgres

For provisioning an Oracle VDB, use the following command:

dct-toolkit provision\_vdb\_by\_snapshot oracle source\_data\_id=<dsourceId> -auto\_select\_repository unique\_name=<uniqueName>

For provisioning a Sybase-ASE VDB, use the following command:

```
dct-toolkit provision_vdb_by_snapshot sybase source_data_id=<dsourceId> --
auto_select_repository --truncate_log_on_checkpoint
```

• For getting the list of registered engines, use the following command:

dct-toolkit get\_registered\_engines

The above command will only print important fields in the response. For printing all of the fields in the response, use the following command:

-A/--all-columns

```
dct-toolkit get_registered_engines -A
```

To list only the selected columns that are useful to the user, use the following command:

--columns/-c

dct-toolkit get\_registered\_engines --columns=id,name,cpu\_core\_count...

For advanced use cases, dct-toolkit also provides an option to specify a jsonpath<sup>133</sup> expression to extract required objects from the JSON response. This can be requested with the following command:

--jsonpath/-jp

<sup>133</sup> https://github.com/json-path/JsonPath

dct-toolkit get\_registered\_engines --jsonpath=<json path expression starting
with \$>

Note, these options are available for all of the commands available in dct-toolkit.

For commands that use a request body, dct-toolkit provides -body, which can be used to specify a
JSON body (instead of using individual options).

```
dct-toolkit token_info --body=<JSON body to POST to DCT>
```

Help regarding the exact structure of JSON request and response body can be requested for all of the commands with the following command:

-jh/--jsonhelp

```
dct-toolkit token_info -jh
```

dct-toolkit provides an easy to use and understand format for specifying tags. For example, the following command adds two tags - {key=purpose, value=testing} and {key=key1, value=value1}:

```
dct-toolkit create_environment_tags environmentId=<envId> tags purpose=testing
key1=value1
```

- Some of the DCT APIs trigger an asynchronous job and return a jobId in response. dct-toolkit, by default, will wait for the asynchronous job to be completed and will report the end state of the job.
  - There is an option to **not** wait for the completion of an asynchronous job. Use the following command with the --no-wait option:

dct-toolkit refresh\_environment environmentId=<envId> --no-wait

• If the user intends on specifying the API key via an environment variable, dct-toolkit provides a command to get the encrypted version of the API key.

dct-toolkit encrypt\_api\_key apiKey=<DCT api key> dctUrl=<DCT instance URL>

### 12.5.1.1 --json/-js and --csv/-cs option examples

 For the --json/-js option, to print the DCT response as it is received from DCT instance users can use following command:

```
dct-toolkit get_environments --json
dct-toolkit get_environment_by_id environmentId=<environment Id> --json
```

 To print the repositories object from environment object in JSON format users can use following command:

```
dct-toolkit get_environments --json --expand=repositories
```

 For the --csv/-cs option, to print the DCT response in CSV format users can use the following command:

```
dct-toolkit get_environments --csv
```

 To print the repositories object from the environment object in CSV format users can use the following command:

```
dct-toolkit get_environments --csv --expand=repositories
```

#### 12.5.2 Object IDs and names

Object IDs in DCT are opaque Strings which are globally unique and thus unambiguously represent exactly one object in the system. However, since Object IDs are often not known ahead of time (and not friendly to remember or work with), *dct-toolkit* will accept an object name wherever an object id is expected in any of the command parameters, as long as the object name is globally unique. For example, the following dct-toolkit commands are equivalent if AppFS\_DEV is the name corresponding to the VDB with id

MSSQL\_DB\_CONTAINER-10 and is globally unique.

```
dct-toolkit get_vdb_by_id vdb_id="2-MSSQL_DB_CONTAINER-10"
dct-toolkit get_vdb_by_id vdb_id="AppFS_DEV"
```

However, if the object name is not unique, in this example if 2 or more VDBs have the same name, using the VDB name would fail:

```
dct-toolkit get_vdb_by_id vdb_id="AppFS_DEV"
Multiple objects match the provided ID.
```

The solution would then be to search for the VDBs with that name and identify the ID of the VDB:

```
dct-toolkit search_vdbs name=AppFS_DEV -c
id,database_type,name,engine_name,group_name
          id
                       | database_type | name
                                                  engine_name
                                                                      group_name
          _____
                                         _____
 2-MSSQL_DB_CONTAINER-10
                               MSSql | AppFS_DEV | dev-engine-1
                                                                      dev-group
          3-MSSQL_DB_CONTAINER-127
                              MSSql | AppFS_DEV | dev-engine-2
                                                                      qa-group
         ___
response_metadata:
 total: 2
```

Here is another example where names are used instead of IDs for multiple parameters:

```
dct-toolkit provision_vdb_by_snapshot appdata source_data_id="AppFS_MASK" name="AppFS
_DEV" environment_id="Postgres_Target" environment_user_id="delphix" --
auto_select_repository target_group_id='DEV' mount_point="/mnt/provision/AppFS_DEV"
```

Note that object names in DCT are case sensitive, meaning that AppFS\_DEV is not equivalent to appfs\_dev.

## 12.6 Auto-completion support

To enhance your experience with dct-toolkit, an auto-completion feature is implemented to streamline command entry. This functionality facilitates the auto-completion of commands and options with a simple press of the Tab key.

To enable this feature, first generate the auto-completion script by executing the following command:

dct-toolkit generate\_completion >> dct\_toolkit\_auto\_completion\_script

For immediate use in your current shell session, activate the script with the following command:

source dct\_toolkit\_auto\_completion\_script

Alternatively, for a swift activation within the same session, the following command can be utilized:

```
source <(dct-toolkit generate_completion)</pre>
```

Please note that these methods only apply the auto-completion feature for the duration of the current shell session. For a more permanent solution that ensures auto-completion is available in all future sessions, you must append a command to your shell's configuration file ( ~/.bashrc for Bash or ~/.zshrc for Zsh). Use one of the following commands for Bash or Zsh, respectively.:

• For Bash:

echo "source <(dct-toolkit generate\_completion)" >> ~/.bashrc

• For Zsh:

R

echo "source <(dct-toolkit generate\_completion)" >> ~/.zshrc

Please be aware that the dct-toolkit auto-completion feature is currently supported only on Bash-type shells.

## 12.7 API key encryption

#### 12.7.1 Overview

**dct-toolkit** currently authenticates HTTP requests with an API key. The API key can be configured in plain text or specified via an environment variable.

#### 12.7.2 Implementation

Starting from 1.2.0 version, dct-toolkit supports encrypting an API key via a separate command and also via the create\_config command used to generate the configuration file. The create\_config command now stores the API key in encrypted format using the AES/GCM algorithm, where the key and IV are generated from the following two inputs:

- 1. Local hostname of the machine from where the dct-toolkit command is run.
- 2. DCT URL used to connect to the DCT instance.

For users who want to supply the API key via an environment variable, dct-toolkit provides the encrypt\_api\_key command which takes in the API key and DCT URL as inputs and returns an encrypted API key, which can then be exported to an environment variable. As an example, please refer to the section below. The encryption key (not to be confused with the DCT API key) used for encryption is reproducible, hence, it is possible to encrypt and decrypt the DCT API key without storing the encryption key on the file system. Anyone with access to the logic to create an encryption key and knows the inputs for that logic will be able to generate the encryption key, and consequently, will be able to decrypt the DCT API key.

### 12.7.3 Backward compatibility

The dct-toolkit API key encryption feature is fully backward compatible with previous versions of dct-toolkit. dct-toolkit first tries to decrypt the API key; if it fails to decrypt the API key, then the key is used as configured.

### 12.7.4 Example

If the user intends on specifying the API key via an environment variable, then dct-toolkit provides a command to get the encrypted version of the API key:

```
./dct-toolkit encrypt_api_key apiKey=<DCT api key> dctUrl=<DCT instance URL>
```

## 12.8 Configure multiple DCT instances in dct-toolkit

### 12.8.1 Overview

This page describes a setup for a case where users need to connect to multiple DCT instances via dct-toolkit on a single engine. This would be useful in a case like upgrade testing. The user would upgrade the DCT instance in a lower environment (like a development environment) first, then run test APIs with dct-toolkit. Once all of the tests are successful, the user can upgrade the higher environment (like a production environment) and run checks via dct-toolkit. Being able to switch between DCT instances without hassle can be easily configured in dct-toolkit, as described below.

### 12.8.2 Example

The user will first need to create separate dct-toolkit configuration files for the environments that need to connect via dct-toolkit. This can be done by using the configFileOutputLocation option available for the create\_config command:

```
./dct-toolkit create_config url=https://prod.... api_key=....
configFileOutputLocation=<prod config file path>
```

```
./dct-toolkit create_config url=https://dev.... api_key=....
configFileOutputLocation=<dev config file path>
```

Once the configuration files are created, users can create separate aliases for the config files generated above:

alias dct-toolkit-prod="DCT\_TOOLKIT\_CONFIG\_FILE=<prod config file path>"
alias dct-toolkit-dev="DCT\_TOOLKIT\_CONFIG\_FILE=<dev config file path>"

Once the aliases are set up, users can then switch between production and development environments by invoking the corresponding aliases.

To get sources from the production environment, use the following command:

```
dct-toolkit-prod
./dct-toolkit get_sources
```

To get sources from the development environment, use the following command:

```
dct-toolkit-dev
./dct-toolkit get_sources
```

## 12.9 Logging

dct-toolkit has inbuilt logging support, which will export all of the logs to a default location under the user's home directory. The full path will be <user home directory>/.dct-toolkit/logs.dct-toolkit creates a separate log file for every date.

Log level and log directory are both configurable and can be specified in the configuration file or via the environment variable. Please refer to the Installation and setup page for more information.

## 13 Developer resources

- API summary (see page 399)
- API references (see page 402)

## 13.1 API summary

### 13.1.1 Introduction

This page provides an overview of the various data APIs supported by Data Control Tower (DCT), along with example requests and guidance on using them.

DCT offers support for a handful of primary API options, based on development needs and preferences:

- 1. REST API
- 2. Command Line Interface
- 3. Go SDK
- 4. Python SDK
- 5. Integrations

### 13.1.2 1. REST API

The most popular option for interacting with DCT APIs.

- Interactive API documentation: You can explore and experiment with the REST API directly in your web browser using the Swagger interface. To access it, enter your DCT hostname (with the protocol and suffix included) followed by the /api path in the address bar. For example, if DCT is running on gateway.example.com, navigate to https://gateway.example.com/dct/api.
- **API references:** For a detailed list of available REST API endpoints, see our API references<sup>134</sup> page.
- Authentication with Swagger: When authenticating with the Swagger API, be sure to prefix your API key with apk . For instance, if your API key is 1.2345, you should use apk 1.2345 as the authentication header.

It is important to recognize that the REST APIs are the foundation for all other integrations.

<sup>134</sup> https://dct.delphix.com/docs/latest/api-references

### 13.1.3 2. Command Line Interface (CLI)

The second most popular option for interacting with DCT APIs, done through a command line called the dct-toolkit.

DCT Toolkit documentation: The DCT Toolkit commands for DCT can be found here<sup>135</sup>, in our documentation.

#### 13.1.4 3. Go SDK

For developers who prefer to work with Go, DCT provides a Go SDK to help simplify development and integration.

• **Go SDK documentation:** The Go bindings for DCT can be found here<sup>136</sup>, on go.dev.

### 13.1.5 4. Python SDK

The Python SDK is another option for interacting with DCT, offering a Pythonic way to automate tasks within DCT.

- Python SDK documentation: The Python bindings can be found here<sup>137</sup>, on PyPi.
  - · You can install the latest version with the following command:

pip install delphix-dct

#### 13.1.5.1 4a. Querying engines example for Python

This exemplifies how to use the Python SDK to query DCT for information about connected Continuous Data Engines.

```
import delphix.api.gateway
import delphix.api.gateway.configuration
import delphix.api.gateway.api.management_api

cfg = delphix.api.gateway.configuration.Configuration()
cfg.host = "<https://localhost/v2>"

# For example purposes
cfg.verify_ssl = False
```

<sup>135</sup> https://dct.delphix.com/docs/latest/dct-toolkit 136 https://pkg.go.dev/github.com/delphix/dct-sdk-go 137 https://pypi.org/project/delphix-dct-api/

```
# Replace the string with your own API key
cfg.api_key['ApiKeyAuth'] = 'apk 3.tEd4DXFce'
api_client = delphix.api.gateway.ApiClient(configuration=cfg)
engines_api = delphix.api.gateway.api.management_api.ManagementApi(api_client)
print(engines_api.get_registered_engines())
```

The result should appear similar to the following:

```
{
    "items": [
        {
            "connection_status": "ONLINE",
            "cpu_core_count": 2,
            "data_storage_capacity": 23404216320,
            "data_storage_used": 11589626880,
            "hostname": "avm.delphix.com",
            "id": 1,
            "insecure_ssl": True,
            "memory_size": 8589934592,
            "name": "vmname",
            "password": "*****",
            "status": "CREATED",
            "tags": [],
            "type": "UNSET",
            "unsafe_ssl_hostname_check": False,
            "username": "admin",
            "uuid": "ec2fbfea-928b-07f8-94c4-29fea614624f",
            "version": "6.1.0.0"
        }
    ]
}
```

### 13.1.6 5. Integrations

If you prefer a more out-of-the-box approach for your DevOps tooling, Delphix offers a wide array of integration options, outlined more in the Ecosystem hub for integrations<sup>138</sup> documentation. There, you can find information on Delphix-supported integrations, such as ServiceNow, Jenkins, Terraform, or Kubernetes.

<sup>138</sup> https://ecosystem.delphix.com/docs/main/integrations

## 13.2 API references

API documentation for DCT version 20.0.0 and ABOVE can be found by expanding a section and clicking a link, where the \* version coincides with this version of documentation.

#### DCT CD APIs (Continuous Data)

- 24.0.0<sup>139</sup>\*
- **23.0.0**<sup>140</sup>
- **22.0.0**<sup>141</sup>
- **21.0.0**<sup>142</sup>
- 20.0.0<sup>143</sup>

#### DCT CC APIs (Continuous Compliance)

- **24**.0.0<sup>144</sup>\*
- 23.0.0<sup>145</sup>
- **22.0.0**<sup>146</sup>
- 21.0.0<sup>147</sup>
- 20.0.0<sup>148</sup>

<sup>139</sup> https://help-api.delphix.com/dct/cd/24.0.0/ 140 https://help-api.delphix.com/dct/cd/23.0.0/

<sup>141</sup> https://help-api.delphix.com/dct/cd/22.0.0/

<sup>142</sup> https://help-api.delphix.com/dct/cd/21.0.0/

<sup>143</sup> https://help-api.delphix.com/dct/cd/20.0.0/

<sup>144</sup> https://help-api.delphix.com/dct/cc/24.0.0/

<sup>145</sup> https://help-api.delphix.com/dct/cc/23.0.0/

<sup>146</sup> https://help-api.delphix.com/dct/cc/22.0.0/

<sup>147</sup> https://help-api.delphix.com/dct/cc/21.0.0/

<sup>148</sup> https://help-api.delphix.com/dct/cc/20.0.0/