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Data Quality Integration for PowerCenter Guide

Informatica Data Quality Integration for PowerCenter Guide
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Preface

Read the *Informatica Data Quality Integration for PowerCenter® Guide* to find guidelines on setting up and using data quality objects in PowerCenter. You can export mappings with data quality transformations and reference data from a Data Quality environment to a PowerCenter environment. Learn also how to install the Data Quality Integration component to compatible PowerCenter releases.

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To find online support resources on the Informatica Network, visit https://network.informatica.com and select the eSupport option.

CHAPTER 1

Informatica Data Quality Integration

This chapter includes the following topics:

Data Quality Integration Overview

Informatica users can create and run mappings in Informatica Data Quality. The users save the mappings to the Model repository. The users can export the mappings and any related reference data object or file for use in PowerCenter.

As a PowerCenter user, you can import the mappings to the PowerCenter repository and run the mappings in PowerCenter sessions. Use the mappings to analyze and enhance the content and structure of your data.

You can use the mappings that users create in Data Quality 10.5 with the following versions of PowerCenter:

- PowerCenter 10.5 with the latest hotfix installed.
- PowerCenter 10.4 with the latest hotfix installed.
- PowerCenter 10.2 with the latest hotfix installed.

For example, PowerCenter 10.4.1 is the latest hotfix for PowerCenter 10.4.0.

If you use the current versions of Data Quality and PowerCenter, you can import objects that originate in the Model repository without any additional installation. If you use an earlier version of PowerCenter, install and register the current version of the Informatica Data Quality Integration plug-in.

Data Quality Features and Functionality

Informatica Data Quality uses Informatica applications to create objects, save objects to the Model repository, and run mappings.

You may need to install the Informatica Data Quality Plug-in for PowerCenter if you do not use the current product versions.

Use Informatica Data Quality to design and run mappings that achieve the following objectives:

- Profile data. Profiling reveals the content and structure of your data. Profiling is a key step in any data project as it can identify strengths and weaknesses in your data and help you define your project plan.
- Create scorecards to review data quality. A scorecard is a graphical representation of the quality measurements in a profile.
- Standardize data values. Standardize data to remove errors and inconsistencies that you find when you run a profile. You can standardize variations in punctuation, formatting, and spelling. For example, you can ensure that the city, state, and ZIP code values are consistent.
- Parse records. Parse data records to improve record structure and derive additional information from your data. You can split a single field of freeform data into fields that contain different information types. You can also add information to your records. For example, you can flag customer records as personal or business customers.
- Validate postal addresses. Address validation evaluates and enhances the accuracy and deliverability of your postal address data. Address validation corrects errors in addresses and completes partial addresses by comparing address records against reference data from national postal carriers. Address validation can also add postal information that speeds mail delivery and reduces mail costs.
- Find duplicate records. Duplicate record analysis compares a set of records against each other to find similar or matching values in selected data columns. You set the level of similarity that indicates a good match between field values. You can also set the relative weight fixed to each column in match calculations. For example, you can prioritize surname information over forename information.
- Create and run data quality rules. Informatica provides pre-built rules that you can run or edit to suit your project objectives. You can create rules in the Developer tool.
- Collaborate with Informatica users. The rules and reference data tables you add to the Model repository are available to users in the Developer tool and the Analyst tool. Users can collaborate on projects, and different users can take ownership of objects at different stages of a project.
- Export mappings to PowerCenter. You can export mappings to PowerCenter to reuse the metadata for physical data integration or to create web services.

Integration Installers

If you use different versions of Data Quality and PowerCenter to create and store objects, install the Informatica Data Quality Plug-in for PowerCenter. Download the plug-in installers from Informatica.

Install the plug-in version for the version of PowerCenter that you want to use. The plug-in has Client and Server installers.

Run the Client installer on the PowerCenter client machine to view mapplets and mappings in the repository and add them to sessions. Run the Server installer on the PowerCenter Integration Service machine to run the sessions in workflows.

After you install the plug-in on the Integration Service machine, register the plug-in with the PowerCenter repository.

Object Export to PowerCenter

Use the Developer tool to export objects such as mapplets and mappings from the Informatica Model repository. You can export objects from the Model repository to the PowerCenter repository, and you can export objects from the Model repository to the file system. Use the PowerCenter Repository Manager to import XML objects to the PowerCenter repository.

- For information about exporting objects from the Model repository, see the *Informatica Developer Mapping Guide* and the *Informatica Developer Tool Guide*.
- For information about importing objects to the PowerCenter repository, see the *PowerCenter Repository Guide*.

Reference Data Installation

If a mapplet or mapping reads reference data, copy or install the reference data files to the PowerCenter Integration Service machine.

You can use the Developer tool to export reference data from the Model repository when you export a mapplet or mapping. The Developer exports the reference data in a compressed file. You extract the file and copy the reference data to the Integration Service machine.

The export process does not include address reference data files or identity population data files. If the mapplet or mapping that you export reads address reference data files or identity population data files, install the files on the PowerCenter Integration Service machine.

Rules and Guidelines for Product Integration

You can export data quality objects from different versions of Informatica Data Quality to different versions of PowerCenter. Install the Integration plug-in for the version of Informatica Data Quality from which you export the objects.

Consider the following rules and guidelines when you integrate Informatica Data Quality and PowerCenter:

- Do not install the Integration plug-in if the PowerCenter repository product version matches the Model repository product version.
- You cannot run two Data Quality Integration plug-ins concurrently on a single PowerCenter machine. PowerCenter uses the plug-in that you installed most recently. For example, if you install the Data Quality 10.2 Integration plug-in on a PowerCenter 10.1.1 machine, you can no longer import and run data quality objects from a version 10.1.1 Model repository. You can continue to run any data quality object that you imported to the PowerCenter repository before you installed the 10.2 plug-in.
- You cannot edit data quality mapplets or mappings in a PowerCenter repository.

Data Quality Transformation Behavior in PowerCenter

When you import a data quality mapplet or mapping from the Model repository to the PowerCenter repository, the data quality transformation behavior can change.

Conversion to Mapplets

The following transformations can convert to mapplets on import to the PowerCenter repository:

- Consolidation
- Exception
- Key Generator
- Match

When you import a mapping that contains one or more of the transformations, PowerCenter converts each transformation to a mapplet that contains the expanded configuration.

When you import a mapplet that contains one or more of the transformations, PowerCenter expands the configuration of each transformation into multiple transformations.

PowerCenter might add transformations to the data quality transformation or mapplet expansion to complete the transformation logic. For example, PowerCenter expands the Match transformation with additional transformations.

Decision Transformation Considerations

You cannot export a mapping or a mapplet that contains a Decision transformation to PowerCenter if the transformation script includes a system parameter. The export operation cannot convert the system parameter to a value that PowerCenter can use. Before you export a mapping or a mapplet with a Decision transformation that uses a system parameter, replace the parameter with an appropriate value.

Match Transformation Considerations

You cannot run an identity match mapping in PowerCenter if the mapping reads or writes identity index data to database tables. To perform identity match analysis in PowerCenter, configure the Match transformation in the Developer tool to write identity index data to temporary files.

Multi-Strategy Transformations

You can define multiple data transformation strategies within each of the following transformations in the Developer tool:

- Case
- Classifier
- Decision
- Key Generator
- Labeler
- Match
- Merge
- Parser
- Standardizer

When you import a mapplet or mapping that contains a multi-strategy transformation, each strategy converts to a separate transformation.

CHAPTER 2

Installation

This chapter includes the following topics:

Installation Overview

The Data Quality Integration plug-in has a server component and a client component.

Complete the following steps to install and register the plug-in:

1. Run the Server installer on the PowerCenter Integration Service machine.

2. Run the Client installer on the PowerCenter client machine.

3. Register the `IDQZIntegration.xml` file with the PowerCenter repository.

System Requirements

The Informatica Data Quality Integration plug-in has the same system requirements as the PowerCenter applications and services to which it installs.

For information about PowerCenter prerequisites and system requirements, consult the PowerCenter installation documentation.

Before You Install

Consider the following installer behavior if you use reference data in PowerCenter.

The Integration plug-in installer writes property files to the PowerCenter Integration Service machine. The property files specify the locations of the reference data files that data quality mappings can read.

The installer writes the following files:

- AD50.cfg. Stores configuration properties for address reference data.
- CLASSIFIER.properties. Stores configuration properties for classifier model data.
- IDQTx.cfg. Stores configuration properties for identity population data.
- NER.properties. Stores configuration properties for probabilistic model data.

The installer adds the files to the following directory:

```
[PowerCenter_installation]/server/bin
```

Address Reference Data Prerequisite

Before you install address reference data, stop the PowerCenter Integration Service. Restart the service after you install the data.

Installing the Server Plug-in

The Informatica Data Quality Integration Server plug-in installer adds data quality transformation application files to the PowerCenter Integration Service directory structure.

Installing on Windows

Run the Windows Server installer to add the plug-in to a PowerCenter Integration Service machine on a Windows platform.

Close all applications before installing.

1. Log in to the machine with a system user account.
2. Extract the Integration Server file for Windows.
3. Browse to the directory where you extracted the files and run `install.exe`.
4. Select a language and click **OK**.
5. On the **Welcome** screen, click **Next**.
6. Verify that PowerCenter services are not running and click **OK**.
7. Specify the path to the PowerCenter installation directory. The installer provides a default path to this directory. To select another path, click **Choose**.
8. Click **Next**.
9. Review the pre-installation summary. Click **Previous** to fix any error.
10. Click **Install**.
11. Review the post-installation summary.

    For more information about installation tasks and to view configuration properties for the installed components, view the installation log files.

12. Click **Done**.

Installing on UNIX

Run the UNIX Server installer to add the plug-in to a PowerCenter Integration Service machine on a UNIX platform.

1. Log in to the machine with a system user account.
2. Close all other applications.
3. Extract the Integration Server file for UNIX.
4. Open a UNIX shell and navigate to the directory where you extracted the installation files.
5. Enter `sh install.bin`.
6. To accept English as the installation language, press **Enter**.
7. Read the Welcome text and press **Enter**.
8. Type an absolute path to the PowerCenter installation directory, or press **Enter** to accept the default path.
9. Review the pre-installation summary. To fix any error, type `back` and press **Enter**.
10. Press **Enter** to start the installation.
11. Review the post-installation summary.

    For more information about installation tasks and to view configuration properties for the installed components, view the installation log files.
12. Press **Enter** to complete the installation process.

Installing the Client Plug-in

Run the Data Quality Integration Client installer on PowerCenter Client machines.

1. Close all other applications.
2. Extract the Integration Client file.
3. Open the directory where you extracted the files.
4. Run `install.exe`.
5. On the **Welcome** screen, click **Next**.

    The installer displays a prompt to close PowerCenter client applications before continuing the installation.
6. Verify that no PowerCenter client applications are running and click **OK**.
7. Specify the path to the PowerCenter Client directory. The installer provides a default path to this directory. To select another path, click **Choose**.
8. Click **Next**.
9. Review the pre-installation summary. Click **Previous** to fix any error.
10. Click **Install**.
11. Review the post-installation summary.

For more information about installation tasks and to view configuration properties for the installed components, view the installation log files.

12. Click **Done**.

Registering the Plug-In with PowerCenter

Register the plug-in with any PowerCenter repository that you want to contain data quality objects.

The Integration installer writes the `IDQZIntegration.xml` plug-in file to the `$INFA_HOME\server\bin\native` directory on the PowerCenter Integration Service machine. Verify that you can access the file. If required, copy or FTP the file to the PowerCenter Integration Service machine.

▶ To register the plug-in, run the *pmrep RegisterPlugin* command. Include the -N option when you run the command.

   For more information about the *pmrep RegisterPlugin* command, see the *Informatica Command Reference*.

Note: If you do not have the correct privileges to register the plug-in, contact the PowerCenter Repository Service administrator.

CHAPTER 3

Reference Data Requirements

This chapter includes the following topics:

Reference Data Overview

Data quality transformations can read reference data. If any transformation in the PowerCenter repository reads reference data, verify that the reference data files are present in the PowerCenter environment.

Data quality transformations in PowerCenter can use the following types of reference data:

Reference data files

Text files that contain the standard versions of business terms and alternative versions of the terms. You can edit reference data files.

Address reference data files

Data files that contain complete data for all postal addresses in a country. You install address reference data files on the PowerCenter Integration Service machine. You cannot edit address reference data files.

Identity population files

Data files that define different types of identity and contain algorithms used by the Match transformation. You install population files on the PowerCenter services machine. You cannot edit population files.

Content sets

Data files that contain reference data specified by one or more transformations. When you export a mapping that reads content sets, the export process exports the content set data with the transformation metadata. In the case of classifier and probabilistic model files, the process exports the file data from the Data Quality directory structure.

Reference Table Data Requirements

Before you run a mapping that reads reference tables in PowerCenter, copy the column data for the tables to the PowerCenter services machine.

When you export the mapping from the Model repository, the export operation writes the reference table column data to one or more files. The export operation adds the files to a compressed file at a location that you specify. Extract the compressed file and find the column data files. The file names end in `.dic`. Copy the files to the PowerCenter services machine.

The reference data file locations in the PowerCenter directory structure must correspond to the reference table locations in the Model repository.

Use the following directory format to determine the correct locations for the reference table data files:

```
<PowerCenter_Root_Directory>\services\<Model_Repository_Project_Name>
\<Model_Repository_Project_Folder_Name>
```

Rules and Guidelines for Reference Table Data Export

Consider the following rules and guidelines when you export a mapping that reads reference table data:

- To export the mapping from the Model repository, choose the **Informatica** > **PowerCenter** option in the export wizard. When you choose the **PowerCenter** option, the export operation writes both managed reference table data and unmanaged reference table data to the file system.
- The export operation specifies the first column in each reference table as the valid column.
- PowerCenter reads reference data files in UTF-8 format.

Using an Environment Variable to Define the Reference Data File Location

You can define an *INFA_CONTENT* environment variable on the PowerCenter Integration Service machine to set the path that the Integration Service uses to read reference data files.

Use this environment variable if you cannot install the files in the required location on the PowerCenter Integration Service machine. Install the files in a location that the PowerCenter Integration Service can read, and create the *INFA_CONTENT* environment variable with the installed path.

Address Reference Data Requirements

A mapping that performs address validation reads address reference data. You purchase and download address reference data from Informatica. Install the data files to the PowerCenter Integration Service machine.

The following table describes the types of address reference data that you can install:

Type of Reference Data	When To Use
Address Code Lookup	Use to retrieve a partial address or a full address from a code value on an input port. The completeness of the address depends on the level of address code support in the country to which the address belongs. You can use address code lookup data with address records from the following countries: - Austria. Returns an address to building level. - Germany. Returns an address to locality, municipality, or street level. - Japan. Returns an address to the unique mailbox level. - South Africa. Returns an address to street level. - South Korea. Returns an address to the unique mailbox level. - Serbia. Returns an address to street level. - United Kingdom. Returns an address to the unique mailbox level.
Batch	Use for general address validation operations.
CAMEO	Use to add consumer demographic data to the address records.
Certified	Use to verify that address records meet the certification standards that a mail carrier defines. The following countries define certification standards: - Australia. Certifies mail according to the Address Matching Approval System (AMAS) standard. - Canada. Certifies mail according to the Software Evaluation And Recognition Program (SERP) standard. - France. Certifies mail according to the National Address Management Service (SNA) standard. - New Zealand. Certifies mail according to the SendRight standard. - United States. Certifies mail according to the Coding Accuracy Support System (CASS) standard.
Suggestion list	Use to find alternative valid versions of an incomplete address record. Use suggestion list data when you configure an address validation mapping to process single address records in real time.
Geocode	Use to add latitude coordinates and longitude coordinates to the address records.
Supplementary	Use to enrich address records with additional geographic or demographic data.

The PowerCenter Integration Service reads the path to the address reference data from the AD50.cfg configuration file.

The PowerCenter installer writes the AD50.cfg file to the following path:

```
[PowerCenter_Installation]/server/bin
```

When you install address reference data, verify that the following properties are set in AD50.cfg:

Reference Data Location

Enter the path to the address reference data in the `ReferenceDataLocation` property.

License Key Data

Enter license data in the `LicenseKey` property. If you have more than one license, enter each license in a comma-separated string.

Preload Values

Enter at least one country abbreviation as a preload value for each type of reference data that a mapping reads. Enter ALL to apply a preload setting for all countries.

The Integration Service can use a different method to load data for each country. For example, you can specify full preload for United States batch/interactive data and partial preload for United Kingdom batch/interactive data. The Integration Service can also use a different preload method for each type of data. For example, you can specify full preload for United States batch/interactive data and partial preload for United States geocoding data.

Full preload settings supersede partial preload settings, and partial preload settings supersede settings that indicate no data preload. For example, if you enter ALL for no data preload and enter USA for full preload, the Integration Service loads all United States data into memory and does not load data for any other country. If you do not have a preload requirement, enter ALL for no data preload for any type of reference data that you plan to use.

You do not specify a preload value for Supplementary data.

You can optionally edit other properties in AD50.cfg.

Identity Population Data Requirements

A mapping that performs identity match analysis reads reference data files called identity populations. You purchase and download the identity population files from Informatica. Copy the population files to the PowerCenter Integration Service machine or to a shared directory on a machine that the PowerCenter Integration Service can access.

You must copy or install the population files to a directory with the name `default`.

The PowerCenter Integration Service can read the location of the population file directory from the IDQTx.cfg configuration file or from the SSAPR environment variable. The PowerCenter Integration Service looks for the location in the IDQTx.cfg file. If the IDQTx.cfg file is not present or does not specify a location, the PowerCenter Integration Service looks for the location in the SSAPR environment variable.

Note: The IDQTx.cfg file and the SSAPR environment variable specify the path to the parent directory of the `default` directory. The path does not include the directory name.

The PowerCenter installer writes the IDQTx.cfg file to the following path:

`[PowerCenter_Installation]/server/bin`

The IDQTx.cfg file uses the *IdentityReferenceDataLocation* property to specify the location of the population file directory. Update the property with the current location of the directory.

For example, you might set the following path on the *IdentityReferenceDataLocation* property:

`[PowerCenter_Installation]/services/DQContent/INFA_Content/identity/`

You can set an absolute path or a relative path to the default directory on the *IdentityReferenceDataLocation* property. Set an absolute path to a directory on the PowerCenter Integration Service machine or to a shared

directory on a machine that the service can access. Set a relative path to a directory on the PowerCenter Integration Service machine.

The PowerCenter Integration Service reads a relative path from the following directory:

```
[PowerCenter_Installation]/server/bin
```

For example, to specify a relative path to a population file directory in the `bin` directory, set the following relative path:

```
./
```

IDQTx.cfg Properties

When you set the IdentityReferenceDataLocation property in the IDQTx.cfg file, you can also set the following properties:

IdentityCacheDir

Path to the directory that stores temporary data files created when the mapping runs. The path identifies a parent directory. The PowerCenter Integration Service writes the temporary files to directories below the location that you specify.

The property has the following default value:

```
./identityCache
```

IdentityIndexDir

Path to the directory that contains the temporary index files created when the mapping runs. Identity match analysis uses the index to sort records into groups before match analysis. The path identifies a parent directory. The PowerCenter Integration Service writes the index files to directories below the location that you specify.

The property has the following default value:

```
./identityIndex
```

Note: A Developer tool user can set the cache directory path and the index directory path in the Match transformation. The PowerCenter Integration Service uses the path in the IDQTx.cfg file if the Match transformation does not specify the path.

Probabilistic Model and Classifier Model Requirements

Probabilistic models and classifier models are reference data files that identify the types of information in a data string.

Before you run a mapping that reads a probabilistic model or classifier model file, perform the following tasks:

- Copy the model file locations in the PowerCenter directory structure.

- Update the Java memory allocation on the PowerCenter Integration Service.

Probabilistic Model and Classifier Model File Locations in PowerCenter

Before you run a mapping that reads a probabilistic model or a classifier model in PowerCenter, copy the model file to the PowerCenter services machine.

When you export the mapping from the Model repository, the export operation adds each model to a compressed file at a location that you specify. Extract the compressed file and find the model files that the mapping reads. Probabilistic model and classifier model data file names end in `.ner` and `.classifier` respectively. Copy the files to a directory that the PowerCenter Integration Service can read.

By default, the PowerCenter Integration Service reads the model files from the following directory:

`[PowerCenter_Installation]/server/bin`

If the files are not in the default location, the PowerCenter Integration Service reads the file locations from property files. You update the property files with the paths to the model files.

The following table describes the property files:

File Name	Description
CLASSIFIER.properties	Contains the *ClassifierFileLocation* property. Update the property to identify the path to the classifier model files.
NER.properties	Contains the *NERFileLocation* property. Update the property to identify the path to the probabilistic model files.

The PowerCenter Integration Service reads the property files from the following directory:

`[PowerCenter_Installation]/server/bin`

Rules and Guidelines for Probabilistic Model and Classifier Model Export

Consider the following rules and guidelines when you export a mapping that reads reference table data:

- When you export a mapping that reads probabilistic model or classifier model data for use in PowerCenter, select the **Informatica** > **Export Object Metadata File** option in the export wizard to create the compressed file.

  The export operation also exports the mapping as an XML file. You can disregard the XML file.

- Select the option to export trained models only. A trained probabilistic model or classifier model contains the logical data that the mapping reads and does not contain the source data for the model. Copy the trained model files to the PowerCenter services machine.

- Export the mapping from the Model repository to the PowerCenter repository in a separate operation. To export the mapping from the Model repository to the PowerCenter repository, select the **Informatica** > **PowerCenter** option.

  When you select the **PowerCenter** option, the export operation can copy reference data from managed reference tables and unmanaged reference tables.

- You can set an absolute path or a relative path to identify the model file locations in each property file. If you set a relative path, the PowerCenter Integration Service adds the path to the following directory:

  `[PowerCenter_Installation]/server/bin`

- Use forward slashes to define the directory paths to the model files on all platforms.

PowerCenter Integration Service Memory Allocation

A PowerCenter Integration Service uses large amounts of memory to read a classifier model file or a probabilistic model file. If the PowerCenter Integration Service cannot access the required memory, it fails to read the model file and it cannot process the data.

Review the memory allocation on the PowerCenter Integration Service. If you run sessions that reference a classifier model file or a probabilistic model file, set the memory allocation to at least 512 MB.

You can use the *Java SDK Maximum Memory* process property to allocate the memory. To review or update the property, log in to the Administrator tool and select the PowerCenter Integration Service that runs the session tasks. You find the *Java SDK Maximum Memory* property on the **Processes** view.

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