



Informatica® Cloud Data Integration for  
PowerCenter  
November 2024

# PowerCenter Modernization

Informatica Cloud Data Integration for PowerCenter PowerCenter Modernization  
November 2024

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# Preface

Read the *PowerCenter Modernization* guide to learn how to use Cloud Data Integration for PowerCenter to modernize your PowerCenter assets in a self-service manner. Learn how to assess a PowerCenter repository, convert the PowerCenter asset to the cloud, bulk update the assets metadata, and monitor assessment, conversion, and bulk update jobs.

# CHAPTER 1

## Getting started with PowerCenter modernization

Leverage the benefits of Informatica cloud by migrating your PowerCenter assets to the cloud.

Cloud Data Integration for PowerCenter (CDI-PC) offers a streamlined solution to modernize your legacy PowerCenter assets by seamlessly migrating them to the cloud. The automated and self-service solution minimizes the risks associated with manual migration of your assets and accelerates time to value from the migration process. When you migrate your assets, CDI-PC converts the PowerCenter mappings, maplets, sessions, and workflows to Data Integration mappings, maplets, mapping tasks, and taskflows.

Migrating your PowerCenter assets using CDI-PC offer the following benefits:

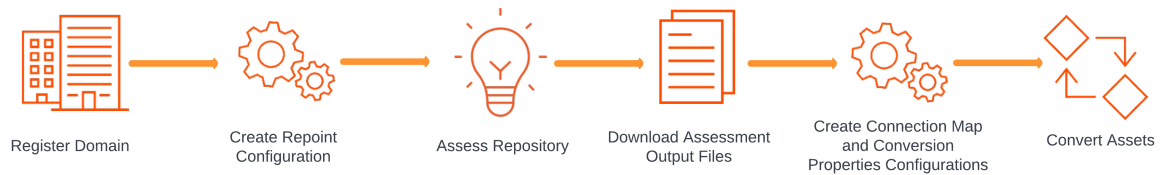
- **Cost Savings:** CDI-PC automates more than 90% of the migration process, that can save substantial expenses associated with regular PowerCenter upgrades, administrative overhead, and other maintenance activities.
- **Flexibility and Self-Paced Modernization:** You can tailor the migration process to your business priorities, budget, and resource availability. You have the flexibility to migrate your PowerCenter assets to the cloud at your own pace and in a phased manner.
- **Cloud Advantages:** After you move your assets to the cloud, you gain access to the full range of benefits provided by the IDMC platform. The advantages include the utilization of various cloud-native services to meet your end-to-end data management requirements.

## Modernization process

There are multiple steps that you need to perform to modernize your PowerCenter assets using CDI-PC.

Begin your modernization journey by registering your on-premise domains in Informatica Intelligent Data Management Cloud to establish communication between on-premise domain and cloud. Based on the modernization journey, you can then create required configurations, assess repository, convert the PowerCenter assets to the cloud, and update the metadata of the assets.

The following image shows the high-level steps you need to perform to modernize your PowerCenter assets:



The modernization process involves the following steps:

### **Register domain**

Before you start your modernization journey, you need to register your on-premise domains in Informatica Intelligent Cloud Services. When you register a domain, you link the on-premise domain with the cloud and establish communication between them. After you register a domain, you can monitor the domain from the cloud, update the domains, and modernize the assets that are available in the repositories of the domain. For more information about registering a domain, see the *Register a domain* topic.

### **Create reposit configuration**

Create a reposit configuration where you can define different endpoints to which you want to reposit the assets. Use this configuration in assessment tasks to evaluate the feasibility of repositing the assets to another endpoint. For more information about creating a reposit configuration, see the *Creating a Reprint Configuration* topic. Apart from the reposit configuration, Informatica recommends that you copy the parameter files generated from your PowerCenter environment to a shared location.

### **Assess repository**

After you register a domain, you can view a list of repositories within the domain. Assess a repository to evaluate the feasibility of converting PowerCenter assets. Based on the feasibility, CDI-PC categorizes the assets into different categories. After you assess a repository, you can view the folders and workflows within the repository. For more information about assessment, see the *Repository Assessment* topic.

### **Download assessment output files**

The assessment job generates a report that contains a breakdown of the assets along with the list of flags responsible for manual or partial conversion of the assets. For more information about the output files, see the *Assessment output files* topic.

### **Create connection map and conversion properties configurations**

If you want to reposit your endpoint after migrating to the cloud, you need to create a Connection Map configuration to map PowerCenter connections with Cloud Data Integration connections. Additionally, you can create a Conversion Properties configuration to override the default conversion behavior.

### **Convert assets**

Finally, from the repository that you assessed, select the workflows that you want to convert and add them to a conversion task. Run the conversion task to convert the PowerCenter assets to the Cloud Data Integration assets. For more information about converting assets, see the *Asset Conversion* topic.

### **Update asset metadata**

After you convert and migrate the PowerCenter assets to the Cloud Data Integration assets, you can update the metadata of the assets using bulk update tasks. Add the project and folder location of the assets to the export metadata task and upload the updated metadata to the update metadata task. Run the tasks to export the metadata and update the assets with new metadata. For more information, see the *Asset Bulk Update* topic.

# Roles and privileges

Before you can use CDI-PC for modernization, the organization administrator must create the roles that are used for modernization, assign the right permissions and privileges to the roles, and then assign relevant users to the role.

Roles define the activities and tasks that users are allowed to do. When the organization administrator creates roles and sets the correct permissions and privileges, the roles define the boundaries within which the users can act. After the roles are defined, the organization administrator can assign specific users and user groups to the role.

For more information about creating roles and assigning users, see the *Cloud Platform* help.

## Asset permissions

The organization administrator can configure permission for assets that user roles can access in CDI-PC for modernization. Depending on the user roles and permissions, you can view or modify assets.

To configure asset permissions for user roles, go to Informatica Intelligent Cloud Services Administrator, open a role, select **Workbench Service**, and select one or more permissions on the **Assets** tab for the role.

Additionally, in the same role, select **Domain Management Service**, and assign at least read permission for the Domain Registration asset type. This permission is required to access the CDI-PC service.

For more information about assigning asset permissions to user roles, see the Cloud Platform help.

## Asset permissions for conversion task

To create or run conversion tasks, you need additional asset permissions from different IDMC services.

To configure asset permissions for user roles, go to Informatica Intelligent Cloud Services Administrator, open a role, select the required service, and select one or more permissions on the **Assets** tab for the role.

The following table lists the services along with the asset privileges that are required to create or update a conversion task:

| Service           | Asset              | Privileges           |
|-------------------|--------------------|----------------------|
| Workbench Service | Assessment Task    | Read                 |
|                   | Conversion Task    | Create, Read, Update |
| Administrator     | Folder             | Create, Read         |
|                   | Project            | Create, Read         |
|                   | Secure Agent       | Read                 |
|                   | Secure Agent Group | Read                 |



The following table lists the services along with the asset privileges that are required to run a conversion task:

| Service           | Asset                             | Privileges           |
|-------------------|-----------------------------------|----------------------|
| Workbench Service | Conversion Task                   | Read, Run            |
|                   | Connection Map Configuration      | Read                 |
|                   | Conversion Property Configuration | Read                 |
| Administrator     | Connection                        | Create, Read, Update |
|                   | Folder                            | Create, Read, Update |
|                   | Project                           | Create, Read, Update |
|                   | Secure Agent                      | Read                 |
|                   | Secure Agent Group                | Read                 |
| Data Integration  | File Listener                     | Create, Read, Update |
|                   | Fixed-Width File Format           | Create, Read, Update |
|                   | Mapping                           | Create, Read, Update |
|                   | Mapping Task                      | Create, Read, Update |
|                   | Mapplet                           | Create, Read, Update |
|                   | PowerCenter Task                  | Create, Read, Update |
|                   | Sequence Generator                | Create, Read, Update |
|                   | Taskflow                          | Create, Read, Update |
|                   | User-Defined Function             | Create, Read, Update |

The following table lists the services along with the asset privileges that are required to run a parameter file conversion task:

| Service           | Asset                          | Privileges           |
|-------------------|--------------------------------|----------------------|
| Workbench Service | Parameter File Conversion Task | Create, Read, Update |
| Administrator     | Folder                         | Create, Read, Update |
|                   | Project                        | Create, Read, Update |

| Service | Asset              | Privileges |
|---------|--------------------|------------|
|         | Secure Agent       | Read       |
|         | Secure Agent Group | Read       |

The following table lists the services along with the asset privileges that are required to run a configuration task:

| Service           | Asset                             | Privileges           |
|-------------------|-----------------------------------|----------------------|
| Workbench Service | Connection Map Configuration      | Create, Read, Update |
|                   | Conversion Property Configuration | Create, Read, Update |
|                   | Assessment Reprint Configuration  | Create, Read, Update |

## Asset permissions for bulk update task

To create or run bulk update tasks, you need additional asset permissions from various IDMC services.

To configure asset permissions for user roles, go to Informatica Intelligent Cloud Services Administrator, open a role, select the required service, and select one or more permissions on the **Assets** tab for the role.

The following table lists the services along with the asset privileges that are required to create or update a bulk update task:

| Service           | Asset              | Privileges           |
|-------------------|--------------------|----------------------|
| Workbench Service | Bulk Update Task   | Create, Read, Update |
| Administrator     | Folder             | Create, Read         |
|                   | Project            | Create, Read         |
|                   | Secure Agent       | Read                 |
|                   | Secure Agent Group | Read                 |

The following table lists the services and the asset privileges that are required to run a bulk update task:

| Service           | Asset            | Privileges           |
|-------------------|------------------|----------------------|
| Workbench Service | Bulk Update Task | Read, Run            |
| Administrator     | Folder           | Create, Read, Update |
|                   | Project          | Create, Read, Update |

| Service          | Asset                   | Privileges           |
|------------------|-------------------------|----------------------|
|                  | Secure Agent            | Read                 |
|                  | Secure Agent Group      | Read                 |
| Data Integration | File Listener           | Create, Read, Update |
|                  | Fixed-Width File Format | Create, Read, Update |
|                  | Mapping                 | Create, Read, Update |
|                  | Mapping Task            | Create, Read, Update |
|                  | Mapplet                 | Create, Read, Update |
|                  | PowerCenter Task        | Create, Read, Update |
|                  | Sequence Generator      | Create, Read, Update |
|                  | Taskflow                | Create, Read, Update |
|                  | User-Defined Function   | Create, Read, Update |

## Feature privileges

The organization administrator can configure specific privileges for user roles in CDI-PC for modernization. Depending on the privileges, users can access certain features while other features are restricted.

To grant feature privileges to user roles, go to Informatica Intelligent Cloud Services Administrator, open a role, select **Workbench Service**, and select one or more features on the **Features** tab. For more information about assigning feature privileges to users, see the *Cloud Platform* help.

### Features in Workbench Service

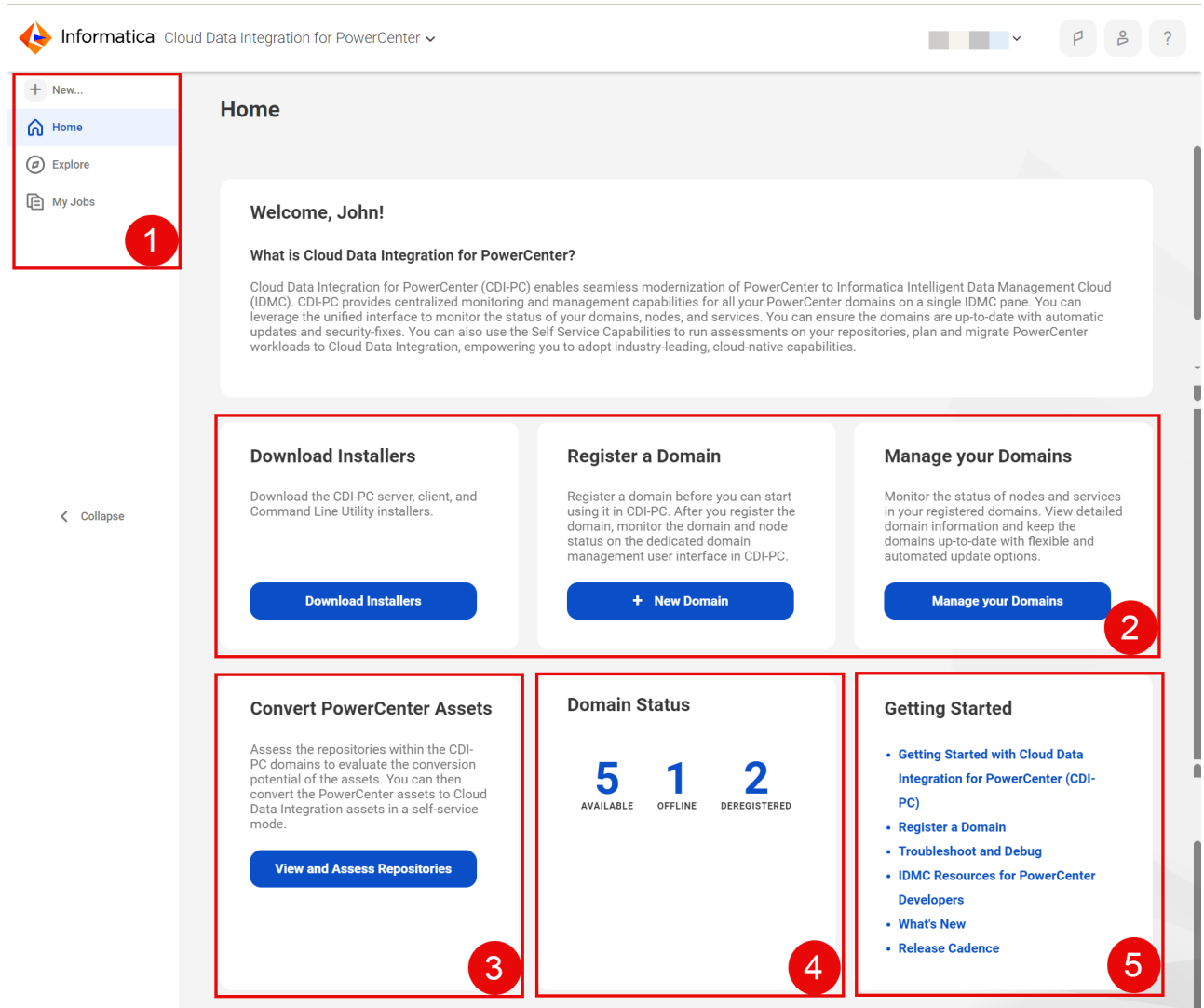
The following table explains the features that are available in the Workbench service in Informatica Intelligent Cloud Services Administrator:

| Feature                 | Description   |
|-------------------------|---|
| Download Artifacts      | Allows users to download the files generated from an assessment job or a conversion job.  |
| Repository Assessment   | Allows users to assess a repository.<br><b>Note:</b> To run an assessment job, make sure that the Admin role is assigned to the user. |
| View Assessment Results | Allows users to access the assessment results.  |
| view Configurations     | Allows users to view the configurations.  |
| View Jobs               | Allows users to view the details of assessment, conversion, and parameter file conversion jobs.                                       |
| View Tasks              | Allows users to view the details of the assessment, conversion, and parameter file conversion tasks.                                  |

# User interface for PowerCenter modernization

Use the interactive user interface of CDI-PC to perform the modernization tasks.

The following image shows a sample CDI-PC home page:



## 1. Navigation Bar

Navigate to different components of CDI-PC to perform modernization. The navigation bar displays the following menu items:

| Menu item | Description  |
|-----------|--|
| New       | Select the PowerCenter modernization configuration or task that you want to create.                                  |
| Home      | View the status of the registered domains, use shortcuts to perform different actions, and access the documentation. |

| Menu item | Description  |
|-----------|--|
| Explore   | Explore the domains, repositories, and conversion tasks. You also have the option to explore the complete list of tasks. |
| My Jobs   | Monitor the status of assessment and conversion jobs.  |

## 2. Download Installers, Register a Domain, and Manage your Domains

Use the quick start menu options to download CDI-PC binaries, register a domain, and monitor the registered domains. For more information about domain management, see the *Domain Registration* section.

## 3. Convert PowerCenter Assets

Use the quick start menu option to view the list of repositories within the registered domains. You can assess a repository and then convert the PowerCenter assets to the cloud.

## 4. Domain Status

View the status of the registered domains.

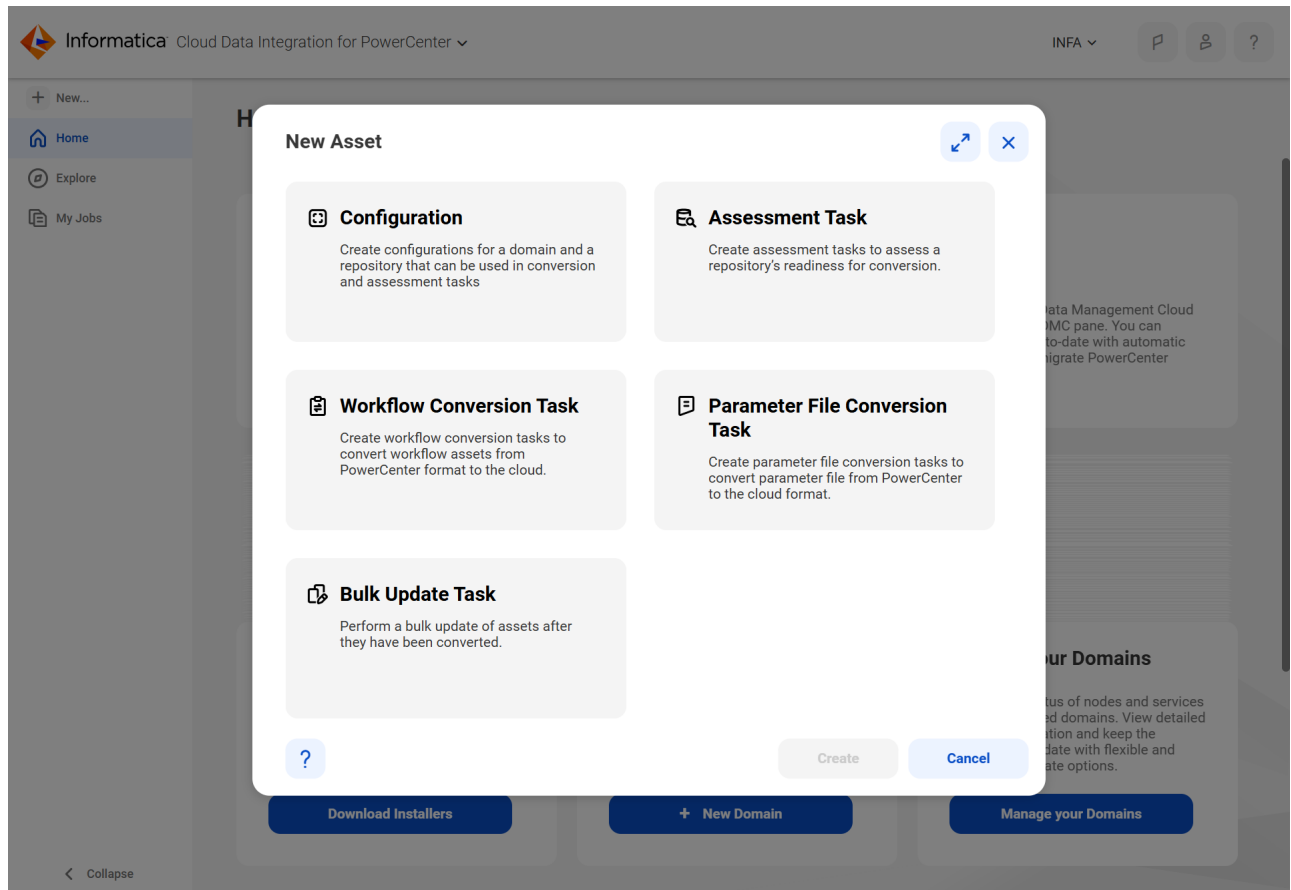
## 5. Getting Started

Access the documentation and other related resources to learn and use CDI-PC effectively.

## New Asset dialog box

Use the **New Asset** dialog box to create new configuration files, assessment tasks, workflow conversion tasks, or parameter file conversion tasks.

The following image shows the different tasks or configurations that you can create using the **New Asset** dialog box:

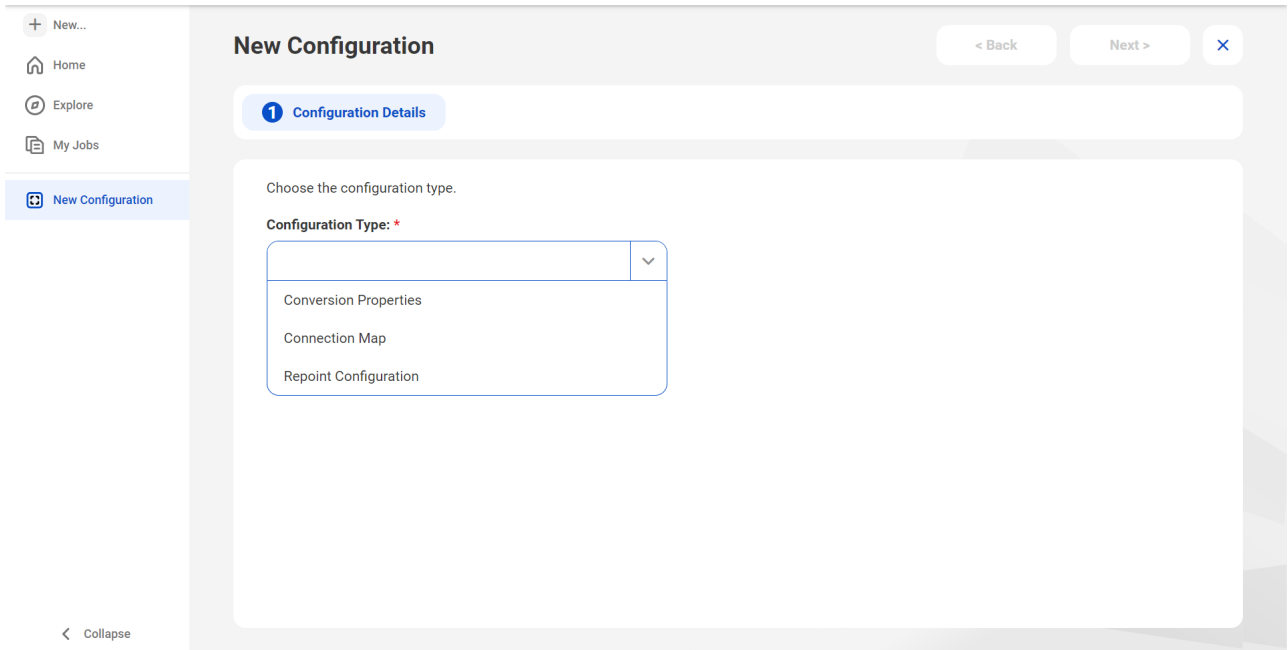


## Configuration

A configuration is a collection of parameters that you can use in conversion tasks to override the default conversion behavior, map PowerCenter connections to IDMC connections in conversion tasks, or evaluate the feasibility of repointing in assessment tasks.

You can create and manage configurations for assessment and conversion tasks.

The following image shows the available configuration options:



You can create the following configurations:

- Conversion Properties. Use this configuration in conversion tasks to override the default conversion behavior.
- Connection Map. Use this configuration in conversion tasks to map the PowerCenter connections to IDMC connections.
- Repoint Configuration. Use this configuration in assessment tasks to evaluate the feasibility of repointing the assets to another endpoint.

### Assessment Task

Create a new assessment task to assess a PowerCenter repository that includes reviewing the asset details within the repository and their conversion feasibility to the cloud environment.

The following image shows the **New Assessment Task** page:

**New Assessment Task** Validate Start Assessment X

The assessment process evaluates the feasibility of asset conversion. As part of the process, a repository backup will be initiated and it might require several minutes to complete.

**Name of the task:** \*  **Domain:** \*

**Assessment Task Location:** \*  Browse... **Repository Type:** \*

**Runtime Environment:** \*  **Repository:** \*

**Description:**

**Shared Folder Location:** \*

I have placed the parameter files in the shared folder.

---

**Migrate to a different endpoint**

You can migrate your PowerCenter assets to the cloud without repointing to another target. If you choose to migrate to a different end point, you will have to choose the configuration from here.

Migrate to a different endpoint

## Workflow Conversion Task

After you complete the assessment of a repository, you can start the conversion process for the workflows in the repository. You can create a conversion task to specify the workflows that you want to convert to Cloud Data Integration. You can only convert the workflows that have their assessment results as automated or partial. Workflows that have assessment results as manual require you to manually convert the workflows after the completion of the assessment.

The following image shows the **New Workflow Conversion Task** page:

**New workflow conversion task** < Back Next > Save and Close Save and Run X

1 General Details 2 Select Folder 3 Select Workflows 4 Convert

Create this task to choose the workflows for conversion and to kick start the conversion process.

**Name of the task:** \*  **Domain:** \*

**Conversion Task Location:** \*  Browse... **Repository:** \*

**Runtime Environment:** \*

**Description:**

## Parameter File Conversion Task

You can create a parameter file conversion task to convert PowerCenter parameter files to Cloud Data Integration parameter files.

The following image shows the **New Workflow Conversion Task** page:



### New Parameter File Conversion Task

Save and Close Save and Run X

Create a parameter file conversion task to convert PowerCenter parameter files to Cloud Data Integration parameter files.

Task Name: \* ParameterFileConversionTask-583

Description: Enter Description

Task Location: \* ? Default Browse...

Project Name: \* ?

Runtime Environment: \* ?

---

Enter the paths for the parameter zip file and conversion input file, then validate to proceed.

PowerCenter Parameter File Location: \* ?

Conversion Input File Location: ?

Validate Locations

## Bulk Update Task

After you convert and migrate the PowerCenter assets to the Cloud Data Integration assets, you can create bulk update tasks to update the metadata of the assets. You can create export metadata tasks to export the existing metadata of the assets as Excel template files. After you update the Excel template files with new metadata, you can create update metadata tasks to update the metadata of the assets.

The following image shows the **New Bulk Update Task** page:

### New Bulk Update Task

< Back Next > Save and Close Save and Run X

1 Enter Details 2 Confirm Details

Choose an operation type and enter the details. ?

Bulk Update Operation: \* Export Metadata

Asset Type:  Mapping  Taskflow

Task Name: \* BulkUpdateTask-4

Description:

Task Location: \* ? Default Browse...

Project/Folder: \* ? Location Browse...

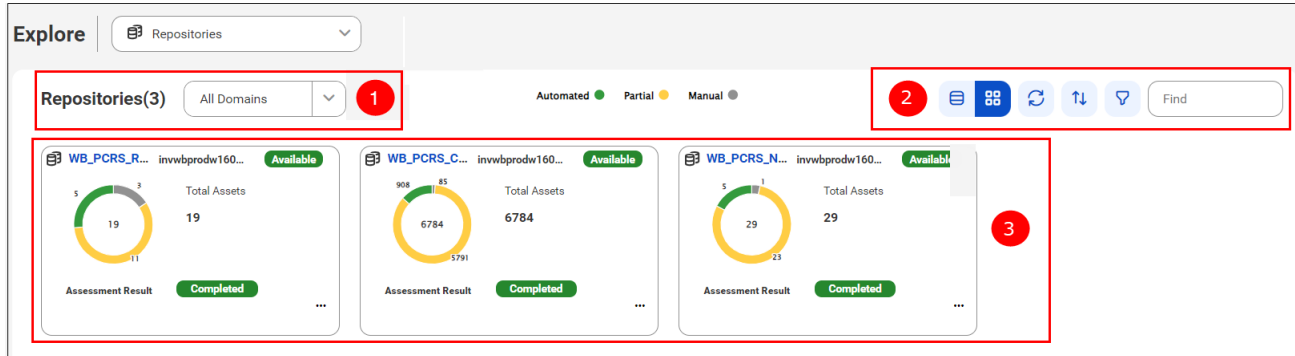
Operation: \* Update field details

# Repositories page

On the **Repositories** page, you can view the repositories associated with the registered domains and assess the repositories.

Click **Explore** from the left navigation menu and select **Repositories** from the drop-down list. The page displays the list of repositories available in the registered domains in a tile view. You can click an assessed repository to view the folders and workflows within the repository.

The following image shows the **Repositories** page:



## 1. Filter repositories by domain

Select a domain to view the repositories associated with the domain.

## 2. Toolbar Menu

The toolbar menu contains the following options:

- Switch between list view and tile view
- Refresh repositories
- Sort repository list by repository name, number of assets, and domain name
- Filter repository list by repository name, domain name, and assessment status
- Search for a repository using repository name or domain name

## 3. Repositories

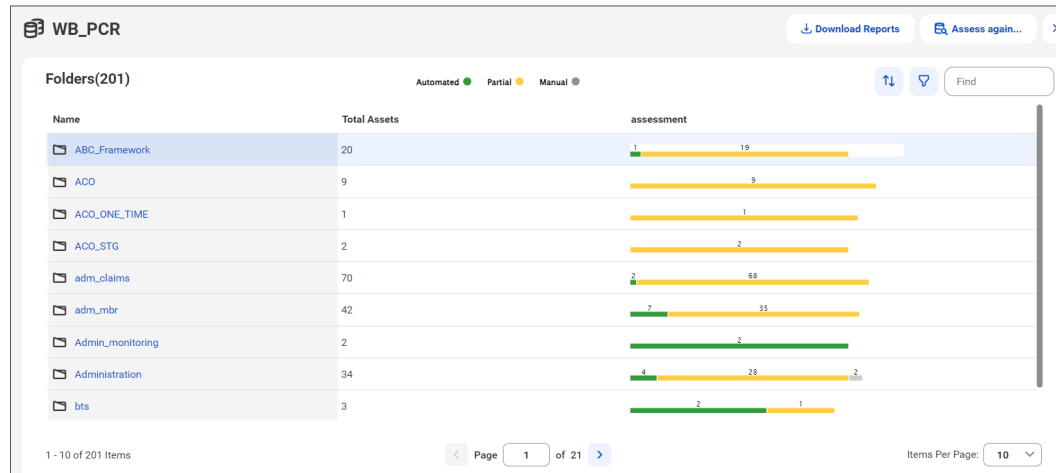
The repositories within the selected domain. By default, the repositories are displayed in tile view. If required, you can switch to list view. The tiles for assessed repositories contains the following information:

- Repository name
- A pie chart displaying the asset breakdown based on their conversion potential
- Total number of assets in the repository
- Availability status of the repository
- Assessment status of the repository
- Context menu to assess the repository and download assessment report

If the above details are not available for a repository, assess the repository to get these details.

## Repository folders

When you click an assessed repository, you can see the folder structure of the corresponding PowerCenter repository. You can click a folder to view the workflows within the folder. The following image shows sample folders within a repository:



Each folder displays the total number of assets along with the breakdown of the assets based on their conversion potential. You can download the assessment report or assess the repository again to view the latest assessment status.

## Workflows

When you click a folder of an assessed repository, the **Workflows** page appears containing the list of workflows within the folder.

The following image shows sample workflows within a folder:

| Name                    | Conversion Status | Assessment results                   |
|-------------------------|-------------------|--------------------------------------|
| wkf_BTS_OUTPUT_FILES    | Pending           | Automated                            |
| wkf_NIPR_PDB_ALERT      | Pending           | Partial <a href="#">More details</a> |
| wkf_PARM_NIPR_PDB_ALERT | Pending           | Automated                            |

Each workflow displays its assessment result and conversion status. You can click the links in the **Assessment Result Details** column to view the list of flags responsible for manual or partial conversion of a workflow. You can select workflows with automated or partial assessment, and create a conversion task with these workflows.

## Configurations page

You can manage an existing configuration by performing different actions on the configuration, such as modifying the configuration, creating a copy of an existing configuration, or renaming a configuration.

The **Configurations** page lists the repoint, connection map, and conversion properties configurations. Click the actions menu on a configuration and select the appropriate action to manage the configuration.

You can perform the following actions on a configuration:

### View

Click **View** to view the configuration details.

### Edit

Click **Edit** to modify the configuration description and properties for the configuration.

### Copy

Click **Copy** to copy the configuration to another domain and repository with a different name.

### Rename

Click **Rename** to change the name of the configuration.

### Set as default

Click **Set as default** to set the configuration as the default configuration. For each configuration type, you can set one configuration as default. When you select a configuration in assessment or conversion tasks, the configuration is marked as default.

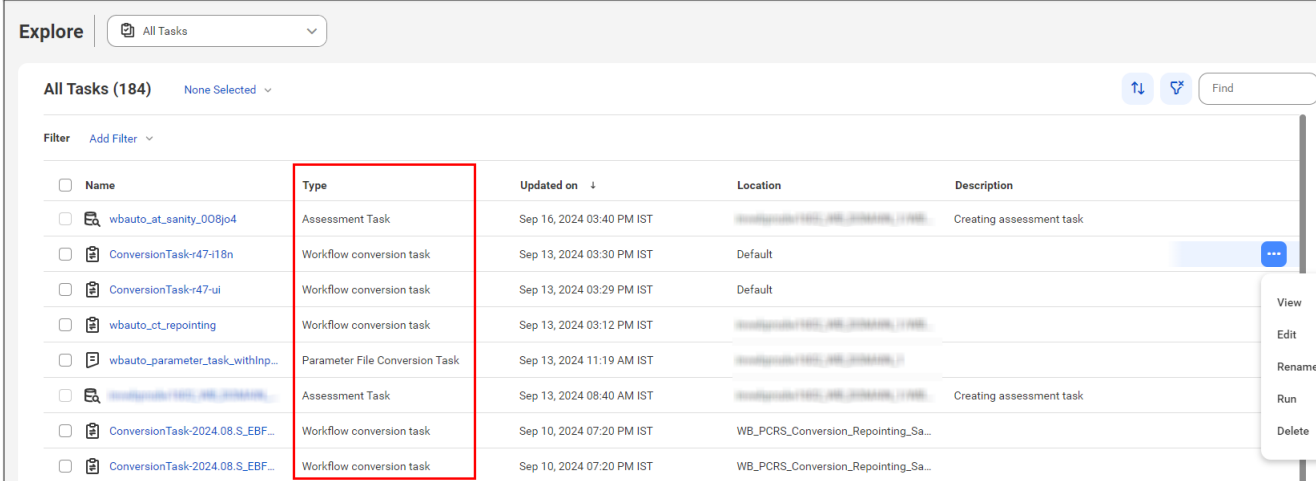
### Delete

Click **Delete** to delete a configuration. You can delete a configuration only if it is not associated with any assessment or conversion task.

## All Tasks page

Click **Explore** from the left navigation menu and select **All Tasks** from the drop-down list. The list of tasks that you created appears.

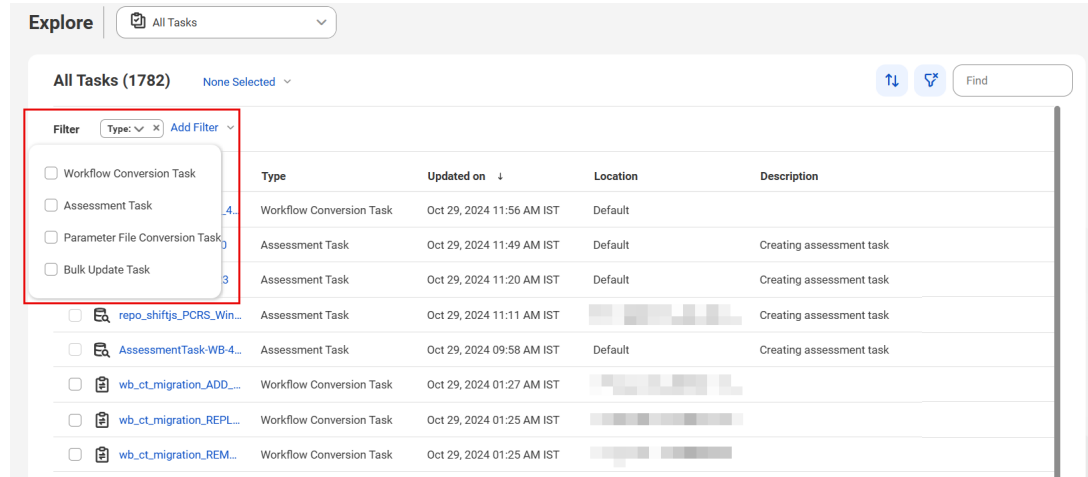
The following image shows a sample **All Tasks** page:



| Name  | Type                           | Updated on                | Location                            | Description              |
|---|--------------------------------|---------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/> <a href="#">wbauto_at_sanity_008jo4</a>          | Assessment Task                | Sep 16, 2024 03:40 PM IST | ...                                 | Creating assessment task |
| <input type="checkbox"/> <a href="#">ConversionTask-r47-t18n</a>          | Workflow conversion task       | Sep 13, 2024 03:30 PM IST | Default                             |                          |
| <input type="checkbox"/> <a href="#">ConversionTask-r47-ui</a>            | Workflow conversion task       | Sep 13, 2024 03:29 PM IST | Default                             |                          |
| <input type="checkbox"/> <a href="#">wbauto_ct_repointing</a>             | Workflow conversion task       | Sep 13, 2024 03:12 PM IST | ...                                 |                          |
| <input type="checkbox"/> <a href="#">wbauto_parameter_task_withinp...</a> | Parameter File Conversion Task | Sep 13, 2024 11:19 AM IST | ...                                 |                          |
| <input type="checkbox"/> <a href="#">wbauto_at_sanity_008jo4</a>          | Assessment Task                | Sep 13, 2024 08:40 AM IST | ...                                 | Creating assessment task |
| <input type="checkbox"/> <a href="#">ConversionTask-2024.08.S_EBF...</a>  | Workflow conversion task       | Sep 10, 2024 07:20 PM IST | WB_PCRS_Conversion_Repointing_Sa... |                          |
| <input type="checkbox"/> <a href="#">ConversionTask-2024.08.S_EBF...</a>  | Workflow conversion task       | Sep 10, 2024 07:20 PM IST | WB_PCRS_Conversion_Repointing_Sa... |                          |

Each task displays the name, last update time, description, and location where the converted workflows are stored in Cloud Data Integration. You can use the actions menu to run a conversion job, edit the job details, or delete the job. Click a task name to view the details for the task.

Use the filter option to filter the tasks based on the task type as shown in the following image:



## Sizing recommendations

To manage concurrent execution of multiple assessment and conversion jobs, Informatica recommends that you group the Secure Agents. When you group the Secure Agents, the task distribution is balanced between the Secure Agents, allowing each agent to process one assessment job and two conversion jobs simultaneously.

To enable parallel execution of two assessment tasks, ensure that you have at least two Secure Agents in the Secure Agent Group.

To ensure efficient execution of the assessment and conversion jobs and to prevent any memory-related performance issues, configure the memory of the PC2CDIModernizationApp agent application based on the size of the repository and PC XML. The following table provides the memory recommendations for the PC2CDIModernizationApp agent application for different configurations:

| Repository Size | PC XML ZIP Size | RAM Size (-Xmx) |
|-----------------|-----------------|-----------------|
| 200 MB          | N/A             | 1 GB (-Xmx)     |
| 1 GB            | N/A             | 1 GB (-Xmx)     |
| 4 GB            | N/A             | 4 GB (-Xmx)     |
| 9 GB            | N/A             | 5 GB (-Xmx)     |
| 200 MB          | 600 MB          | 2 GB (-Xmx)     |
| 1 GB            | 600 MB          | 2 GB (-Xmx)     |

| Repository Size | PC XML ZIP Size | RAM Size (-Xmx) |
|-----------------|-----------------|-----------------|
| 4 GB            | 600 MB          | 5 GB (-Xmx)     |
| 9 GB            | 600 MB          | 6 GB (-Xmx)     |

**Note:** The size suggested for the PC XML ZIP file is an approximate value. For example, if you have 20 XML files of 30 MB each, the approximate size of the ZIP file is 600 MB.

For information on configuring the memory for PC2CDIModernizationApp, see [“Configuring memory for Secure Agent” on page 22](#).

## Configuring memory for Secure Agent

You can configure the memory for the PC2CDIModernizationApp agent application from the Informatica Administrator service.

1. Access the Administrator service.
2. On the left navigation menu, click **Runtime Environments**.
3. On the **Runtime Environments** page, click the name of the Secure Agent that you want to configure.
4. In the upper-right corner, click **Edit**.
5. In the **System Configuration Details** area, select the **PC2CDIModernizationApp** service.
6. In the row that contains the JRE\_OPTS property, click the **Edit Agent Configuration** icon.
7. Enter the new memory value based on the recommendations available in the [“Sizing recommendations” on page 21](#) topic.
8. If you want to configure the maximum size of the file chunk to be uploaded to cloud, specify the size in MB in the FILE\_CHUNK\_SIZE property.  
Default is 30.  
**Note:** The maximum supported size for file chunk is 30MB. If you specify a value greater than 30, the value in the FILE\_CHUNK\_SIZE property is set to the default value.
9. If you want to configure the maximum buffer size, specify the size in MB in the UPLOAD\_BUFFER\_SIZE property.  
Default is 5.  
**Note:** The maximum supported buffer size for is 5MB. If you specify a value greater than 5, the value in the UPLOAD\_BUFFER\_SIZE property is set to the default value.
10. Click **Save**.  
The memory for the PC2CDIModernizationApp agent application is configured.

## CHAPTER 2

# Repository Assessment

Assess a PowerCenter repository to review the asset details within the repository along with their conversion feasibility to the cloud environment.

Before initiating the conversion of PowerCenter assets to the cloud, it is crucial to determine the feasibility of converting the assets within a PowerCenter repository. You can find out the conversion feasibility by assessing the PowerCenter repository. When you assess a repository, CDI-PC creates a backup of the PowerCenter repository, restores the backup in IDMC, and then runs the assessment. The assessment groups the assets into the following categories based on their conversion criteria:

- **Automated:** CDI-PC can convert these assets automatically. The converted assets do not need any manual intervention in Cloud Data Integration after the conversion process.
- **Partial:** CDI-PC can convert these assets to the cloud, however, you might need to do some manual tweaks on the converted Cloud Data Integration assets.
- **Manual:** Assets classified as manual conversion might require redesign of the assets because there is no direct support available for these assets in cloud. These assets cannot be migrated and needs to be created manually created on the Cloud Data Integration side.

The assessment process also generates a comprehensive report detailing the reasons behind assets being categorized as partial or manual.

## Before you begin

Before you assess a repository, perform the following steps.

1. Create a directory which is accessible from the domain machine and the secure agent. The user who started the Informatica Domain and Secure Agent must have read, write, and execute permissions on this shared directory location. Create the following folders within the shared directory location:

```
<SharedDirectoryLocation>\<DomainDisplayName>\<RepositoryName>\Templates
```

For example, if the name of the CDI-PC repository that you are going to assess is `Test_Repo` and the display name of the domain is `Test_Domain`, create the folders in the following format:

```
<SharedDirectoryLocation>\Test_Domain\Test_Repo\Templates
```

2. Collect the parameter files from your PowerCenter environment and store them in the ZIP format in the folder created in step 1.

Parameter files are the configuration files that are used for running workflows and sessions present in a repository. Parameter files are optional for assessment.

**Note:** If your version is April 2024 or newer, the file name should be `PC_Parameter.zip`. For versions older than April 2024, the file name should be `PC_PARAMETER_ZIP.zip`.

3. Create a Repoint configuration. For information on creating a Repoint configuration, see the ["Creating a Repoint configuration" on page 24](#) topic
4. Assign the Admin role to the user running the assessment. For any assistance on assigning the Admin role, contact the administrator.

## Creating a Repoint configuration

Create a replot configuration where you can define different connection endpoints to which you want to replot the assets. You can use this configuration in assessment tasks to evaluate the feasibility of replotting the assets to another endpoint.

1. On the left navigation menu, click **New**.  
The **New Asset** dialog box appears.
2. Click **Configuration**, and then click **Create**.  
The **New Configuration** page appears.
3. From the **Configuration Type** list, select **Replot Configuration**.
4. Enter a name and description for the configuration.
5. From the **Domain** list, select the domain where you want to use this configuration, and then click **Next**.
6. In the **Select Endpoints and Transformations** page, click **+**.  
You can add multiple endpoints and transformations.
7. Select a PowerCenter connection type and a cloud connection type to which you want to replot the migrated assets.
8. In the **Transformation** column, select the transformations where you want to use this replot.  
You can use the following transformations for a replot:
  - Source
  - Target
  - Lookup Transformation
  - SQL Transformation
  - Stored Procedure Transformation
9. Click **Save Configuration**.  
You can use this configuration when you assess a repository in the specified domain.

## Creating an assessment task

Create an assessment task to evaluate the conversion feasibility of the assets in the cloud environment.

Before you assess a repository, perform the following steps:

- Store the parameter file in the ZIP format in the shared directory location that you have created.



- If you want to repoint the assets to a different endpoint after migrating to the cloud, create a repoint configuration to specify the repoint parameters. For information about creating a repoint configuration, see the [“Creating a Repoint configuration” on page 24](#) topic.

The following video shows you how to create an assessment task:



1. On the left navigation menu, click **New**.  
The **New Asset** dialog box appears.
2. Click **Assessment Task**, and then click **Create**.  
The **New Assessment Task** page appears.
3. Enter the required information as shown in the following table:

| Property   | Description   |
|--|---|
| Name of the task                                       | Name of the assessment task.  |
| Assessment Task Location                               | Location in Data Integration to save the assessment tasks.  |
| Runtime Environment                                    | The name of the runtime environment where you want to run the assessment job.   |
| Description  | (Optional) Description of the assessment job.   |
| Domain   | The domain that contains the repository to be assessed.   |
| Repository Type  | Different repository types that can be assessed.<br>Currently, you can assess only a PowerCenter Repository.  |
| Repository   | Repository to be assessed.  |
| Shared Folder Location                                 | Base location of the shared folder where you copied the parameter files.<br>For example, if you have copied the configuration files to the <code>&lt;SharedDirectoryLocation&gt;\&lt;DomainDisplayName&gt;\&lt;RepositoryName&gt;\Templates</code> folder, the base location is <code>&lt;SharedDirectoryLocation&gt;\.</code>  |
| I have placed the parameter files in the shared folder | Confirm that you have copied the parameter files to the following location:<br><code>&lt;shared_folder&gt;\&lt;domain_name&gt;\&lt;repository_name&gt;\Templates</code>   |
| Analyze mapping patterns                               | Confirm to analyze the repository to identify SQL ELT patterns while performing Snowflake repointing assessment.<br>You can analyze mapping patterns on the Microsoft Azure and Amazon Web Services (AWS) PODs only.<br><b>Note:</b> To analyze mapping patterns, the Pattern Analysis license must be enabled. To enable the license, contact Informatica Global Customer Support. |

4. Select **Migrate to a different endpoint** if you want to repoint the assets to a different endpoint after migrating to the cloud.
5. Select the repoint configuration that you want to use for this assessment.

6. Click **Validate**.

CDI-PC validates if the required input files are available in the shared directory location.

On successful validation, the **Start Assessment** button is enabled.

7. Click **Start Assessment**.

An assessment job is created and the assessment process starts.

Based on the repository size, it might take several minutes to few hours for the assessment process to complete. You can monitor the status of the assessment job in the **My Jobs** page.

Additionally, CDI-PC sends an email notification after the assessment job completes.

## Re-assessing a repository

You can re-assess an already assessed repository directly from the **Explore** page.

1. On the left navigation menu, click **Explore**.
2. From the explore drop-down list, select **Repositories**.

A list of repositories available in the domains registered with CDI-PC appears.

3. Identify the repository that you want to assess.
4. Click **Assess Repository**.

Alternatively, to re-assess a previously assessed repository, click **Assess again** from the actions menu.

The **Edit Assessment Task** page appears.

5. Enter the required information as shown in the following table:

| Property                 | Description  |
|--------------------------|--|
| Name of the task         | (Optional) Name of the assessment task.  |
| Assessment Task Location | Location in Data Integration to save the assessment tasks.   |
| Runtime Environment      | The name of the runtime environment where you want to run the assessment job.                                |
| Description              | (Optional) Description of the assessment job.  |
| Domain                   | The domain that contains the repository to be assessed.  |
| Repository Type          | Different repository types that can be assessed.<br>Currently, you can assess only a PowerCenter Repository. |
| Repository               | Repository to be assessed.   |

| Property   | Description  |
|--|--|
| Shared Folder Location                                 | Base location of the shared folder where you copied the parameter files.<br>For example, if you have copied the configuration files to the <SharedDirectoryLocation>\<DomainDisplayName>\<RepositoryName>\Templates folder, the base location is <SharedDirectoryLocation>\. |
| I have placed the parameter files in the shared folder | Check box to confirm that you have copied the parameter files to the following location: <shared_folder>/<domain_name>/<repository_name>/Templates   |

6. Select **Migrate to a different endpoint** if you want to repoint the assets to a different endpoint after migrating to the cloud.
7. Select the repoint configuration that you want to use for this assessment.
8. Click **Validate**.  
CDI-PC validates if the required input files are available in the shared directory location.  
On successful validation, the **Start Assessment** button is enabled.
9. Click **Start Assessment**.  
An assessment job is created and the assessment process starts.  
Based on the repository size, it might take several minutes to few hours for the assessment process to complete. You can monitor the status of the assessment job in the **My Jobs** page.  
Additionally, CDI-PC sends an email notification after the assessment job completes.

## Accessing assessment results

Review the assessment result to understand the conversion potential of the assets and the underlying parameters contributing to the result.

After the assessment is successfully completed, you can access the assessment results on the user interface. These results provide a visual representation of the assets categorized by their potential for conversion. Assets that CDI-PC can convert automatically are indicated by the color Green, partially convertible assets are marked in Yellow, and assets requiring manual conversion are marked in Grey.

For the workflows that are marked as Partial or Manual, you can view the details of the assessment result on the user interface. Additionally, you can download an assessment report that includes detailed information on the assessment results. To learn more about the Assessment report, see the [“Assessment report” on page 30](#) topic.

In addition to the assessment report, the assessment job also generates additional output files that you can use as inputs in the conversion process. If you have chosen to analyze mapping patterns, the assessment job generates mapping analysis reports. For more information on the output files, see the [“Assessment output files” on page 28](#) topic.

1. On the left navigation menu, click **Explore**.
2. From the explore drop-down list, select **Repositories**.  
A list of repositories appears. If the assessment is successfully completed on a repository, you can see the asset categorization in a graphical view.

3. Click a repository name to view the folders inside the repository along with the assessment result for each folder.
4. For the workflows that are marked as **Partial** or **Manual**, click the corresponding **More details** link in the **Assessment Results** column.

A dialog box appears, containing information on the flags that are preventing automatic conversion of the workflow.

5. Review the report to understand the reasons preventing the automatic conversion of an asset.
6. Alternatively, to download the assessment report, click **Download Reports**.

A ZIP file is downloaded containing the assessment report. The assessment report is available in MS Excel format.

For more information about the assessment report, see [“Assessment report” on page 30](#).

## Accessing mapping analysis report

Review the CLAIRE patterns report to understand the mapping patterns in the repository.

When creating an assessment task, if you have chosen to analyze mapping patterns in the repository the task generates a pattern analysis report. After the assessment completes, you can access the report to understand the mapping pattern analysis details.

1. On the left navigation menu, click **Explore**.
2. From the explore drop-down list, select **Repositories**.  
A list of repositories appears. If the assessment is successfully completed on a repository, you can see the asset categorization in a graphical view.
3. Click a repository name to view the folders inside the repository along with the assessment result for each folder.
4. To view the mapping pattern analysis report, click **View CLAIRE patterns**.

The CLAIRE Patterns Report page appears that includes the mapping pattern analysis details of the repository. You can also download the pattern analysis report from CLAIRE Patterns Report page.

You can directly access the pattern analysis report from the list of repositories in the **Explore** page. On a repository, click **View claire patterns report** to access the analysis report.

## Assessment output files

When you download the reports for an assessment job, CDI-PC downloads a zip file containing assessment reports, log files, and configuration templates. Some of these files are used as inputs in the conversion process.

The following table contains the list of output files and their contents:

| File Name                             | User Action                 | Contents  |
|---------------------------------------|-----------------------------|---|
| <Repository_Name>_ASSESSMENT_SUMMARY  | Review                      | Review the assessment summary file to view detailed information about the assessment result. For more information on the assessment report, see the <a href="#">"Assessment report" on page 30</a> topic.   |
| Command_List.xlsx                     | Review                      | Review the <code>Command_List.xlsx</code> file to verify the commands used in the workflows.  |
| File_List.xlsx                        | Review                      | Review the <code>File_List.xlsx</code> file to verify list of flat files used in the workflows with their source and target directories.  |
| Parameter_Files.xlsx                  | Review                      | Review the <code>Parameter_Files.xlsx</code> file to verify the details of the workflow and session parameter files, such as name file name, location, and task type.   |
| Sql_List.csv                          | Review                      | Review the <code>Sql_List.csv</code> file to view the list of SQL queries used in the transformations.  |
| Xml_Pre_Processing_Configuration.xlsx | Use as input for conversion | Configure the <code>Xml_Pre_Processing_Configuration.xlsx</code> file to specify additional attributes for the conversion process, such as names for duplicate worklets, session level attributes, and connection sub type. For more information on configuring the XML Pre-processor file, see the <i>Configuring the XML Pre-processor file</i> topic.  |
| Connection_Details.xlsx               | Review                      | Review the <code>Connection_Details.xlsx</code> file to verify the list of PowerCenter connections available in the repository. If you want to migrate your assets to a different endpoint, you can create a Connection Map configuration to map the PowerCenter connections to specific cloud connections. For information on creating a Connection Map configuration, see the <i>Creating a Connection Map configuration</i> topic. |

| File Name                           | User Action                 | Contents  |
|-------------------------------------|-----------------------------|---|
| Conversion_Configuration.properties | Review                      | Review the <code>Conversion_Configuration.properties</code> file to verify the conversion properties and their default values. You can create a Conversion Properties configuration to override these default values. For information on creating a Conversion Properties configuration, see the <i>Creating a Conversion Properties configuration</i> topic. |
| MULTI_SESSION_PC2C_FILE.xlsx        | Use as input for conversion | Configure the <code>MULTI_SESSION_PC2C_FILE.xlsx</code> file to specify multi-session mappings where sessions are present across different workflows. For more information on configuring the XML Pre-processor file, see the <i>Configuring the XML Pre-processor file</i> topic.  |
| <Repository_Name>_SQL_ELT_Summary   | Review                      | Review the SQL ELT pattern summary to get a list of mapping and maplets in the repository that follow SQL ELT rules and are being repointed to Snowflake.   |

## Assessment report

The assessment report contains the detailed information about the assessment result for a repository. You can download the report from the **Repository** page.

The assessment report is generated in the XLSX format and contains the following sheets:

| Sheet Name         | Contents   |
|--------------------|--|
| Overall Summary    | Contains the repository details, domain details, asset count, and conversion rate.   |
| Connections        | Contains the list of connections used in the assessed repository with their count.   |
| Connection Repoint | Contains the repoint configuration details.  |
| Workflows          | Contains the list of workflows in the repository. This sheet also contains the list of flags responsible for manual or partial conversion of a workflow.                 |
| Workflow Sessions  | Contains the list of workflow sessions in the repository. This sheet also contains the list of flags responsible for manual or partial conversion of a workflow session. |
| Worklet Sessions   | Contains the list of worklet sessions in the repository. This sheet also contains the list of flags responsible for manual or partial conversion of a worklet session.   |

| <b>Sheet Name</b> | <b>Contents</b>  |
|-------------------|--|
| Mappings          | Contains the list of mappings in the repository. This sheet also contains the list of flags responsible for manual or partial conversion of a mapping. |
| Mapplets          | Contains the list of mapplets in the repository. This sheet also contains the list of flags responsible for manual or partial conversion of a mapplet. |

## CHAPTER 3

# Asset Conversion

You can convert your PowerCenter assets to the corresponding assets in Cloud Data Integration.

After you complete the assessment for a repository, you can start the conversion process for the workflows within the repository. Conversion is the process of migrating the PowerCenter mappings, mapplets, sessions, and workflows to Cloud Data Integration mappings, mapplets, mapping tasks, and taskflows. The conversion process uses a set of configurations to convert the assets and stores them in the specified location in Cloud Data Integration repository.

## Before you begin

Before you create a conversion task, complete the following steps:

1. Complete the assessment of the repository. For more information on assessment, see the *Repository Assessment* section.
2. Assign the required asset permissions to create or run a conversion task. For more information on the asset permissions, see the [“Asset permissions for conversion task” on page 8](#) topic.
3. Configure the `Xml_Pre_Processing_Configuration.xlsx` file to pre-process the PC XML before converting or repointing. For more information on configuring this file, see the [“Configuring the XML Pre-processor file” on page 32](#) topic.
4. Create a Connection Map configuration to map the old connection types and connection names to new connection types and connection names. For more information on creating this configuration, see the [“Creating a connection map configuration” on page 34](#) topic.
5. Create a Conversion Properties configuration to override the default conversion behavior. For more information on creating this configuration, see the [“Creating a conversion properties configuration” on page 47](#) topic.

## Configuring the XML Pre-processor file

Configure this file to specify additional attributes for the conversion process, such as names for duplicate worklets, session level attributes, and SQL queries.

1. Open the `Xml_Pre_Processing_Configuration.xlsx` file from the following location:

```
<SharedFolder>/<DomainDisplayName>/<RepositoryName>/Templates/  
Xml_Pre_Processing_Configuration.xlsx
```



2. Configure the required parameters.

The following table lists the sheets in the `Xml_Pre_Processing_Configuration.xlsx` along with the description for each sheet:

| Sheet Name                      | Description   |
|---------------------------------|---|
| DUPLICATE_WORKFLOW_WORKLET      | Contains a list of duplicate workflow and worklet combinations available in the repository. Use the DUPLICATE_WORKFLOW_WORKLET sheet to specify new names for the duplicate workflow and worklet combinations.  |
| CHANGE_TARGET_DB_TYPE           | Use the CHANGE_TARGET_DB_TYPE sheet to change the target database type during asset conversion.   |
| UPDATE_CONNECTION_SUBTYPE       | Use the UPDATE_CONNECTION_SUBTYPE sheet to specify the connection sub types for a connection.   |
| DUPLICATE_WORKLET_NAME          | Contains a list of duplicate worklets available in the repository. Use the DUPLICATE_WORKLET_NAME sheet to specify a new name for a duplicate worklet.  |
| DUPLICATE_EVENT_WAIT_TIME       | Contains a list of duplicate event wait tasks. Use the DUPLICATE_EVENT_WAIT_TIME sheet to specify new event names for the duplicate events.   |
| STANDARDIZE_RULE_INFO           | Contains a list of rules to use with business data.   |
| ADD_SESSION_LEVEL_ATTRIBUTES    | Use the ADD_SESSION_LEVEL_ATTRIBUTES sheet to update the session level properties.  |
| DUPLICATE_SESSION_INSTANCE_NAME | Contains a list of duplicate session instance names available in the repository. Use the DUPLICATE_SESSION_INSTANCE_NAME sheet to specify new names for the duplicate session instance names.   |
| CONVERT_SQL_QUERY               | Retrieves SQL details from a workflow assessment and converts the SQL queries in the specified transformations and objects to converted SQL queries for the targeted endpoint.<br><br>Use the CONVERT_SQL_QUERY sheet to fetch the SQL details from an assessment and provide the converted SQL queries for the targeted endpoint in the <code>Xml_Pre_Processing_Configuration.xlsx</code> file. |

3. Save the file.

The conversion process uses this file update specified attributes.

## CONVERT\_SQL\_QUERY

The `CONVERT_SQL_QUERY` sheet in the `Xml_Pre_Processing_Configuration.xlsx` file retrieves SQL details from an assessment and then produces converted SQL queries for the target endpoint. Use the SQL conversion configuration file in a conversion task to generate converted SQL queries for the target endpoint.

In the `CONVERT_SQL_QUERY` sheet, SQL queries are split into multiple lines for easier navigation, with each line assigned a number during the assessment. You can convert the original SQL query into the desired format. For example, you want to repoint an Oracle query to a Snowflake query. In the `CONVERT_SQL_QUERY` sheet, place the converted SQL query in the **CONVERTED\_SQL** column and run the conversion task. The conversion task updates the values as part of XML pre-processing. When you generate the converted mapping, the updated mappings are published.

You can find the `Xml_Pre_Processing_Configuration.xlsx` file in the assessment downloaded log in `TEMPLATES` folder. Update the **CONVERTED\_SQL** column with your updated queries, save the updated `Xml_Pre_Processing_Configuration.xlsx` in the `<shared_location>\Templates` folder, and then run the conversion task.

## Creating a connection map configuration

Create a Connection Map configuration to map the PowerCenter connections to IDMC connections.

The Connection Map configuration is associated with a domain and a repository. This configuration contains connection types and connection names used in the assessed repository. If you want to repoint the assets to a new endpoint, map these connections to relevant IDMC connections.

1. On the left navigation menu, click **New**.  
The **New Asset** dialog box appears.
2. Click **Configuration**, and then click **Create**.  
The **New Configuration** page appears.
3. From the **Configuration Type** list, select **Connection Map**.
4. Enter the required information as shown in the following table:

| Property    | Description   |
|-------------|---|
| Task Name   | Name of the configuration.  |
| Description | (Optional) Description of the configuration.  |
| Domain      | The domain where you want to use this configuration.<br>The list of repositories within the selected domain appears in the <b>Repository</b> field. |
| Repository  | Repository where you want to use this configuration.<br><b>Important:</b> Make sure that the selected repository is assessed.                       |

5. Click **Next**.  
On the **Set Properties** tab, the **Connection Map Configuration** section displays the list of PowerCenter connections used in the repository. You can filter the connections based on a PowerCenter connection type.
6. In the **Cloud Connection Type** and **Cloud Connection Name** columns, select the IDMC connection type and connection name of the endpoint to which you want to repoint the assets.
7. In the **Transformation** column, select the transformations where you want to use this repoint.  
You can use the following transformations for a repoint:
  - Source
  - Target
  - Lookup Transformation
  - SQL Transformation
  - Stored Procedure Transformation

8. If you want to configure additional properties for the repoint, click **Set Properties** in the **Advanced Properties** column.
9. Click **Save Configuration**.  
The configuration is saved. You can use this configuration in conversion tasks.

## Advanced properties

If you are repointing your assets to another endpoint, you can configure additional properties in the Connection Map configuration.

Based on the IDMC connection that you choose for repoint, you can configure the properties specific to that connection.

### Amazon Redshift advanced properties

The following tables lists the Amazon Redshift properties that you can configure for a **Connection Map configuration**:

#### Object properties

The following table describes the Amazon Redshift connection properties:

| Connection property | Description   |
|---------------------|---|
| Schema              | The Amazon Redshift schema name to be used when creating the object. Th schema name is similar to the schema name specified in the <code>SCHEMAMAP.properties</code> file.<br>Default is <code>schema_changeit</code> . |

#### Source advanced properties

The following table describes the Amazon Redshift source advanced properties:

| Property name  | Description   |
|----------------|---|
| Schema Name    | Overrides the default schema name.  |
| S3 Bucket Name | Amazon S3 bucket name for staging the data.<br>You can also specify the bucket name with the folder path. If you provide an Amazon S3 bucket name that is in a different region than the Amazon Redshift cluster, you must configure the <code>REGION</code> attribute in the Unload command options. |

## Target advanced properties

The following table describes the Amazon Redshift target advanced properties:

| Property Name  | Description  |
|----------------|--|
| Schema Name    | Overrides the default schema name.   |
| S3 Bucket Name | Amazon S3 bucket name for writing the files to Amazon Redshift target. You can also specify the bucket name with the folder path. If you provide an Amazon S3 bucket name that is in a different region than the Amazon Redshift cluster, you must configure the REGION attribute in the Copy command options. |

## Lookup advanced properties

The following table describes the Amazon Redshift lookup transformation advanced properties:

| Property Name  | Description   |
|----------------|---|
| Schema Name    | Overrides the default schema name.  |
| S3 Bucket Name | Amazon S3 bucket name for staging the data. You can also specify the bucket name with the folder path. If you provide an Amazon S3 bucket name that is in a different region than the Amazon Redshift cluster, you must configure the REGION attribute in the Copy command options. |

## Databricks Delta advanced properties

The following tables lists the Databricks Delta properties that you can configure for a **Connection Map configuration**:

### Object properties

The following table describes the Databricks Delta connection properties:

| Connection property | Description   |
|---------------------|---|
| Schema              | The Databricks Delta schema name to be used when creating the object. Th schema name is similar to the schema name specified in the <code>SCHEMAMAP.properties</code> file. Default is <code>schema_changeit</code> . |

## Source advanced properties

The following table describes the Databricks Delta source advanced properties:

| Property name    | Description  |
|------------------|--|
| Schema Name      | Overrides the schema specified in the connection.<br>Default is <code>\$\$dbd_schema</code> .  |
| Staging Location | Relative directory path to store the staging files.<br>If the Databricks cluster is deployed on AWS, use the path relative to the Amazon S3 staging bucket.<br>If the Databricks cluster is deployed on Azure, use the path relative to the Azure Data Lake Store Gen2 staging filesystem name.<br>Default is <code>\$\$dbd_staging_loc</code> . |

## Target advanced properties

The following table describes the Databricks Delta target advanced properties:

| Property Name    | Description  |
|------------------|--|
| Schema Name      | Overrides the schema specified in the connection.<br>Default is <code>\$\$dbd_schema</code> .  |
| Staging Location | Relative directory path to store the staging files.<br>If the Databricks cluster is deployed on AWS, use the path relative to the Amazon S3 staging bucket.<br>If the Databricks cluster is deployed on Azure, use the path relative to the Azure Data Lake Store Gen2 staging filesystem name.<br>Default is <code>\$\$dbd_staging_loc</code> . |

## Lookup advanced properties

The following table describes the Databricks Delta lookup transformation advanced properties:

| Property Name    | Description  |
|------------------|--|
| Schema Name      | Overrides the schema specified in the connection.<br>Default is <code>\$\$dbd_schema</code> .  |
| Staging Location | Relative directory path to store the staging files.<br>If the Databricks cluster is deployed on AWS, use the path relative to the Amazon S3 staging bucket.<br>If the Databricks cluster is deployed on Azure, use the path relative to the Azure Data Lake Store Gen2 staging filesystem name.<br>Default is <code>\$\$dbd_staging_loc</code> . |

## Google BigQuery advanced properties

The following table lists the Google BigQuery properties that you can configure for a **Connection Map configuration**:

### Object properties

The following table describes the Google BigQuery connection properties:

| Connection property | Description   |
|---------------------|---|
| Source Dataset ID   | Name of the dataset that contains the source table and target table that you want to connect to.<br>Default is <code>datasetID_changeit</code> .<br><b>Note:</b> Google BigQuery supports the datasets that reside only in the US region. |

### Source advanced properties

The following table describes the Google BigQuery source advanced properties:

| Property name                | Description  |
|------------------------------|--|
| Source Dataset ID            | Overrides the Google BigQuery dataset name that you specified in the connection.<br>Default is <code>\$\$sf_database</code> .  |
| Source Staging Dataset       | Overrides the Google BigQuery staging dataset name that you specified in the connection and the Source Dataset ID source advanced property.  |
| Allow Large Results          | Determines whether Google BigQuery Connector must produce arbitrarily large result tables to query large source tables. If you select this option, you must specify a destination table to store the query results.<br>Default is false.   |
| Job Poll Interval In Seconds | The number of seconds after which Google BigQuery Connector polls the status of the read job operation.<br>Default is 10.  |
| Read Mode                    | Specifies the read mode to read data from the Google BigQuery source.<br>You can select one of the following read modes: <ul style="list-style-type: none"><li>- Direct. In direct mode, Google BigQuery Connector reads data directly from the Google BigQuery source table.<br/>When you use hybrid and complex connection mode, you cannot use direct mode to read data from the Google BigQuery source.</li><li>- Staging. In staging mode, Google BigQuery Connector exports data from the Google BigQuery source into Google Cloud Storage. After the export is complete, Google BigQuery Connector downloads the data from Google Cloud Storage into the local stage file and then reads data from the local stage file.</li></ul> Default is Staging mode. |

| Property name                                   | Description  |
|---|--|
| Use EXPORT DATA Statement to stage              | <p>Uses the EXPORT DATA statement to export data from Google BigQuery to Google Cloud Storage.</p> <p>If the query contains an ORDER BY clause, the specified order is maintained when you export the data.</p> <p>This property applies to staging mode.</p> <p>Default is false.</p>   |
| Number of Threads for Downloading Staging Files | <p>Specifies the number of files that Google BigQuery Connector downloads at a time to enable parallel download.</p> <p>This property applies to staging mode.</p> <p>Default is 1.</p>  |
| Local Stage File Directory                      | <p>Specifies the directory on your local machine where Google BigQuery Connector stores the Google BigQuery source data temporarily before it reads the data.</p> <p>This property applies to staging mode.</p> <p>Default is <code>\$PMTempDir</code>.</p>  |
| Data format of the staging file                 | <p>Specifies the data format of the staging file. You can select one of the following data formats:</p> <ul style="list-style-type: none"> <li>- JSON (Newline Delimited). Supports flat and record data with nested and repeated fields.</li> <li>- CSV. Supports flat data.</li> </ul> <p>In a .csv file, columns of the Timestamp data type are represented as floating point numbers that cause the milliseconds value to differ.</p> <p>Default is <code>JSON</code>.</p>   |
| Enable Staging File Compression                 | <p>Indicates whether to compress the size of the staging file in Google Cloud Storage before Google BigQuery Connector reads data from the staging file.</p> <p>You can enable staging file compression to reduce cost and transfer time.</p> <p>This property applies to staging mode.</p> <p>Default is false.</p>   |
| Retry Options                                   | <p>Comma-separated list to specify the following retry options:</p> <ul style="list-style-type: none"> <li>- Retry Count. The number of retry attempts to read data from Google BigQuery.</li> <li>- Retry Interval. The time in seconds to wait between each retry attempt.</li> <li>- Retry Exceptions. The list of exceptions separated by pipe ( ) character for which the retries are made.</li> </ul> <p>Default is <code>\$\$gbq_retry_options</code>.</p>  |
| Use Legacy SQL for SQL Override                 | <p>Indicates that the SQL Override query is specified in legacy SQL.</p> <p>Use the following format to specify a legacy SQL query for the <b>SQL Override Query</b> property:</p> <pre>SELECT &lt;Col1, Col2, Col3&gt; FROM [projectID:datasetID.tableName]</pre> <p>Clear this option to define a standard SQL override query.</p> <p>Use the following format to specify a standard SQL query for the <b>SQL Override Query</b> property:</p> <pre>SELECT * FROM `projectID.datasetID.tableName`</pre> <p>Default is false.</p> |

## Target advanced properties

The following table describes the Google BigQuery target advanced properties:

| Property name                   | Description  |
|---------------------------------|--|
| Target Dataset ID               | Overrides the Google BigQuery dataset name that you specified in the connection.<br>Default is <code>\$\$gbq_datasetID</code> .  |
| Write Mode                      | Specifies the mode to write data to the Google BigQuery target.<br>You can select one of the following modes: <ul style="list-style-type: none"><li>- Bulk. Google BigQuery V2 Connector first writes the data to a staging file in Google Cloud Storage. When the staging file contains all the data, Google BigQuery V2 Connector loads the data from the staging file to the BigQuery target. Google BigQuery V2 Connector then deletes the staging file unless you configure the task to persist the staging file.</li><li>- Streaming. Google BigQuery V2 Connector directly writes data to the BigQuery target. Google BigQuery V2 Connector writes the data into the target row by row.</li><li>- CDC. Applies only when you capture changed data from a CDC source. In CDC mode, Google BigQuery V2 Connector captures changed data from any CDC source and writes the changed data to a Google BigQuery target table.</li></ul> Default is Bulk mode. |
| Data format of the staging file | Specifies the data format of the staging file. You can select one of the following data formats: <ul style="list-style-type: none"><li>- Avro</li><li>- JSON (Newline Delimited). Supports flat and record data with nested and repeated fields.</li><li>- Parquet</li><li>- CSV. Supports flat data.</li></ul> In a .csv file, columns of the Timestamp data type are represented as floating point numbers that cause the milliseconds value to differ.<br>Only JSON format is applicable for mappings in advanced mode.<br>This property applies to bulk and CDC mode.<br>Avro and parquet format is not applicable when you perform a data driven operation.<br>Default is <code>JSON</code> .   |
| Enable Staging File Compression | Select this option to compress the size of the staging file before Google BigQuery writes the data to the Google Cloud Storage and decompress the staging file before it loads the data to the Google BigQuery target.<br>You can enable staging file compression to reduce cost and transfer time.<br>Default is <code>false</code> .   |
| Local Stage File Directory      | Specifies the directory on your local machine where Google BigQuery V2 Connector stores the files temporarily before writing the data to the staging file in Google Cloud Storage.<br>This property applies to bulk mode.<br>Default is <code>\$PMTempDir</code> .   |
| Use Default Column Values       | Applicable when the selected data format for the staging file is CSV when the mapping contains unconnected ports. Includes the default column values for the unconnected port from the staging file to create the target. This is applicable when you have defined the default constraint value in the Google BigQuery source column. When you do not enable this option, the agent creates a target only with the connected ports. The agent populates null or empty strings for unconnected ports.<br>Default is <code>true</code> .   |



## Lookup advanced properties

The following table describes the Google BigQuery lookup transformation advanced properties:

| Property name                                   | Description   |
|---|---|
| Source Dataset ID                               | Overrides the Google BigQuery dataset name that you specified in the connection.<br>Default is <code>\$\$gbq_datasetID</code> .   |
| Source Staging Dataset                          | Overrides the Google BigQuery staging dataset name that you specified in the Lookup transformation.   |
| Allow Large Results                             | Determines whether Google BigQuery V2 Connector creates arbitrarily large result tables to query large source tables.<br>If you select this option, you must specify a destination table to store the query results.<br>Default is <code>false</code> .   |
| Job Poll Interval In Seconds                    | The number of seconds after which Google BigQuery V2 Connector polls the status of the read job operation.<br>Default is <code>10</code> .  |
| Read Mode                                       | Specifies the read mode to read data from the Google BigQuery source.<br>You can select one the following read modes: <ul style="list-style-type: none"><li>- Direct. In direct mode, Google BigQuery V2 Connector reads data directly from the Google BigQuery source table.<br/>When you use hybrid and complex connection mode, you cannot use direct mode to read data from the Google BigQuery source.</li><li>- Staging. In staging mode, Google BigQuery V2 Connector exports data from the Google BigQuery source into Google Cloud Storage. After the export is complete, Google BigQuery V2 Connector downloads the data from Google Cloud Storage into the local stage file and then reads data from the local stage file.</li></ul> Default is <code>Staging</code> mode. |
| Use EXPORT DATA Statement to stage              | Uses the EXPORT DATA statement to export data from Google BigQuery to Google Cloud Storage.<br>If the query contains an ORDER BY clause, the specified order is maintained when you export the data.<br>This property applies to staging mode.<br>Default is <code>true</code> .  |
| Number of Threads for Downloading Staging Files | Specifies the number of files that Google BigQuery Connector downloads at a time to enable parallel download.<br>This property applies to staging mode.<br>Default is <code>1</code> .  |
| Local Stage File Directory                      | Specifies the directory on your local machine where Google BigQuery V2 Connector stores the Google BigQuery source data temporarily before it reads the data.<br>This property applies to staging mode.<br>Default is <code>\$PMTempDir</code> .  |

| Property name                   | Description  |
|---------------------------------|--|
| Data format of the staging file | <p>Specifies the data format of the staging file. You can select one of the following data formats:</p> <ul style="list-style-type: none"> <li>- Avro</li> <li>- JSON (Newline Delimited). Supports flat and record data with nested and repeated fields.</li> <li>- Parquet</li> <li>- CSV. Supports flat data.</li> </ul> <p>In a .csv file, columns of the Timestamp data type are represented as floating point numbers that cause the milliseconds value to differ.</p> <p>Only JSON format is applicable for mappings in advanced mode.</p> <p>This property applies to bulk and CDC mode.</p> <p>Avro and parquet format is not applicable when you perform a data driven operation.</p> <p>Default is <code>JSON</code>.</p> |
| Enable Staging File Compression | <p>Indicates whether to compress the size of the staging file in Google Cloud Storage before Google BigQuery V2 Connector reads data from the staging file.</p> <p>You can enable staging file compression to reduce cost and transfer time.</p> <p>This property applies to staging mode.</p> <p>Default is <code>false</code>.</p>   |
| Retry Options                   | <p>Comma-separated list to specify the following retry options:</p> <ul style="list-style-type: none"> <li>- Retry Count. The number of retry attempts to read data from Google BigQuery.</li> <li>- Retry Interval. The time in seconds to wait between each retry attempt.</li> <li>- Retry Exceptions. The list of exceptions separated by pipe ( ) character for which the retries are made.</li> </ul> <p>Default is <code>\$\$gbq_retry_options</code>.</p>  |
| Use Legacy SQL for SQL Override | <p>Indicates that the SQL Override query is specified in legacy SQL.</p> <p>Use the following format to specify a legacy SQL query for the SQL Override Query property:</p> <pre>SELECT &lt;Col1, Col2, Col3&gt; FROM [projectID:datasetID.tableName]</pre> <p>Clear this option to define a standard SQL override query.</p> <p>Use the following format to specify a standard SQL query for the SQL Override Query property:</p> <pre>SELECT * FROM 'projectID.datasetID.tableName'</pre>  |

## Microsoft Azure Synapse SQL advanced properties

The following tables lists the Microsoft Azure Synapse SQL properties that you can configure for a **Connection Map configuration**:

### Object properties

The following table describes the Microsoft Azure Synapse SQL connection properties:

| Connection property | Description   |
|---------------------|---|
| Schema              | <p>The Microsoft Azure Synapse SQL schema name to be used when creating the object. Th schema name is similar to the schema name specified in the <code>SCHEMAPAP.properties</code> file.</p> <p>Default is <code>schema_changeit</code>.</p> |

## Source advanced properties

The following table describes the Microsoft Azure Synapse SQL source advanced properties:

| Property name             | Description   |
|---------------------------|---|
| Schema Name Override      | Overrides the schema specified in the connection.<br>Default is <code>\$\$syn_schema</code> .   |
| Azure Blob Container Name | The name of the container in Microsoft Azure Blob Storage. The container name must not contain special characters.<br>Default is <code>\$\$blob_container_name</code> .   |
| ADLS FileSystem Name      | Required if you select ADLS Gen2 storage in the connection properties.<br>The name of the file system in Microsoft Azure Data Lake Storage Gen2.<br>The file system name must not contain special characters. You can also specify the path of the directory under the file system. Use only a forward slash to specify the directory path.<br>Default is <code>\$\$adls_folder_name</code> . |

## Target advanced properties

The following table describes the Microsoft Azure Synapse SQL target advanced properties:

| Property name             | Description   |
|---------------------------|---|
| Schema Name Override      | Overrides the schema specified in the connection.<br>Default is <code>\$\$syn_schema</code> .   |
| Azure Blob Container Name | The name of the container in Microsoft Azure Blob Storage. The container name must not contain special characters.<br>Default is <code>\$\$blob_container_name</code> .   |
| ADLS FileSystem Name      | Required if you select ADLS Gen2 storage in the connection properties.<br>The name of the file system in Microsoft Azure Data Lake Storage Gen2.<br>The file system name must not contain special characters. You can also specify the path of the directory under the file system. Use only a forward slash to specify the directory path.<br>Default is <code>\$\$adls_folder_name</code> . |

## Lookup advanced properties

The following table describes the Microsoft Azure Synapse SQL lookup transformation advanced properties:

| Property name             | Description   |
|---------------------------|---|
| Schema Name Override      | Overrides the schema specified in the connection.<br>Default is <code>\$\$syn_schema</code> .   |
| Azure Blob Container Name | The name of the container in Microsoft Azure Blob Storage. The container name must not contain special characters.<br>Default is <code>\$\$blob_container_name</code> .   |
| ADLS FileSystem Name      | Required if you select ADLS Gen2 storage in the connection properties.<br>The name of the file system in Microsoft Azure Data Lake Storage Gen2.<br>The file system name must not contain special characters. You can also specify the path of the directory under the file system. Use only a forward slash to specify the directory path.<br>Default is <code>\$\$adls_folder_name</code> . |

## PostgreSQL advanced properties

The following tables lists the PostgreSQL properties that you can configure for a **Connection Map configuration**:

### Object properties

The following table describes the PostgreSQL connection properties:

| Connection property | Description  |
|---------------------|--|
| Schema              | The PostgreSQL schema name to be used when creating the object. Th schema name is similar to the schema name specified in the <code>SCHEMAMAP.properties</code> file.<br>Default is <code>schema_changeit</code> . |

### Source advanced properties

The following table describes the PostgreSQL source advanced properties:

| Property name | Description  |
|---------------|--|
| Schema Name   | Overrides the schema name of the source object.<br>Default is <code>\$\$pg_schema</code> . |

### Target advanced properties

The following table describes the PostgreSQL target advanced properties:

| Property name | Description  |
|---------------|--|
| Schema Name   | Overrides the schema name of the target object.<br>Default is <code>\$\$pg_schema</code> . |

## Lookup advanced properties

The following table describes the PostgreSQL lookup transformation advanced properties:

| Property name | Description  |
|---------------|--|
| Schema Name   | Overrides the schema name of the lookup object.<br>Default is <code>\$\$pg_schema</code> . |

## Snowflake advanced properties

The following tables lists the Snowflake properties that you can configure for a **Connection Map configuration**:

### Object properties

The following table describes the Snowflake connection properties:

| Connection property | Description   |
|---------------------|---|
| Database            | The Snowflake database name to be used when creating the object. The database name similar to the database name specified in the <code>DATABASEMAP.properties</code> file.<br>Default is <code>dbname_changeit</code> . |
| Schema              | The Snowflake schema name to be used when creating the object. Th schema name is similar to the schema name specified in the <code>SCHEMAMAP.properties</code> file.<br>Default is <code>schema_changeit</code> .       |

**Note:** Specify the parameters in the following format: `<database name>/<schema name>` You must specify both the database and schema name. If you specify only the database name, source objects do not appear in the Select Source Object window. If you specify only the schema name, an `Invalid Schema` exception occurs while reading data.

### Source advanced properties

The following table describes the Snowflake source advanced properties:

| Property name | Description  |
|---------------|--|
| Database      | Overrides the database specified in the connection.<br>Default is <code>\$\$sf_database</code> . |
| Schema        | Overrides the schema specified in the connection.<br>Default is <code>\$\$sf_schema</code> .     |
| Warehouse     | Overrides the Snowflake warehouse name specified in the connection.                              |
| Role          | Overrides the Snowflake role assigned to user you specified in the connection.                   |

## Target advanced properties

The following table describes the Snowflake target advanced properties:

| Property Name                       | Description  |
|-------------------------------------|--|
| Database                            | Overrides the database that you used to import the object.<br>Default is <code>\$\$\$sf_database</code> .  |
| Schema                              | Overrides the schema that you used to import the object.<br>Default is <code>\$\$\$sf_schema</code> .  |
| Warehouse                           | Overrides the Snowflake name specified in the connection. The warehouse name in the mapping overrides the warehouse name you specify in the connection.  |
| Role                                | Overrides the Snowflake role assigned to the user specified in the connection.   |
| Batch Row Size                      | The number of rows written to a single file in the agent location. When the number of rows written to the file reaches the value specified, the agent flushes the data queue and starts processing the write commands.   |
| Number of local staging files       | The number of files that represents a single batch of data.<br>The default number of files considered is 64.<br>After the agent uploads the specified number of local staging files to the Snowflake user stage, Snowflake unloads the data to the target table. |
| Additional Write Runtime Parameters | The additional runtime parameters that you can use when you write to Snowflake.<br>You can enter multiple write runtime parameters, separated by ampersand (&).  |
| Rejected File Path                  | The filename and path of the file on the agent machine where you want to write the rejected records.<br>For example, <code>\rejectedfiles\reject7</code>   |
| Forward Rejected Rows               | Determines whether the transformation passes rejected rows to the next transformation or drops rejected rows. By default, the agent forwards rejected rows to the next transformation.   |

## Lookup advanced properties

The following table describes the Snowflake lookup transformation advanced properties:

| Property Name | Description  |
|---------------|--|
| Database      | Overrides the database specified in the connection.<br>Default is <code>\$\$\$sf_database</code> . |
| Schema        | Overrides the schema specified in the connection.<br>Default is <code>\$\$\$sf_schema</code> .     |
| Warehouse     | Overrides the Snowflake warehouse name specified in the connection.                                |
| Role          | Overrides the Snowflake role assigned to user you specified in the connection.                     |

# Creating a conversion properties configuration

Create a Conversion Properties configuration if you want to override the default conversion behavior.

The Conversion Properties configuration contains the basic and advanced conversion properties. You can configure these properties to override the default conversion behavior.

1. On the left navigation menu, click **New**.  
The **New Asset** dialog box appears.
2. Click **Configuration**, and then click **Create**.  
The **New Configuration** page appears.
3. From the **Configuration Type** list, select **Conversion Properties**.
4. Enter the required information as shown in the following table:

| Property           | Description  |
|--------------------|--|
| Configuration Name | Name of the configuration.                           |
| Description        | (Optional) Description of the configuration.         |
| Domain             | The domain where you want to use this configuration. |

5. Click **Next**.  
The **Basic Properties** tab appears.
6. Configure the required properties.  
The following table contains the list of basic properties that you can configure:

| Property                               | Default value | Description   |
|--|---------------|---|
| Preprocessor File Location             | -             | Location of the XML Pre-processor file that contains additional attributes for the conversion process, such as names for duplicate worklets, session level attributes, and connection sub types.<br>For information about configuring this file, see the <a href="#">"Configuring the XML Pre-processor file" on page 32</a> topic. |
| Skip Session Log File Name             | True          | Determines whether you want to skip the conversion of the SessionLogFileName property based on the value specified in the PC.xml file.  |
| Append Run ID to Session Log File Name | False         | Determines whether you want to append the SessionLogFileName property to the run ID. If you enable the property, it takes precedence over the Skip Session Log File Name property.  |
| Treat Null as Zero                     | False         | Determines whether you want to set the default value as 0 for all numeric aggregators.  |
| Enable High Precision                  | False         | Determines whether you want to enable high precision for decimal data types.  |

| Property                  | Default value | Description   |
|---------------------------|---------------|---|
| Retain Direct Connections | False         | Determines whether you want to convert the transformations that have a direct connection in PowerCenter to a direct connection in IDMC. |
| Reuse Dependent Assets    | True          | Reuse existing dependent assets while publishing the converted assets instead of overwriting the assets.                                |

- (Optional) To configure additional properties, click **Next**.  
The **Advanced Properties** tab appears.
- Click **+** and configure the advanced properties as required.  
Contact Informatica Global Customer Support for the list of supported advanced properties.  
**Note:** Informatica recommends that you consult the Informatica Global Customer Support team before you configure the advanced properties.
- Click **Save Configuration**.  
You can use this configuration in conversion tasks.

## Creating a parameter file conversion task

Create a parameter file conversion task to convert PowerCenter parameter files to Cloud Data Integration parameter files.

Before you create a parameter file conversion task, make sure that all the necessary permissions are assigned to your role. For information on assigning the required permissions, see the *Asset Permissions* topic.

- On the left navigation menu, click **New**.  
The **New Asset** dialog box appears.
- Click **Parameter File Conversion Task**, and then click **Create**.  
The **New Parameter File Conversion Task** page appears.  
Parameter file conversion tasks are not associated with a repository or domain.
- Enter the required information as shown in the following table:

| Property      | Description  |
|---------------|--|
| Task Name     | Name of the parameter file conversion task.  |
| Description   | (Optional) Description of the conversion task.   |
| Task Location | Click <b>Browse</b> , and select the project or folder location where you want to create the parameter file conversion task. |



| Property                            | Description  |
|-------------------------------------|--|
| Project Name                        | The Data Integration project name that you want to append to the CDI parameter file. The parameter scopes inside a CDI parameter file start with a project name. The selected project name will be appended to the parameter scopes inside the CDI parameter file.   |
| Runtime Environment                 | The name of the runtime environment where you want to run the task.  |
| PowerCenter Parameter File Location | Location of the PowerCenter parameter file that you want to convert. Make sure that the location is accessible from the Secure Agent.<br>The location must contain the file name and extension (.ZIP). Make sure that the Secure Agent user has read, write, and execute access to this location and the ZIP file contains the PowerCenter parameter files.  |
| Conversion Input File Location      | Location of the conversion input file.<br>The conversion input file template is available in the following location:<br><code>downloads/package-PC2CDIModernizationApp.&lt;latest_version&gt;/package/templates/ParameterFileConversionInput.xlsx</code><br>Configure this file to map the PowerCenter parameter and connection names to the Data Integration parameter and connection names. Save the template in a shared directory which is accessible from the Secure Agent. |

4. Click **Validate Locations**.

On successful validation, you can save the task.

5. Do one of the following:

- Click **Save and Close** to save the parameter file conversion task.
- Click **Save and Run** to save the parameter file conversion task and run it immediately.

The parameter file conversion task is created. You can view the list of conversion tasks in the **Explore > All Tasks** page. Use the **Type** filter to filter and view all the available conversion tasks.

**Note:** A parameter file is a list of parameters and variables and their associated values. These values define properties for PowerCenter mappings, mapplets, sessions, and workflows. The conversion task applies these values when you run a mapping that uses the parameter file.

## Creating a workflow conversion task

Create a workflow conversion task to specify the workflows that you want to convert to Cloud Data Integration.

The following video shows you how to create a workflow conversion task:



1. On the left navigation menu, click **New**.  
The **New Asset** dialog box appears.
2. Click **Workflow Conversion Task**, and then click **Create**.  
The **New Workflow Conversion Task** page appears.

Alternatively, click the action menu of the repository to create or run a conversion task, and click **Convert Assets**.

**Note:** You can only convert the workflows whose assessment result is Automated or Partial. For the workflows whose assessment result is Manual, you need to convert them manually.

3. Enter the required information as shown in the following table:

| Property                            | Description  |
|-------------------------------------|--|
| Name of the task                    | Name of the workflow conversion task.  |
| Conversion Task Location            | Click <b>Browse</b> and select the project or folder where you want to create the conversion task asset definition.<br><b>Note:</b> Make sure that you have write access to the specified location.  |
| Runtime Environment                 | The runtime environment that you want to use for creating the default connections during the conversion process.   |
| Description                         | (Optional) Description of the conversion task.   |
| Domain                              | The domain that contains the repository to be converted. From the <b>Domain</b> list, select the domain where you want to use this configuration.  |
| Repository                          | Repository to be converted. Select the repository where you want to use this configuration.<br><b>Note:</b> Make sure that the selected repository is assessed.  |
| Conversion Properties Configuration | Conversion properties configuration that you want to use for the task. If you want to override the default conversion behavior, select the required conversion properties configuration.   |
| Connection Map Configuration        | Connection map configuration that you want to use for the task. If you want to repoint the assets to another endpoint, select the required connection map configuration.<br>You can also provide connection map and the parameter files in the ZIP format. If a connection exists in the parameter ZIP file, the existing connection will be reused. |

4. Click **Next**.

The **Select Folder** tab displays the list of folders available in the selected repository.

5. Click the folder name that contains the assets you want to convert, and click **Next**.

The **Select Workflows** tab displays the list of workflows available inside the folder.

6. Click **Next**.

The list of workflows that are added to the conversion task appears.

7. Verify the workflows.

If required, you can select and remove a workflow.

8. Do one of the following:

- Click **Save and Close** to save the conversion task.
- Click **Save and Run** to save the conversion task and run it immediately.

The conversion task is created. You can view the list of conversion tasks in the **Explore > All Tasks** page. Use the **Type** filter to filter and view all the available conversion tasks.

# Modifying a conversion task

Modify a task if you want to remove the workflows that you added for conversion, change the configurations, or change the runtime environment where you want to run the conversion job.

1. On the left navigation menu, click **Explore**.
2. From the explore drop-down list, select **All Tasks**.  
A list of all the assessment, parameter file conversion, and workflow conversion tasks appears.
3. Click the task that you want to edit.  
The **Task Details** page appears.
4. Click the edit icon to edit the task.
5. Do one of the following:
  - Click **Save and Close** to save the conversion task.
  - Click **Save and Run** to save the conversion task and run it immediately.

The conversion task is saved. You can view the list of conversion tasks in the **Explore > All Tasks** page. Use the **Type** filter to filter and view all the available conversion tasks.

# Running a conversion task

Run a conversion task to start the conversion process.

1. On the left navigation menu, click **Explore**.
  2. From the explore drop-down list, select **All Tasks**.  
A list of all the assessment, parameter file conversion, and workflow conversion tasks appears.
  3. Click the **Actions** menu of the row of the conversion task and click **Run**.  
The conversion task starts running. You can track the progress of the job in the **My Jobs** page.
  4. If you want to view the conversion task details before running, perform the following steps:
    - a. Click the conversion task that you want to run.  
The conversion task details appear.
    - b. Verify the task details, and then click **Run**.  
The conversion task starts running. You can track the progress of the job in the **My Jobs** page.
- Additionally, CDI-PC sends an email notification after the conversion job completes.

# Deleting a conversion task

You can delete a conversion task if it is no longer required.

1. On the left navigation menu, click **Explore**.
2. From the explore drop-down list, select **All Tasks**.  
A list of all the assessment, parameter file conversion, and workflow conversion tasks appears.

3. Click the **Actions** menu of the row of the conversion task and click **Delete**.  
A warning message appears.
4. Click **Yes, delete** to confirm the deletion.  
The conversion task is deleted.
5. If you want to view the conversion task details before deleting, perform the following steps:
  - a. Click the conversion task that you want to delete.  
The conversion task details appear.
  - b. Verify the task details, and then click the delete icon.  
A warning message appears.
  - c. Click **Yes, delete** to confirm the deletion.  
The conversion task is deleted.

# CHAPTER 4

## Bulk Metadata Update

Update the metadata of multiple assets in a single operation.

After you convert and migrate the PowerCenter assets to the Cloud Data Integration assets, you can update the metadata of the assets to ensure that the assets function seamlessly in the cloud environment. You can create bulk update tasks to update the metadata of mapping and taskflow asset types.

The bulk update process also generates a comprehensive report that includes a list of assets that are submitted for update and the metadata update status.

### Mapping asset metadata

The following table describes the metadata types and the corresponding details you can update using a bulk update task:

| Metadata Type       | Details   |
|---------------------|---|
| Field details       | Field name, native type, precision, scale, platform type, default value, and expression.                              |
| Advanced properties | Value of mapping properties.  |
| Connection details  | Object name, multiple matches, filter, truncate, lookup condition, and data driven condition.                         |
| In-out parameters   | Description, data type, precision, scale, expression variable, default value, retention policy, and aggregation type. |
| Mapping SQL queries | SQL queries of the assets.  |

### Taskflow asset metadata

The following table describes the task types and the corresponding details you can update using a bulk update task:

| Task Type       | Details   |
|-----------------|---|
| Assignment task | Field, type, and value.   |
| Command task    | Type and value.   |
| Data task       | Preference to suspend taskflow execution when a warning, error, or failure is encountered or when the data task is not run. |

| Task Type     | Details  |
|---------------|--|
| Decision task | Field, condition, and value.   |
| Email task    | Input type and value of the subject, content, body, to, and cc parameters. |

## Before you begin

The steps you must complete before bulk updating assets metadata.

Before you create a bulk update task, complete the following steps:

1. Complete the conversion of the assets. For more information, see [#unique\\_27/unique\\_27\\_Connect\\_42\\_GUID-23C83356-8E09-4ECA-A67A-CF00C885784Don page 0](#).
2. Assign the required asset permissions to create and run a bulk update task. For more information on the asset permissions, see [“Asset permissions for bulk update task” on page 10](#).

## Updating assets metadata

Create bulk update tasks to update the metadata of the assets you have converted and migrated to the cloud environment.

Updating the metadata of assets is a two-step process that includes exporting the existing metadata of the converted assets, and then importing new metadata to update the assets. To update the metadata of assets, perform the following steps:

1. Export the existing metadata of the converted assets. Create a bulk update task to perform an export metadata operation. For more information, see [“Exporting assets metadata” on page 54](#).
2. Import new metadata to update the assets. Create a bulk update task to upload new metadata and update the assets. For more information, see [“Importing assets metadata” on page 55](#).

### Exporting assets metadata

Export the existing metadata of the assets as an Excel template file.

Before you create a bulk update task, ensure that your role has all the necessary permissions. For information on assigning the required permissions, see *Asset Permissions*.

Create a bulk update task to export the metadata of the assets you have converted and migrated to the cloud platform.

1. On the left navigation menu, click **New**.  
The **New Asset** dialog box appears.
2. Click **Bulk Update Task**, and then click **Create**.  
The **New Bulk Update Task** page appears.

3. The following table describes the properties that you need to configure:

| Property              | Description  |
|-----------------------|--|
| Bulk Update Operation | Type of bulk update operation you want to perform. Select <b>Export Metadata</b> to export the metadata of the assets.   |
| Asset Type            | Type of assets you want to update.   |
| Task Name             | Name of the bulk update task.  |
| Description           | (Optional) Description of the bulk update task.  |
| Task Location         | Click <b>Browse</b> , and select the project or folder location where you want to create the bulk update task.   |
| Project/Folder        | Project or folder that contains the assets for bulk update. Select a project and up to 5 folders in the project. To choose a different project or folder, uncheck the selected values. |
| Operation             | The type of metadata you want to export and update the assets. For more information, see the <i>Bulk update overview</i> topic.  |

4. Click **Next**.

Review the task details before you save and run the task.

5. Do one of the following:

- Click **Save and Close** to save the bulk update task.
- Click **Save and Run** to save and run the bulk update task.

The bulk update task is created. You can view the list of bulk update tasks in the **Explore > All Tasks** page. Use the **Type** filter to filter and view all the available bulk update tasks.

## Importing assets metadata

Create a bulk update task to export the metadata of the assets you have converted and migrated to the cloud platform.

Before you create a bulk update task, ensure that your role has all the necessary permissions. For information on assigning the required permissions, see *Asset Permissions*.

1. On the left navigation menu, click **New**.  
The **New Asset** dialog box appears.
2. Click **Bulk Update Task**, and then click **Create**.  
The **New Bulk Update Task** page appears.

- The following table describes the properties that you need to configure:

| Property               | Description  |
|------------------------|--|
| Bulk Update Operation  | Type of bulk update operation you want to perform. Select <b>Update Metadata</b> to update the metadata of the assets.   |
| Task Name              | Name of the bulk update task.  |
| Description            | Optional. Description of the bulk update task.   |
| Task Location          | Click <b>Browse</b> , and select the project or folder location where you want to create the bulk update task.   |
| Template File Location | Location of the template file that contains the metadata to update the assets.<br>Select one of the following location types: <ul style="list-style-type: none"><li>- <b>Update from local file system</b> to upload the template file from your local system. Click <b>Validate</b>, and verify if the template file is valid.</li><li>- <b>Update from shared location</b> to provide the shared location path of the template file and the runtime environment. Click <b>Validate</b>, and verify if the shared location path is valid.</li></ul> |

- Click **Next**.  
Review the task details before you save and run the task.
- Do one of the following actions:
  - Click **Save and Close** to save the bulk update task.
  - Click **Save and Run** to save and run the bulk update task.

You can view the list of bulk update tasks in the **Explore > All Tasks** page. Use the **Type** filter to filter and view all the available bulk update tasks.

## Modifying a bulk update task

You can modify the details of a saved bulk update task to update the task name and description.

- On the left navigation menu, click **Explore**.
- From the explore drop-down list, select **All Tasks**.  
A list of all the assessment, parameter file conversion, workflow conversion, and bulk update tasks appears.
- Click the bulk update task that you want to edit.  
The **Task Details** page appears.
- Click the edit icon and modify the task details, such as the task name and description.
- Do one of the following actions:
  - Click **Save and Close** to save the bulk update task.
  - Click **Save and Run** to save the bulk update task and run it.



## Running a bulk update task

Run a bulk update task to start updating assets.

1. On the left navigation menu, click **Explore**.
2. From the explore drop-down list, select **All Tasks**.  
A list of all the assessment, parameter file conversion, workflow conversion, and bulk update tasks appears.
3. Click the **Actions** menu of the bulk update task row, and click **Run**.  
The bulk update task starts running. You can track the progress of the job in the **My Jobs** page.
4. Click the bulk update task that you want to run.  
The bulk update task details appear.
5. Verify the task details, and then click **Run**.  
CDI-PC sends an email notification after the conversion job completes.

## Deleting a bulk update task

You can delete a bulk update task if the task is no longer required.

1. On the left navigation menu, click **Explore**.
2. From the explore drop-down list, select **All Tasks**.  
A list of all the assessment, parameter file conversion, workflow conversion, and bulk update tasks appears.
3. Click the **Actions** menu of the row of the bulk update task, and click **Delete**.  
A warning message appears.
4. Click **Yes, delete** to confirm and delete the task.

# CHAPTER 5

## Jobs

You can monitor the status of the assessment, conversion, and parameter file conversion jobs from the **My Jobs** page.

When you assess a repository, run a conversion task, or run a parameter file conversion task, a job is created. You can track the progress of these jobs from the **My Jobs** page. You can view the job details, download reports, and log files. Use these reports to verify the job results and troubleshoot any issues. Additionally, you can stop a running job or restart a completed job, if required.

## Monitoring an assessment job

When you assess a repository, an assessment job is created. You can track the status of the job in the **My Jobs** page. After the job completes, you can view the job summary, download the files generated as part of the job, and access the task properties.

1. On the left navigation menu, click **My Jobs**.

A list of jobs appear with their current status.

**Note:** The job name for an assessment job is auto-generated in the following format:

`<DomainName>_<RepositoryName>_AssessmentTask`

2. Use the search option to find the job that you want to monitor.
3. Optionally, you can use the filter option to filter the jobs by type and status.
4. Click the job name that you want to monitor.

The job detail page appears, displaying the summary and properties of the job.

5. Click the **Task Name** link.

The **Task Details** page appears, displaying the following information:

- Task name, description, and type
- Shared location where the input files are placed
- Runtime environment on which the job was run
- Conversion use case selected for the assessment
- Domain and Repository names

# Monitoring a conversion job

When you run a conversion task, a conversion job is created. You can track the status of the job in the **My Jobs** page.

1. On the left navigation menu, click **My Jobs**.  
A list of jobs appear.
2. Use the search option to find for the conversion job that you want to monitor.
3. Optionally, you can use the filter option to filter the jobs by type and status.  
The type of conversion job is Conversion Task.
4. Click the conversion job name that you want to monitor.  
The job detail page appears, displaying the properties of the job and the list of workflows with their conversion statuses.  
**Note:** You can view the job details only for completed and failed jobs.
5. Select a workflow on the left pane.  
The right pane displays the asset details within the workflow.
6. Click the **Task Name** link.  
The **Task Details** page appears, displaying the following information:
  - Task name, description, and type
  - Project and folder location
  - Runtime environment on which the job was run
  - Repository name containing the workflows for conversion
  - List of workflows processed by the conversion job
  - Connection map and conversion properties configurations

# Monitoring a parameter file conversion job

When you run a parameter file conversion task, a parameter file conversion job is created. You can track the status of the job in the **My Jobs** page. After the job completes, you can view the job summary, download the reports, and access the task properties.

1. On the left navigation menu, click **My Jobs**.  
A list of jobs appear with their current status.
2. Use the search option to find the job that you want to monitor.
3. Optionally, you can use the filter option to filter the jobs by type and status.
4. Click the job name that you want to monitor.  
The job detail page appears that displays the summary and properties of the job.
5. Click the **Task Name** link.  
The **Task Details** page appears that displays the following information:
  - Task name, description, and location

- Location of the PowerCenter parameter file and conversion input file
- Runtime environment on which the job was run
- Project name

## Monitoring a bulk update job

When you run a bulk update task, a bulk update job is created. You can track the status of the job in the **My Jobs** page.

1. On the left navigation menu, click **My Jobs**.  
A list of jobs appear.
2. Use the search option to find the bulk update job that you want to monitor.
3. Optionally, you can use the filter option to filter the jobs by type and status.  
The type for bulk update jobs is Bulk Update Task.
4. Click the bulk update job name that you want to monitor.  
The job detail page appears that displays the summary and properties of the job.
5. On the left pane, select a workflow.  
The right pane displays the asset details within the workflow.
6. Click the **Task Name** link.  
The **Task Details** page appears displaying the following information:
  - Bulk update operation and asset type
  - Task name and description of the task
  - Location of the task
  - Project and folder containing the assets
  - Type of operation for the export metadata tasks
  - Template file location and the Excel file to be updated for the update metadata tasks

## Downloading job output files

After a job completes, you can download the reports, log files, templates, and other related files generated as part of the job.

1. On the left navigation menu, click **My Jobs**.  
A list of jobs appear.
2. Click the job name for which you want to download the reports.  
The job detail page appears, displaying the summary and properties of the job.
3. Click **Download All**.  
A zip file is downloaded containing the files generated as part of the job.

An assessment job contains the following files:

- Assessment reports
- Log files
- Template files for conversion

A conversion job contains the following files:

- Conversion reports
- Input files
- Log files
- Templates

A parameter file conversion job contains the following files:

- PowerCenter parameter file
- Data Integration parameter files
- Logs and reports

## CHAPTER 6

# Configurations

In CDI-PC, a configuration is a set of configured parameters that you can use in multiple tasks to customize the assessment and conversion behavior.

Based on the configuration type, you can use the configuration in assessment or conversion tasks.

You can create the following configurations:

- **Repoint Configuration:** If you want to repoint the assets to another endpoint, you need to create a repoint configuration. You can configure the PowerCenter connection type and the corresponding IDMC connection type to which you want to repoint the assets. You can use this configuration in assessment tasks to evaluate the feasibility of repointing the assets to another endpoint. For information on creating a repoint configuration, see the *Creating a Repoint Configuration* topic.
- **Connection Map:** Based on the assessment result, you can create a connection map configuration to map the PowerCenter connections to corresponding IDMC connections. You can use this configuration in conversion tasks. Based on the configuration, CDI-PC repoints the PowerCenter assets to the configured connection in IDMC. For information on creating a connection map configuration, see the *Creating a Connection Map configuration* topic.
- **Conversion Properties:** If you want to override the default conversion behavior, you need to create a conversion properties configuration. You can use this configuration in conversion tasks. For information on creating the conversion properties configuration, see the *Creating a Conversion Properties configuration* topic.

## Managing a configuration

You can manage an existing configuration by performing different actions on the configuration, such as modifying the configuration, creating a copy of an existing configuration, or renaming a configuration.

The **Configurations** page lists the repoint, connection map, and conversion properties configurations. Click the actions menu on a configuration and select the appropriate action to manage the configuration.

You can perform the following actions on a configuration:

### **View**

Click **View** to view the configuration details.

### **Edit**

Click **Edit** to modify the configuration description and properties for the configuration.

### **Copy**

Click **Copy** to copy the configuration to another domain and repository with a different name.

**Rename**

Click **Rename** to change the name of the configuration.

**Set as default**

Click **Set as default** to set the configuration as the default configuration. For each configuration type, you can set one configuration as default. When you select a configuration in assessment or conversion tasks, the configuration is marked as default.

**Delete**

Click **Delete** to delete a configuration. You can delete a configuration only if it is not associated with any assessment or conversion task.

## Accessing configurations associated with domains and repositories

You can access the configurations associated with a domain or repository from the **Explore** page.

Each configuration that you create is associated with either a domain or a combination of a domain and repository. The **Configurations** page displays the list of all the configurations. You can filter the configurations by domain or repository. Alternatively, you can access to the domain or repository from the **Explore** page, and then access the configurations associated with a domain or repository.

1. On the left navigation menu, click **Explore**.
2. From the **Explore** list, select **Domain** or **Repository**.
3. From the actions menu of the domain or repository, click **View Configurations**.

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